



Hall & Partners

Blue Mountains Wildlife Park

Audience Survey – Top line report

November 2020

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Audience survey-

Methodology and sample profile



Survey

Online

Panel Recruited



Length of interview

20 minutes



Fieldwork timing:

September 2020



Main sample:

Nationally representative
of Australia



Sample Boost

Blue Mountains Residents

Benchmark case study framework

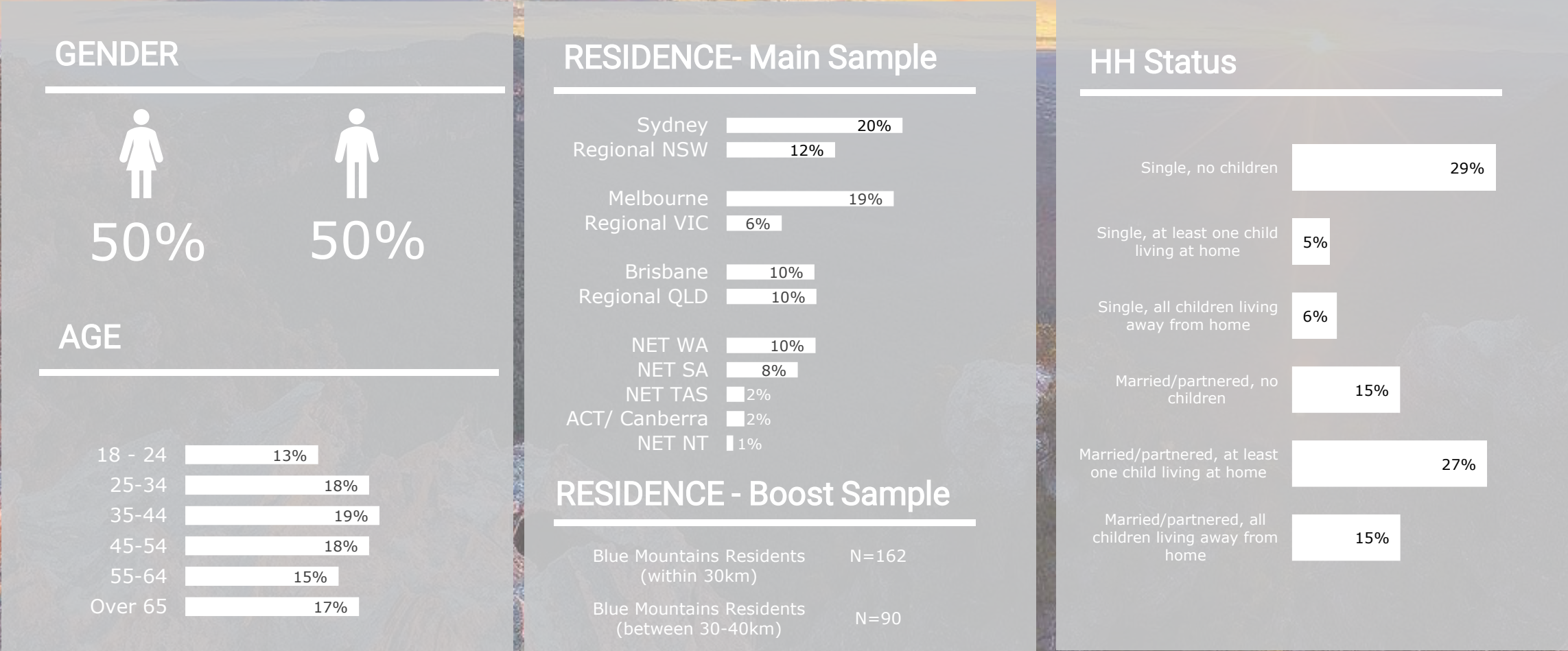
The audience survey was conducted via an online survey of participants recruited via an opt-in consumer panel

Line of questioning

- Survey screening
 - Age, Gender, location, household and Age of Children in HH
- Blue Mountains- Scoping location demand
 - Claimed awareness, past visitation, visitation frequency, past trip types and consideration to visit in the future, reasons the region appeals, as well as reasons reluctant to visit
- General category behaviour
 - Gauging category demand by assessing appeal, usage frequency and consideration of Wildlife parks, Luxury accommodation
- Concept evaluation
 - Introduction of overall development concept, followed by assessment of each concept in isolation
 - Appeal, likelihood to visit/use, likes & dislikes
 - If considerers: visitation frequency, companion, trip type, distance willing to travel
- Assessment of development features
 - Appeal, propensity to shift likelihood to visit
- Price elasticity
 - Assessment of willingness to spend on each concept, by determining the range of acceptable prices using four data points collected for each concept (too expensive to consider, getting expensive but still may consider, a bargain and so cheap that the quality would be questioned.
 - Concepts were evaluated on:
 - Wildlife park: Entry Fee
 - Luxury Accommodation: Price per night
 - Dining Experience: Cost per person

Sample

The audience survey spoke to n=1000 Australians, of which n=751 were representative of the Australian population, weighted to Age, Gender and Location. The Sample was boosted by n= 252 residents within 40km of the Blue Mountains to allow sufficient sample to analyse local demand for the development.



Source: Hall & Partners Audience Survey Sep 2020; Base size: Main Sample (n=753) Boost Sample (n=263)

Blue Mountains region

Key findings – Australia and NSW residents

89%

Are aware of the region

94% among NSW Residents

64%

Have visited

88% among NSW Residents

There is a 50% chance Australians will visit the Blue mountains in the next 5 years*

62% among NSW Residents

30%

Of interstate visitors have visited more than once

54% among NSW Residents

Beautiful scenery is the top driver of visitation

(As Top 4 selected by 72%)

78% among NSW Residents

24%

would come to the Blue Mountains for a luxury getaway

22% among NSW Residents

23%

consider Zoos & Wildlife parks a top 4 reason to visit

21% among NSW Residents

42%

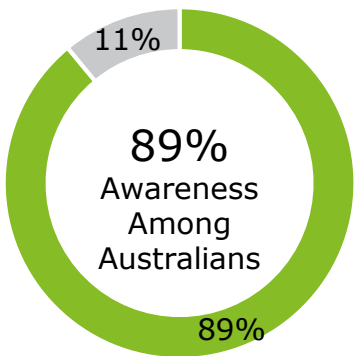
would be reluctant to visit due to Covid-19 uncertainties

38% among NSW Residents

* Calculated using the average response of a 11-pt Juster scale, which calculates the average probability that a population will do something by a future time

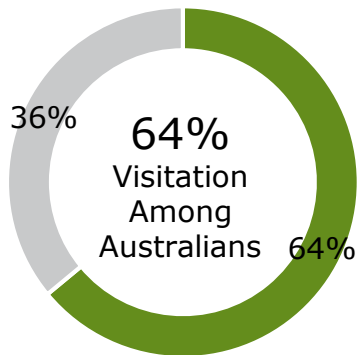
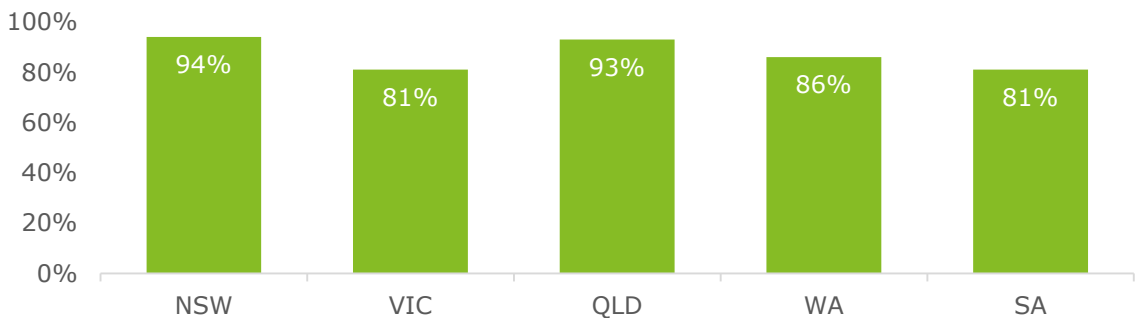
Blue Mountains region

Awareness and visitation among Australians



Awareness

- 94% among NSW residents.
- Victoria (81%) and South Australia (81%) are least likely to be aware



Past visitation

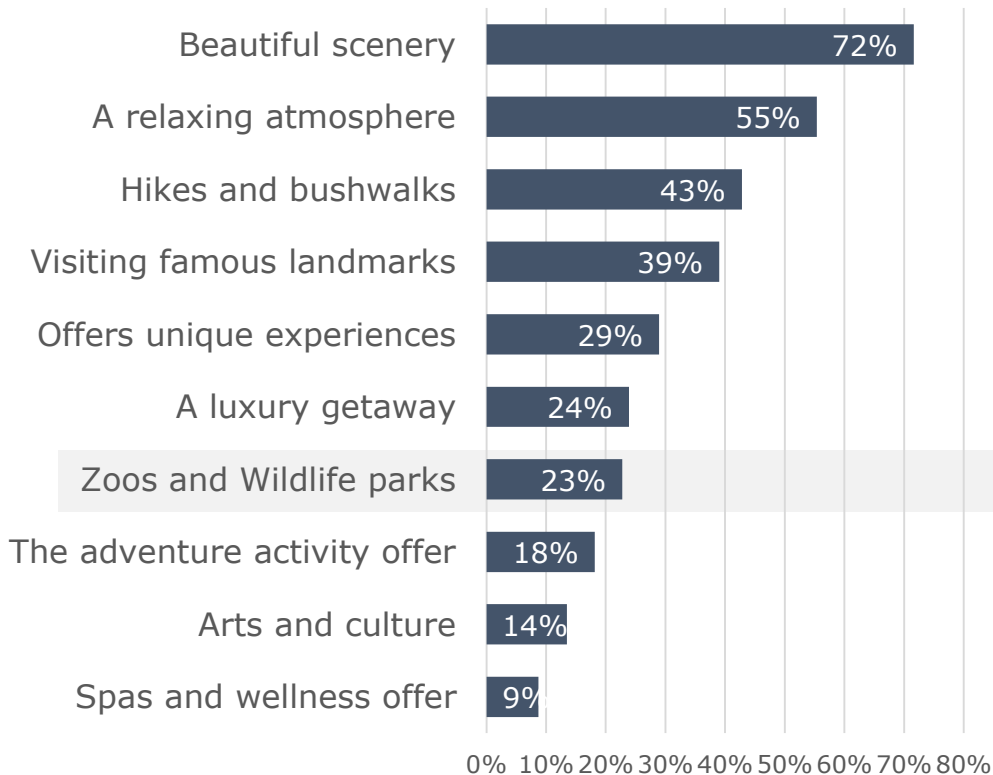
- 88% NSW residents have visited the Blue Mountains in the past. Of these
- 33% have done so in the last 5 years and
 - 34% more than 5 years ago



Blue Mountains region

Drivers and barriers of visitation

Reasons to visit



Beautiful scenery and a relaxing atmosphere are the most compelling reasons to visit the region.

Highest among families (28%) and Melbournians (30%)

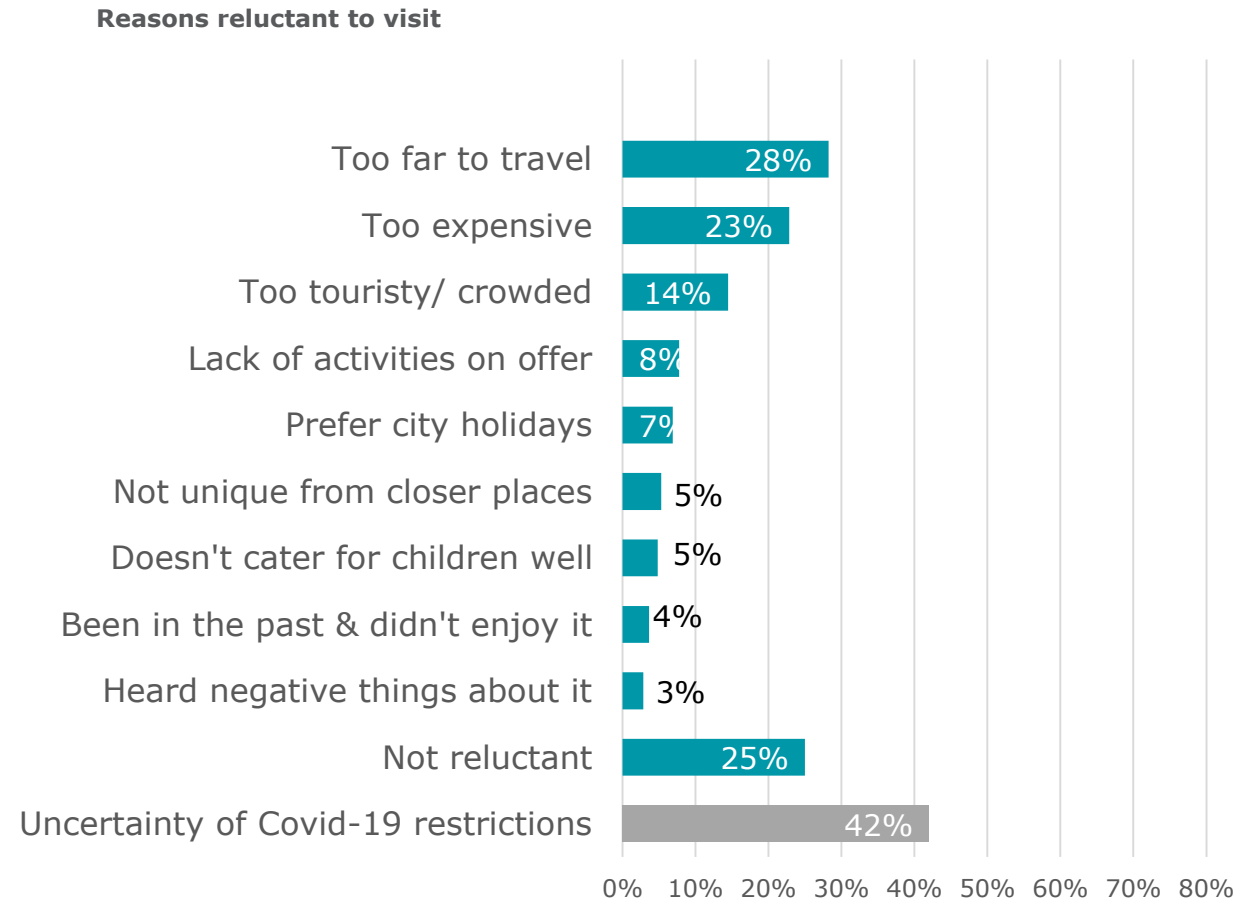
Lowest among empty nesters (13%)

Blue Mountains region

Drivers and barriers of visitation

NSW residents are least likely to claim it is too far to visit (18%) or too expensive (17%), however, they are most likely to be reluctant due to perceptions of being touristy and overcrowded (19%).

Uncertainty around travel restrictions are most mentioned reluctance to visit, highest among QLD and WA residents (both 49%).



Blue Mountains

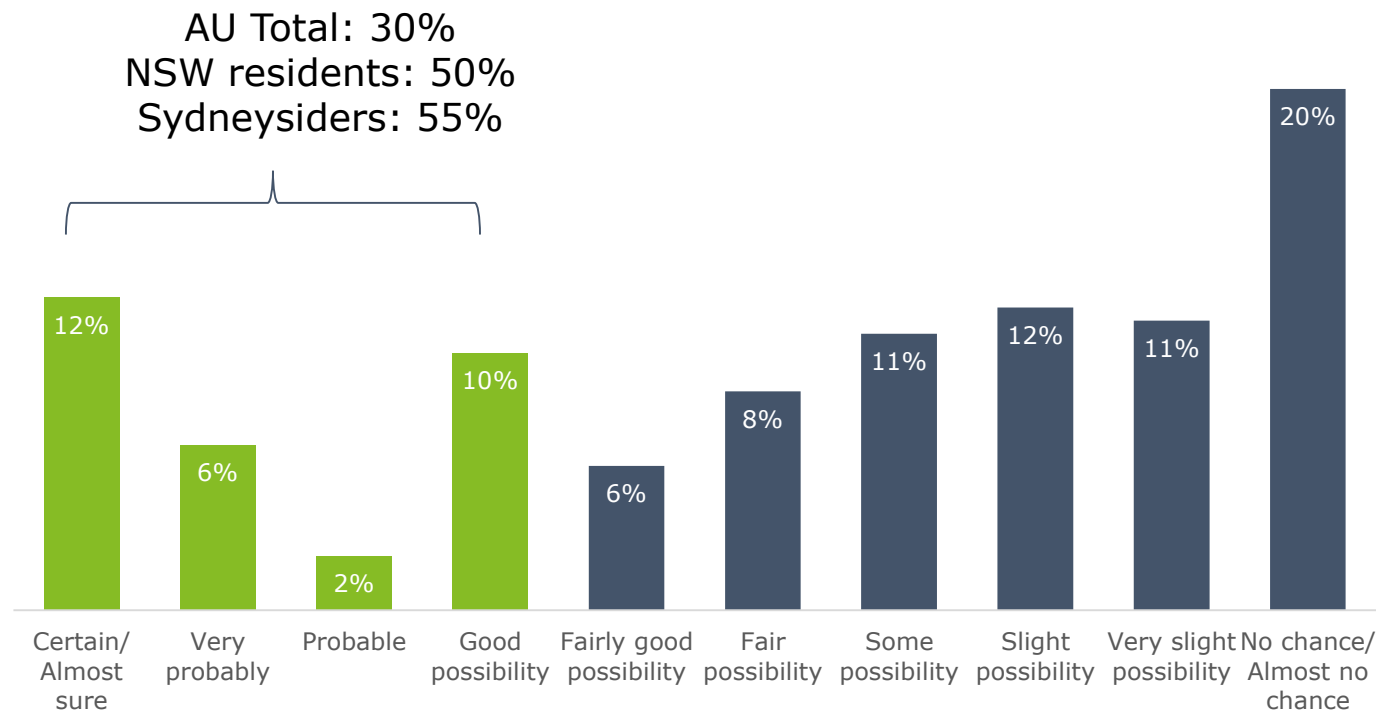
Likelihood to visit

Probability highest among families (44%) and high income earners (250k+) 51%

Significantly lower among Empty Nesters (28%), Queenslanders and South Australians (27% each).

Likelihood of visiting the Blue Mountains in the next 5 years among non-residents

NET Good Possibility (top 4):



Source: Hall & Partners Audience Survey Sep 2020; QL4 How likely are you to visit the Blue Mountains in the next 5 years? Base size: Main Sample (n=739) Low Income earners (316) High income earners (n=71) NSW Residents (n=447) Greater Sydney (n=354)

Category interest

Wildlife Parks, Luxury Accommodation

General category interest – Total Australians



Visit a wildlife
sanctuary/park

82%

Are interested in visiting wildlife
parks (%very interested/interested)

63%

Have visited at least once a year in
the last 2 years

67%

Are likely to visit in the next 2 years
(%very likely/likely)



Stay in a 5-star luxury
accommodation

68%

Are interested in staying in 5-star
luxury accommodation
(%very interested/interested)

46%

Have stayed at least once a year in
the last 2 years

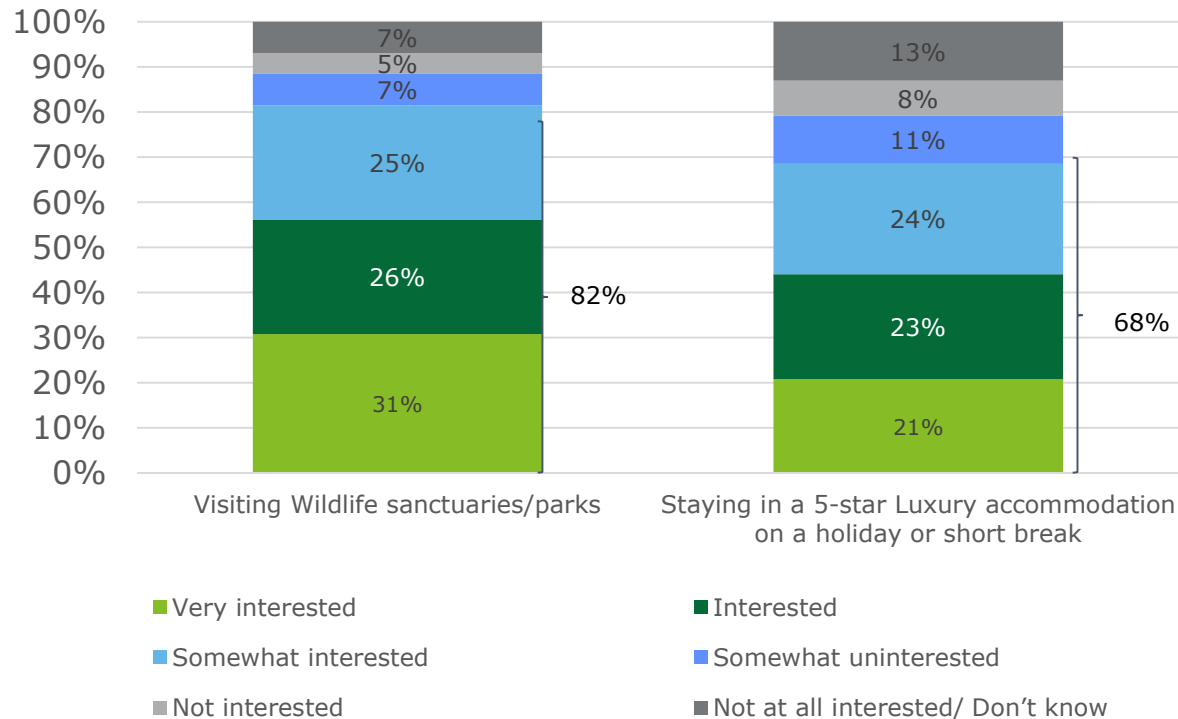
51%

Are likely to stay at in the next 2
years
(%very likely/likely)

General category interest

Assessing the potential market

Interest: Wildlife park, 5-star luxury accommodation



Wildlife Park general interest

Wildlife parks attract interest among 82% of Australians

- Strong interest skews marginally towards families
- Less interest among singles without children and empty nesters

Staying in 5-star Luxury Accommodation

- Particularly high among couples without children (71%) and... families (77%)
- Interest increases with income – up to 84% among high income earners

General category involvement

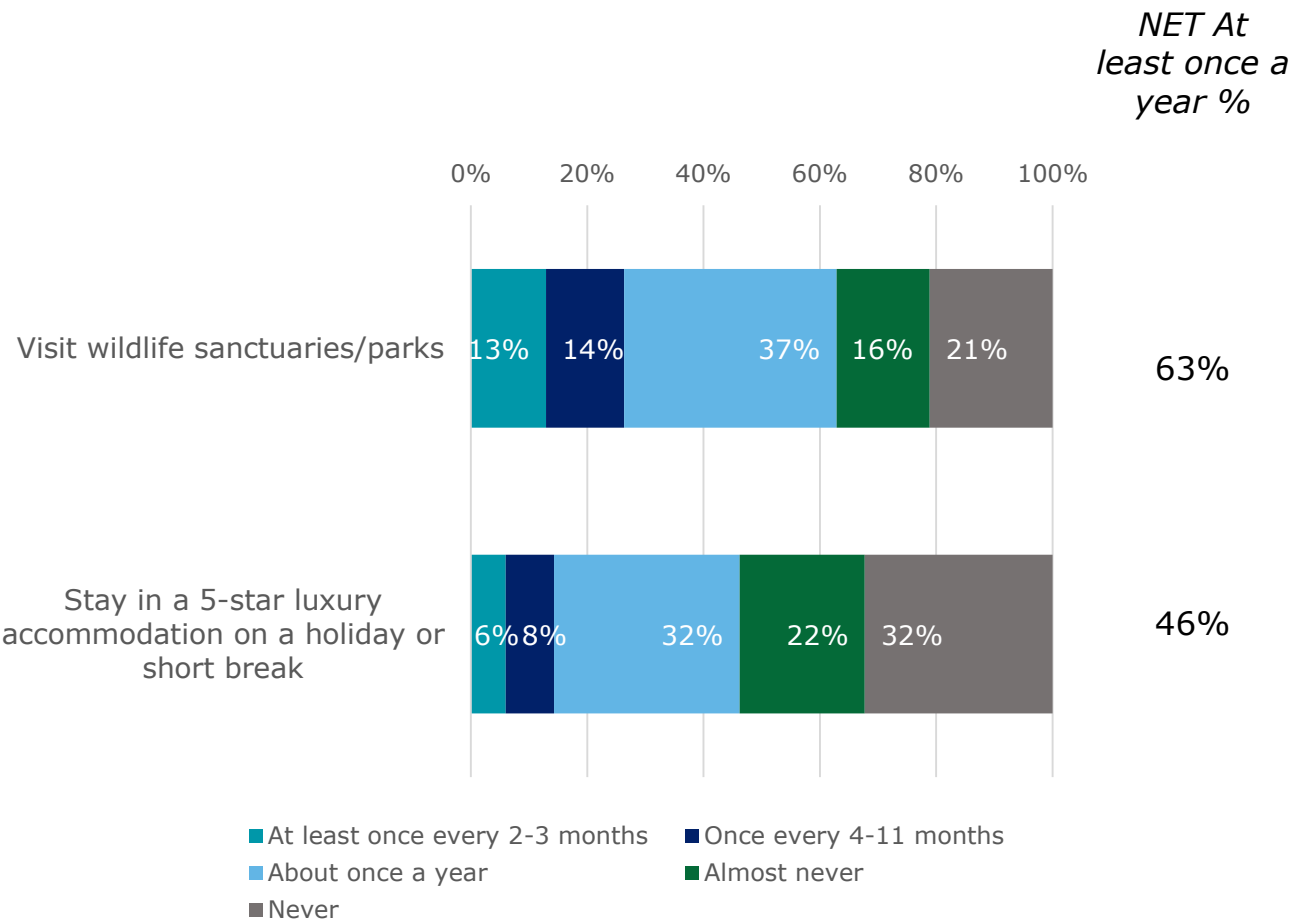
Frequency of engagement - last 2 years

Wildlife Park Sanctuaries/ Parks

- **Sydneysiders** are significantly more likely than regional NSW residents to have visited (67% vs 55%)
- Visitation is highest among **families** (76% at least once in the last 2 years)
- Lowest among **empty nesters** (54%) and Singles without children (56%)

Staying in 5-star luxury accommodation

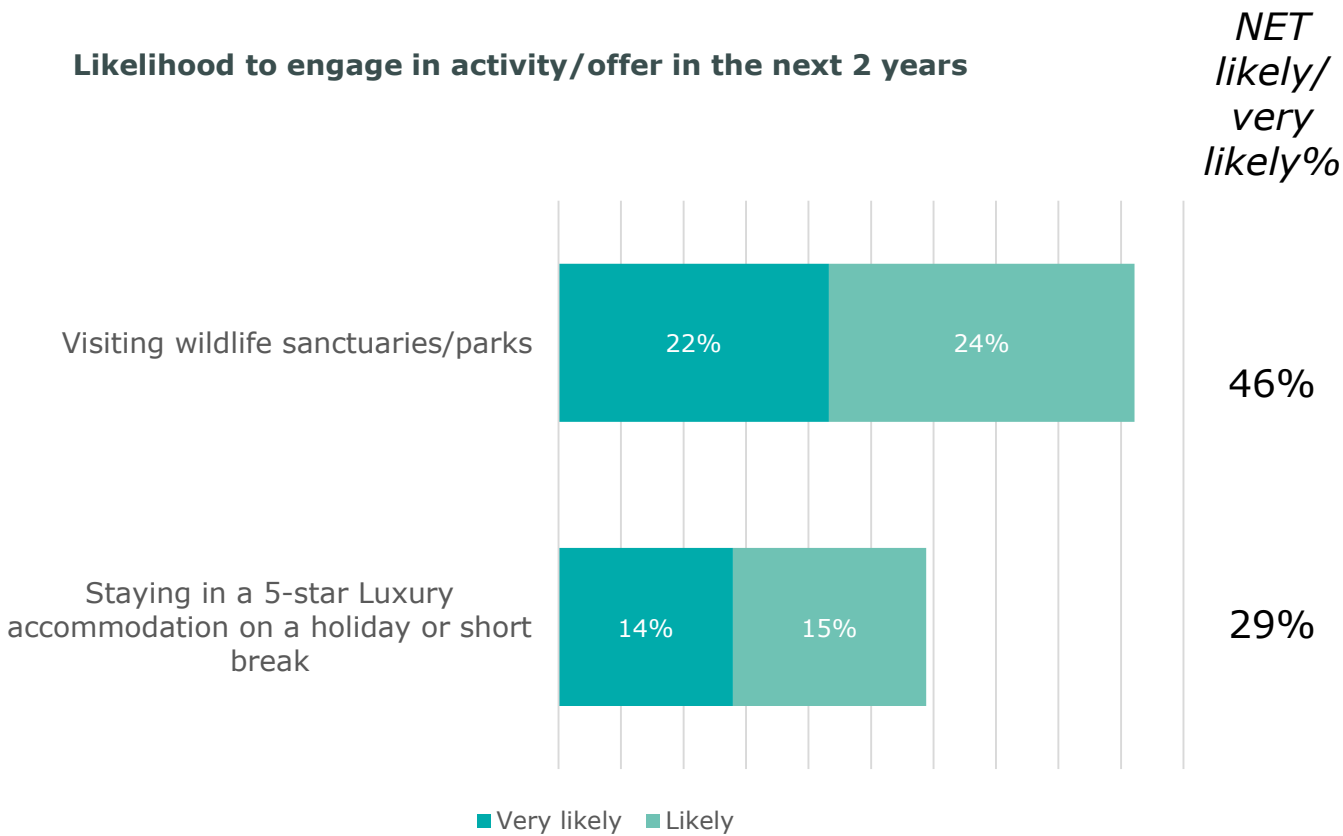
Highest among couples without children (59%) and families (56%)



Source: Hall & Partners Audience Survey Sep 2020; Q - Thinking about the last 2 years, how often did you...? Base size: Total AU (n=739) Sydneysiders (n=142) Regional NSW (n=91)

Category – likelihood to engage

Next 2 years



Wildlife park sanctuaries/parks

- Families are most likely to go (56%)
- Likelihood is similarly as high among residents (42%), but significantly higher among Sydneysiders (59%)

Staying in 5-star luxury accommodation

- Men are more likely than women to stay in luxury accommodation (35% vs 24% females)
- Likelihood increases with income (Low HHI 21%, Medium HHI 36%, High HHI 46%)

Source: Hall & Partners Audience Survey Sep 2020; Q3 How likely are you to visit the Blue Mountains in the next 5 years? Base size: Main Sample (n=739) NSW (n=233) Families (237) SINKS (263) HHI Low <60k (n=410) Low HHI 60-150k (n=414) High HHI 250k+ (n=101)

Concepts

Wildlife park, 5-star luxury accommodation, food & beverage experience

Concept as
shown in
audience
survey

Wildlife experience

Make lifetime memories when entering a true wildlife experience and encounter personal interactions with kangaroos, koalas, wallabies, and more.

Immerse yourself in wildlife exhibits, spread across 25 acres of pure nature and experience animal hospitals and sanctuaries, as well as contribute to conservation programs, endangered species programs, and wildlife rehabilitation.

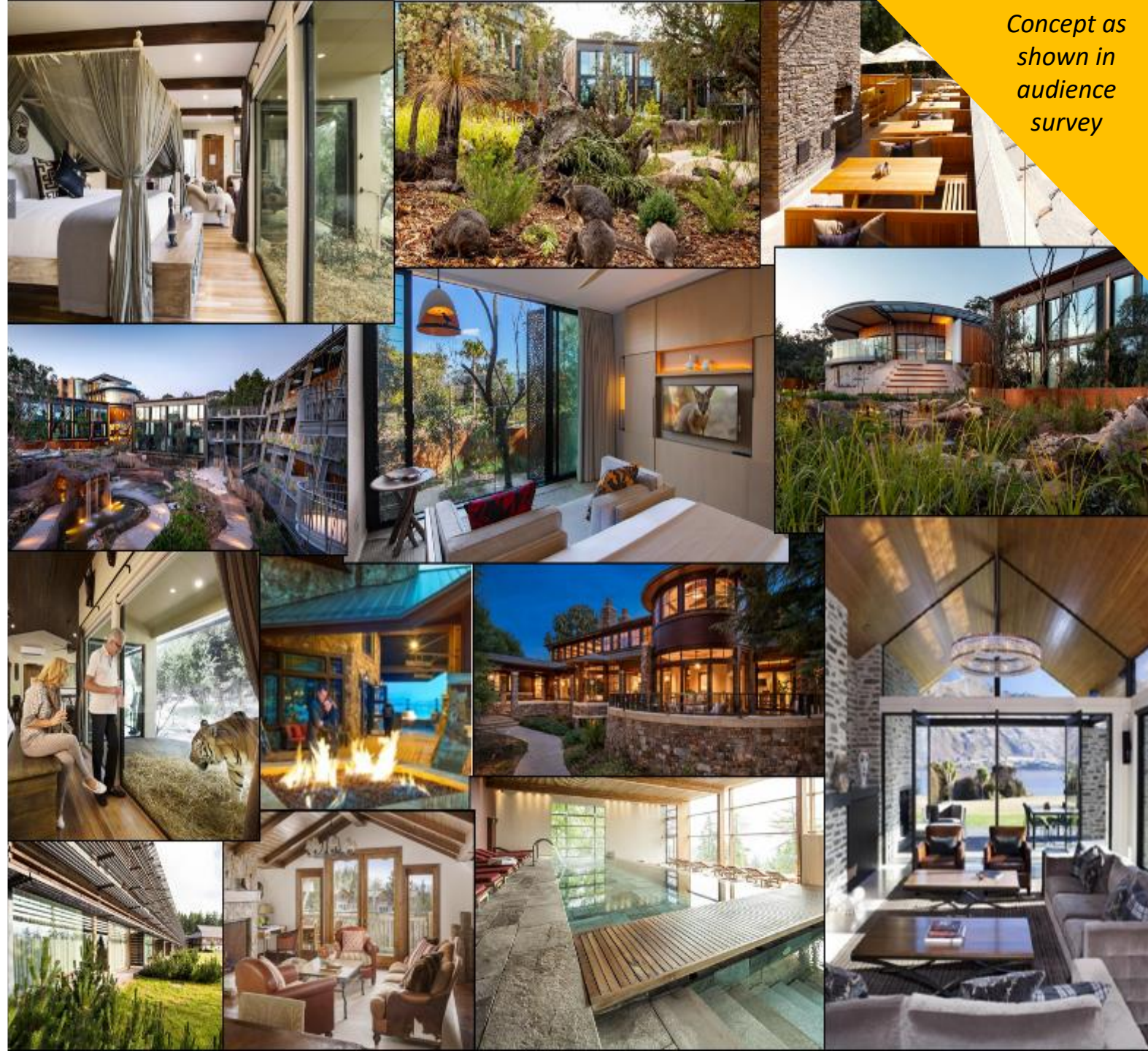
Walk through exhibits and enclosures while enjoying scenic, relaxing and landscaped gardens with views down to Sydney and Southern Highlands.

Luxury Wildlife Accommodation

Indulge in a 5 star accommodation with amenities and service that will make it feel like a home away from home.

Stay in a room with a subtle wildlife theme, overlooking wildlife enclosures and natural vistas while enjoying the comforts of a 5 star hotel such as gym, pool & spa, business facilities & function center, restaurant and bar.

You will want to come back, not just for the service and room comfort, but also the stunning surrounding park features that will induce remarkable tranquility.



Concept as
shown in
audience
survey

Food & Beverage Experience

Enjoy a range of food and beverage offerings from healthy take-away, casual dining, to fine dining.

Experience leading and premium label chefs and providores providing menus with a collection of the finest local Australian food and beverage offerings, all in the one location- and at affordable family pricing.

Enjoy the casual dining experiences in open and closed areas including large outdoor dining terraces and areas.

Indulge in seasonal menus developed by a range of leading Australian chefs either in the fine dining restaurant or the 'gastro' pub inside the Wildlife Hotel.

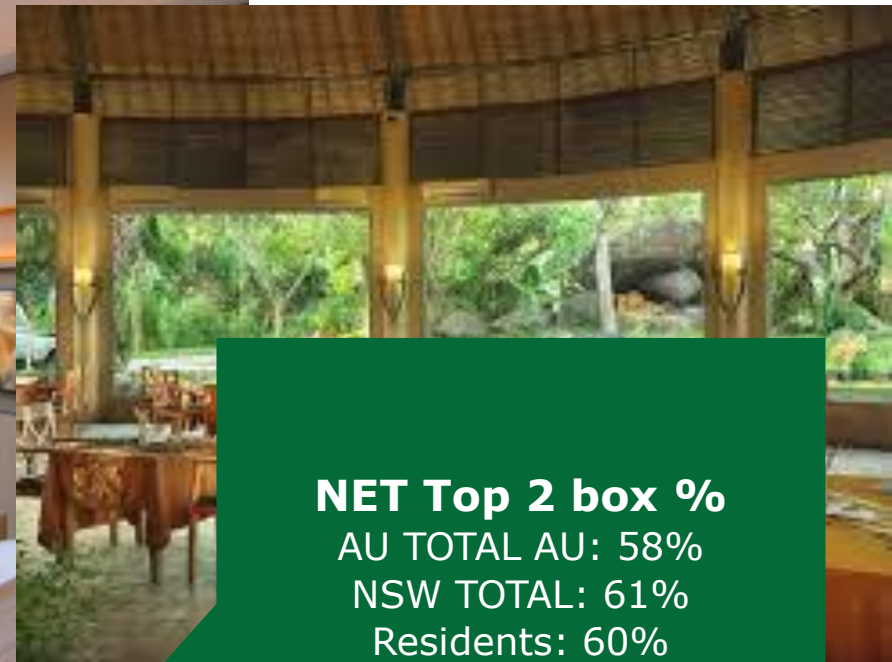
Concept as
shown in
audience
survey



A group of five people are interacting with a large group of kangaroos in a grassy field. A man in a black t-shirt is leaning over to pet a kangaroo. A woman in a blue shirt is sitting on the grass, surrounded by kangaroos. Two other men are kneeling on the right, also interacting with the kangaroos. The background is filled with tall trees.

58%

.. % of Australians consider the concept at least somewhat appealing, about **one in four** very much so.



NET Top 2 box %
AU TOTAL AU: 58%
NSW TOTAL: 61%
Residents: 60%

OVERALL CONCEPT- APPEAL

How appealing do you consider the idea of these concepts overall?



■ Very appealing ■ Appealing ■ Somewhat appealing ■ Somewhat unappealing ■ Unappealing ■ Not at all appealing ■ Not sure

Source: Hall & Partners Audience Survey Sep 2020; C1 How appealing do you consider the idea of these concepts overall? Base size: Total AU (n=751) NSW (n=233) Residents (n=162)

Overall Concept- likelihood to visit in next 2 years

NET at least fairly good possibility %

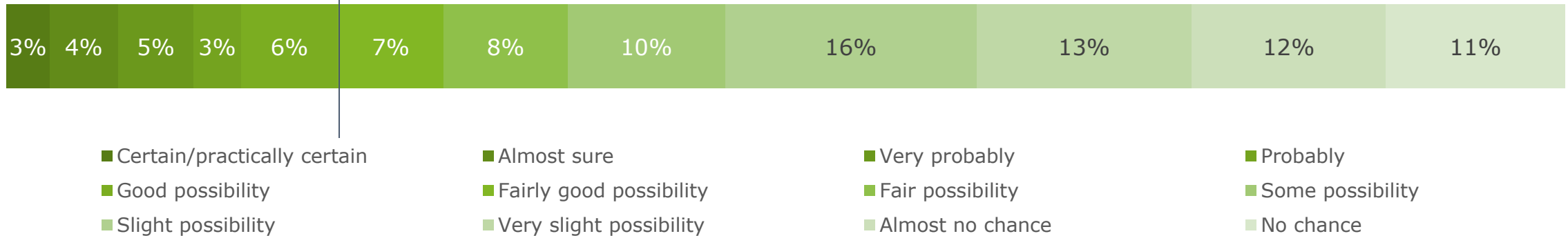
AU TOTAL: 27%

NSW TOTAL: 35%

Residents: 29%



Imagining this attraction were to open in the Blue Mountains (New South Wales) and Covid-19 travel restrictions were not an issue... How likely is it that you would visit this attraction in the next 2 years?

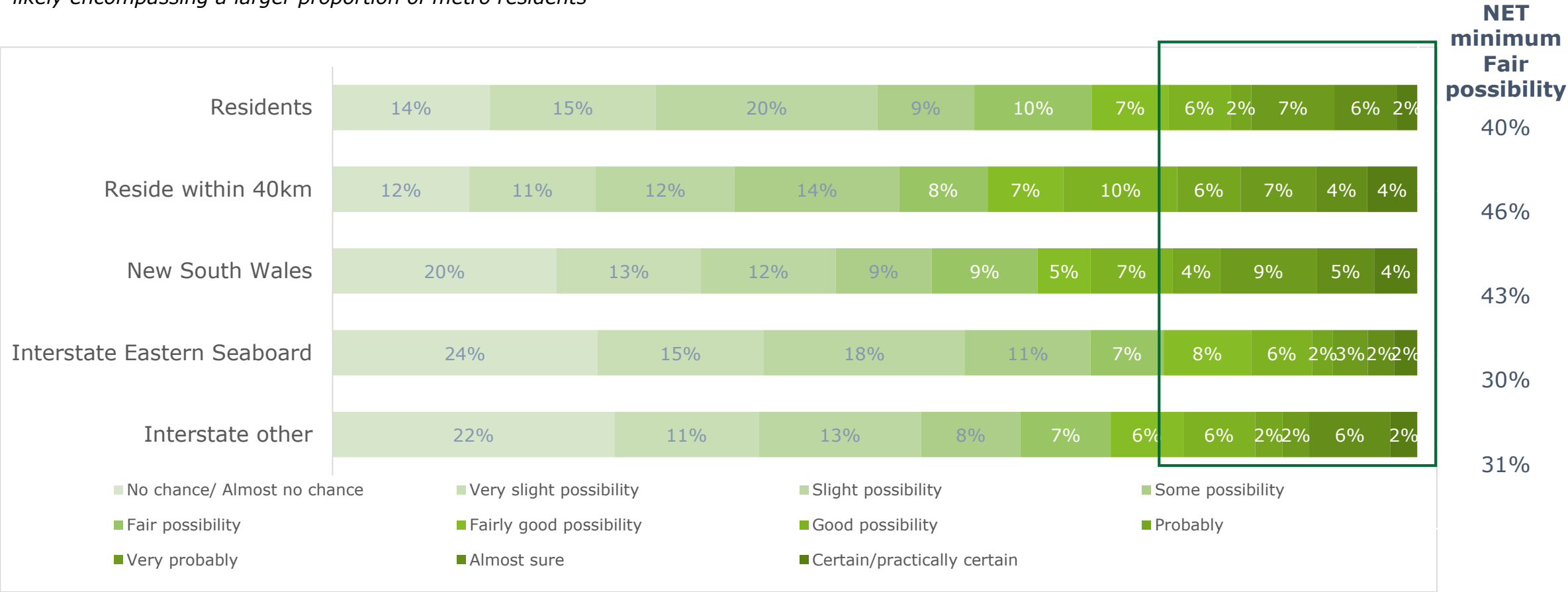


Source: Hall & Partners Audience Survey Sep 2020; QC2 Imagining this attraction were to open in the Blue Mountains (New South Wales) and Covid-19 travel restrictions were not an issue.. How likely is it that you would visit this attraction in the next 2 years? Base size: Total AU (n=751) NSW (n=233) Residents (n=162)

Overall concept – likelihood to visit




Next 2 years by residence




Interest to visit the development is greatest among people living around 40km radius, likely encompassing a larger proportion of metro residents



Source: Hall & Partners Audience Survey Sep 2020; QU2 C2 - Imagining this attraction were to open in the Blue Mountains (New South Wales) and Covid-19 travel restrictions were not an issue... How likely is it that you would visit this attraction in the next 2 years? Base size: Residents (n= 162) Reside within 40km (n=90) NSW (n=233) Interstate- Eastern Seaboard (n=378) Interstate Other (n=142)

Overview of concept performance

Among Total Australians (n=751)	 Wildlife Park	 Luxury Accommodation	 Food & Beverage
Appeal (% appealing or very appealing)	60%	56%	59%
Likelihood to visit (at least fair possibility)	39%	41%	44%
Frequency of visitation among considerers (Min 1x per year)	21%	18%	23%
Shift in mindset (% feel more positive about the Blue Mountains)	60%	57%	57%

Among Residents (n=162)	 Wildlife Park	 Luxury Accommodation	 Food & Beverage
Appeal (% appealing or very appealing)	69% ▲	61%	65%
Likelihood to visit n=162 (at least fair possibility)	46% ▲	49%	56% ▲
Frequency of visitation among considerers (Min 1x per year n=126)	34% ▲	18%	33% ▲
Shift in mindset (% feel more positive about the Blue Mountains)	63%	63%	63%

▲ = significantly higher vs total Australians

Wildlife Park

Probability to visit

39%

Fair /Fairly good / Good possibility/ Probable/ Very probably/Almost sure/ Certain/practically certain

▲ 46% among residents

Frequency of visitation

21%

At least 1x per year

▲ 34% among residents

▲ = significantly higher vs total Australians

COMPANION

	Total AU %	Residents %
Partner	63%	62%
Friends	30%	25%
Children	34%	44% ▲
Parent	12%	15%
Extended Family	15%	22% ▲
Sibling	10%	14%

WILLINGNESS TO TRAVEL

	TOTAL AU (%)
Less than 1 hour	14%
1-2 hours	40%
3-4 hours	22%
Distance would not be a factor	24%



SHIFT IN MINDSET

60%

Feel more positive about the Blue Mountains after seeing the concept

(%much more, more, a little more)

63% among residents

DEMOGRAPHICS

Likelihood to visit higher among

- ▲ Families (46%) (vs 38% Total AU)
- ▲ Medium Income 60-150k (44%)
- High income 250k+ (44%) (vs 38% Total AU)

▲ = significantly higher vs total Australians



Wildlife park – Appeal

Open Text



"I'd love to visit this sanctuary/park as I do love Aussie native animals."

"The whole idea and the actual involvement"

An experience where wildlife and rehabilitation for animals is rather different and I really like the idea

"Being able to observe native Australian wildlife up close - especially endangered species."

"Experiencing animals up close and seeing them in a natural setting"

"The aspect of having scenery whilst being there"

"Seeing the local animals and experiencing nature would make it a fun and memorable time"

"I like the size of the park and the location"

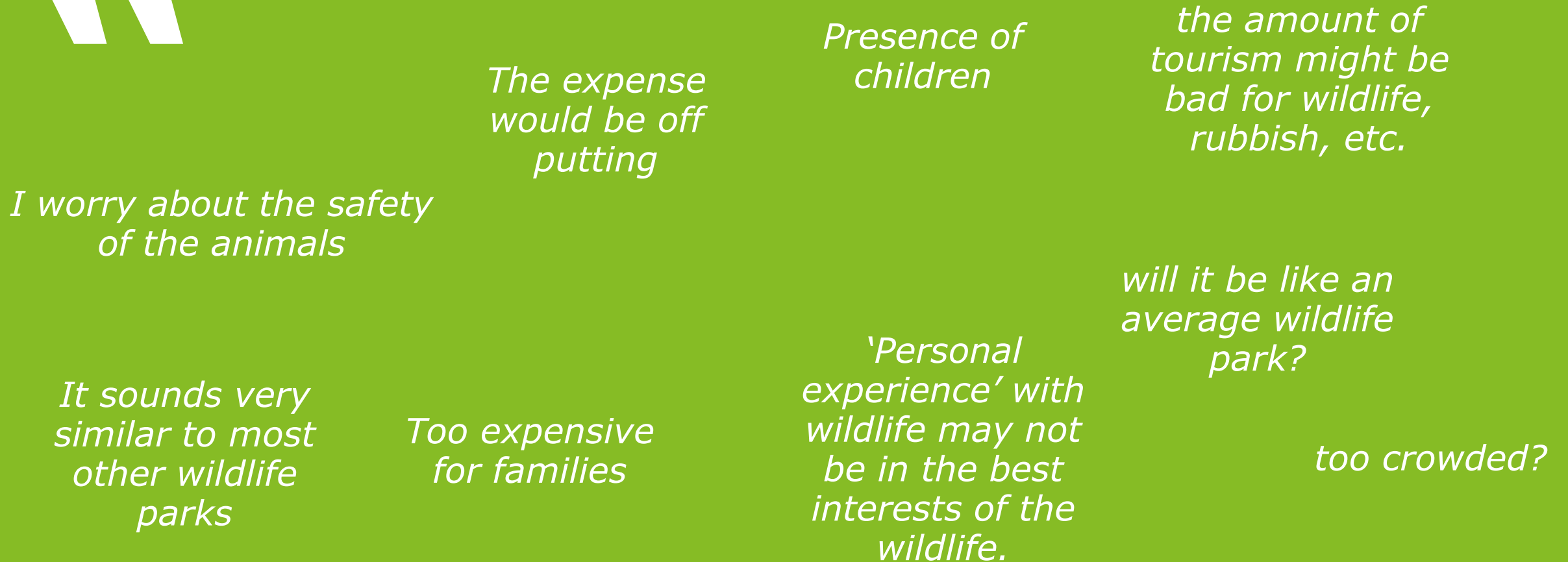
"We enjoy wildlife parks, however we have visited many. Nevertheless it is worth a visit"

Source: Hall & Partners Audience Survey Sep 2020; Q- What about these concepts appeals to you? - Wildlife sanctuary/park



Wildlife park – Reservations

Open Text



Source: Hall & Partners Audience Survey Sep 2020; QC5 What about these concepts do you have reservations about– Wildlife park

Luxury accommodation

Probability to visit

41%

Fair /Fairly good / Good
possibility/ Probable/ Very
probably/Almost sure/
Certain/practically certain

▲ 49% among residents

Frequency of visitation

18%

At least 1x per year

▲ 18% among residents

▲ = significantly higher vs total Australians

COMPANION

	Total AU %	Residents %
Partner	67%	73%
Friends	26%	22%
Children	26%	28%
Parent	13%	13%
Extended Family	10%	9%
Sibling	8%	10%

WILLINGNESS TO TRAVEL

	TOTAL AU (%)
Less than 1 hour	9%
1-2 hours	39%
3-4 hours	24%
Distance would not be a factor	27%



SHIFT IN MINDSET

57%

Feel more positive about the
Blue Mountains after seeing the
concept

(%much more, more, a little more)

63% among residents

DEMOGRAPHICS

Frequency of visitation
(min 1x per year) higher among:

- ▲ Sydneysiders (29%)
(vs 24% Total AU)
- ▲ High income 250k+ (39%)
(vs 24% Total AU)
- ▲ 25-34yo (39%)
(vs 24% Total AU)
- ▲ Males (29%)
(vs 19 Females)

▲ = significantly higher vs total Australians



Luxury accommodation – Appeal

Open Text



**Gotta have a little
luxury in life sounds
fabulous**

**I love how luxurious the rooms
are and how they overlook the
wildlife enclosures. I love all
the 5-star amenities. I love
how tranquil the surroundings
seem**

**I would like to spend a couple
of nights on a luxury hotel
however we are 4 and could
be expensive for us if there is
no promotions**

**Seems like it would be very
relaxing, and would enjoy the
themed rooms and
overlooking the animals**

**Wow what a fantastic
way to enjoy a holiday
but in this
accommodation.**

**I can't afford this, but would
love to go one day**

**a nice escape for a few days
while getting away from it
with some luxury, but the
setting of nature**

**this sounds like a great
unique place to stay**

**I like the idea of staying in a
nice hotel and being so close
to the wildlife**

Source: Hall & Partners Audience Survey Sep 2020; Q- What about these concepts appeals to you? – Luxury Accommodation



Luxury accommodation - Reservations

Open Text



it would be way too expensive for average people

I do not need or like 5-star accommodation - you don't use all those facilities. Doesn't fit with the wildlife park concept

Generally over-priced and never meets the expectations

All of it, is not affordable for aged pensioners, only younger people

I'm worried the wildlife might come too close to the rooms

The accommodation would be poor value for money and many of the services would remain unused

As long as it's affordable

I prefer choosing an air bnb as it's usually a more of a personalised experience

Luxury accommodations tend to be all bells and whistles without actual content

Source: Hall & Partners Audience Survey Sep 2020; QC5 What about these concepts do you have reservations about- Luxury Accommodation

Food & beverage experience

Probability to visit

44%

Fair /Fairly good / Good
possibility/ Probable/ Very
probably/Almost sure/
Certain/practically certain

▲ 56% among residents

Frequency of visitation

23%

At least 1x per year

▲ 33% among residents

▲ = significantly higher vs total Australians

COMPANION

	Total AU %	Residents %
Partner	65%	68%
Friends	33%	29%
Children	27%	38% ▲
Parent	15%	16%
Extended Family	13%	17%
Sibling	11%	11%

WILLINGNESS TO TRAVEL

	TOTAL AU (%)
Less than 1 hour	14%
1-2 hours	40%
3-4 hours	22%
Distance would not be a factor	24%



SHIFT IN MINDSET

57%

Feel more positive about the
Blue Mountains after seeing the
concept

(%much more, more, a little more)

63% among residents

DEMOGRAPHICS

Frequency of visitation
(min 1x per year) higher among:

- ▲ Sydneysiders (45%)
(vs 23% Total AU)
- ▲ High income 250k+ (50%)
(vs 23% Total AU)
- ▲ 25-34yo (48%)
(vs 23% Total AU)
- ▲ Males (36%)
(vs 26% Females)

▲ = significantly higher vs total Australians



Food & beverage experience – Appeal

Open Text



Eating different types of food but having healthy options

I like how the food is quite premium but still with a reasonable price tag

I like the idea of trying different food and beverages and broaden my tastes

Massive range of food and beverages to cater for all tastes

When we go away, we like to indulge in a few top end meal experiences, this looks premium to me

Very exciting to try native ingredients

Sounds interesting, depends if intolerances are well included for

I love the idea of being able to get fresh healthy food on site, healthy take away is almost always unheard of when on holiday, it is something I always search for. The restaurant looks so interesting and totally fits with the wildlife theme.

Having a treat and someone cook for me

the range of dining sounds great but suggests the venue will be massive to offer the range

Source: Hall & Partners Audience Survey Sep 2020; Q- What about these concepts appeals to you? – Food & Beverage Experience



Food & beverage experience – Reservations

Open Text



I'm worried the food might be boring. I really want to eat unique artisanal food sourced from local producers.

Gastro is about the worst name possible for a food venue

Family atmosphere, probably crowded with children

I might prefer to seek out spontaneous experiences, rather than having it all in front of me as that's part of the joy in holidays for my partner and I

The variety of food options, whether or not the menu will be unique

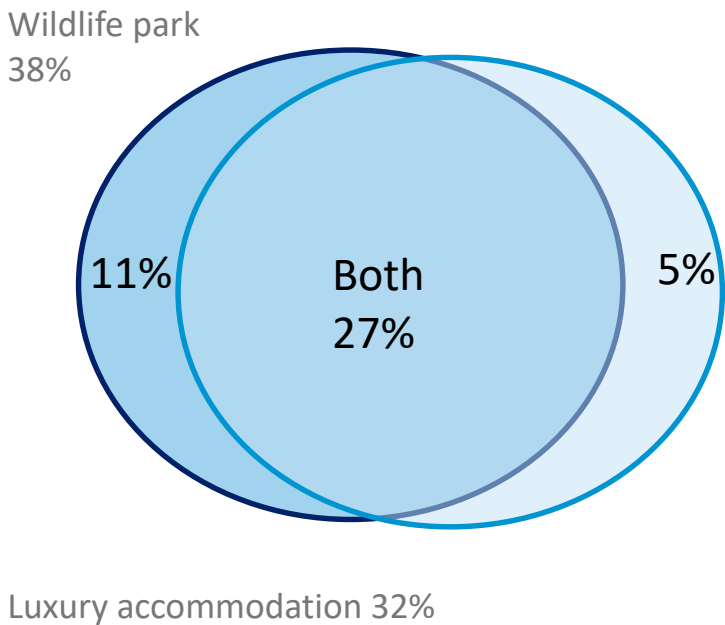
Prefer to mix with locals for more local interaction and at a better price

With COVID, I would be concerned about a buffet style service

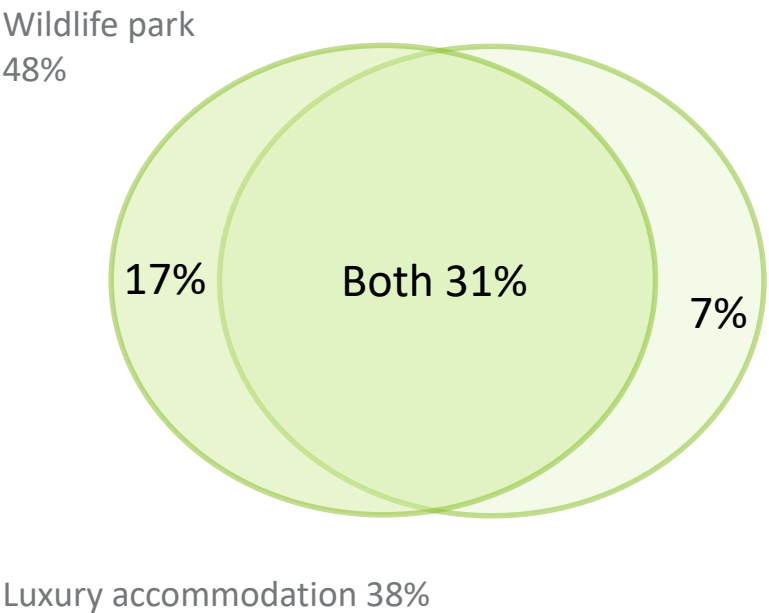
Outdoor with too many insects at night

Likelihood to visit Total Australians vs Residents

Likelihood to visit, Total AU



Likelihood to visit, Residents



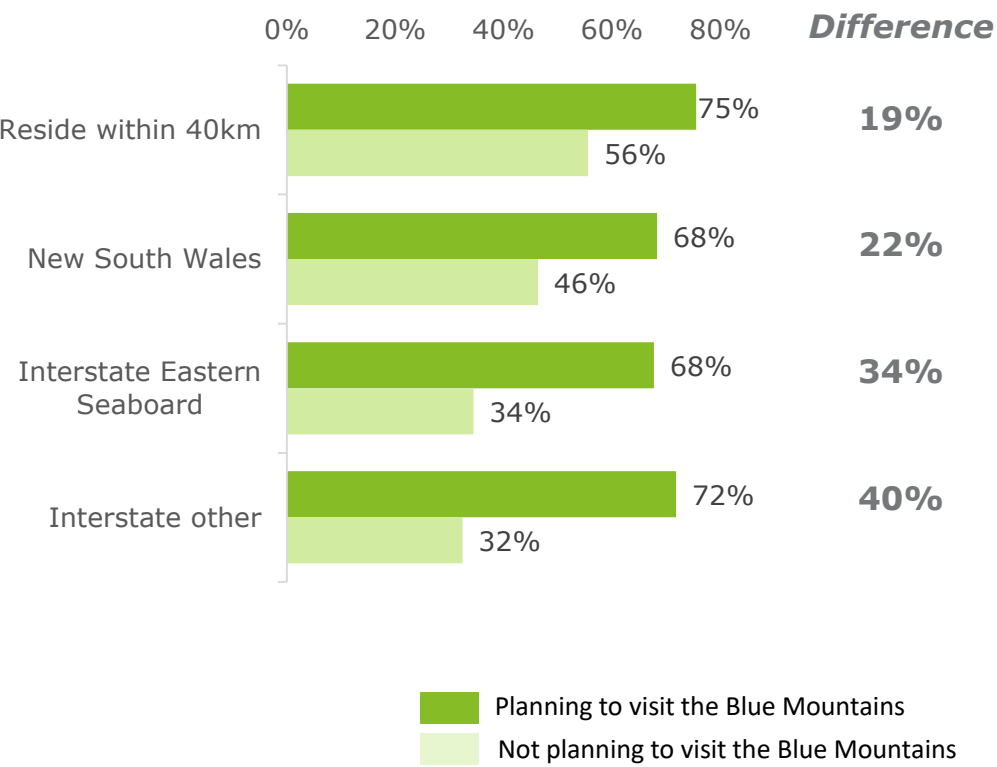
NET Fairly good possibility + Good possibility + Probable + Very probably + Almost sure + Certain/practically certain

Impact

Likelihood to visit (among intending to visit the Blue Mountains vs not)

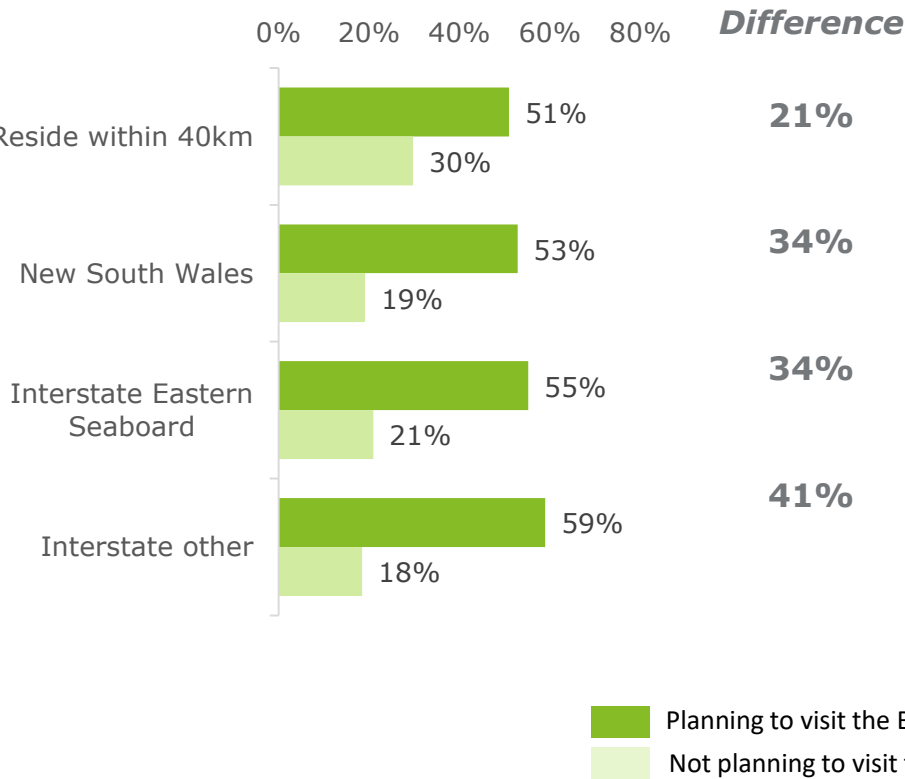
WILDLIFE PARK

% at least fair possibility of going



LUXURY ACCOMMODATION

% at least fair possibility of going



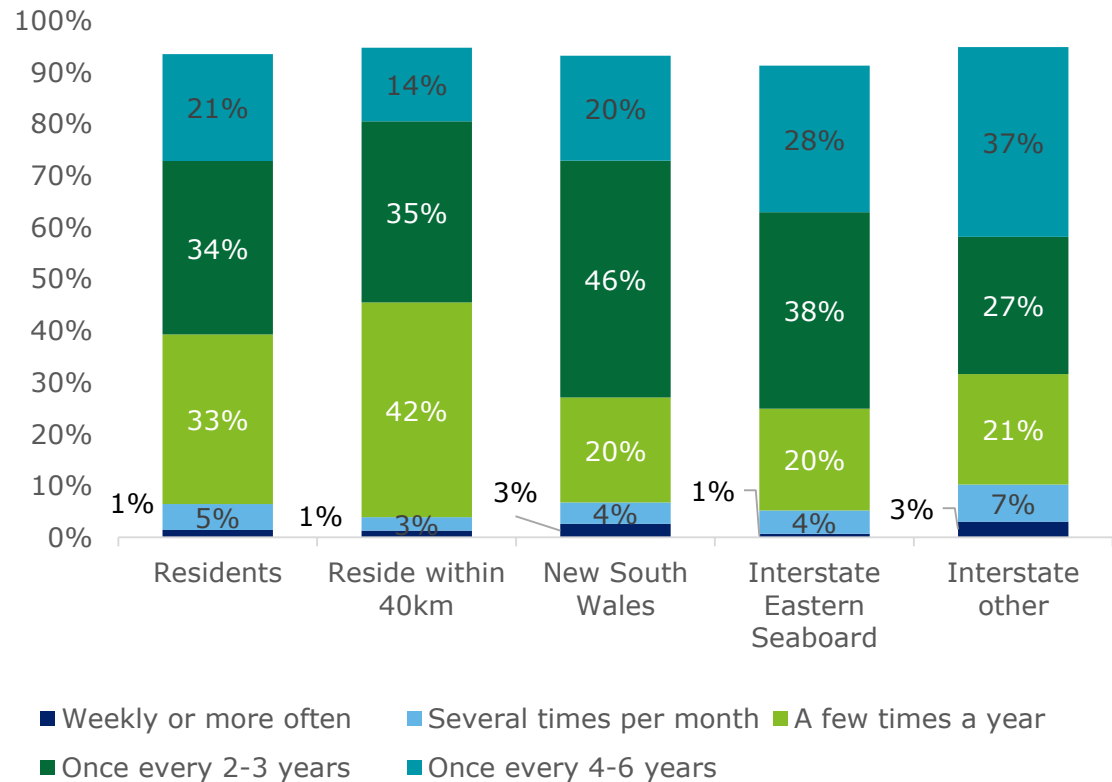
Those living closer are more likely to visit each offer if they weren't already planning to visit the BM

Once decided to go, those travelling further are more likely to visit both offers

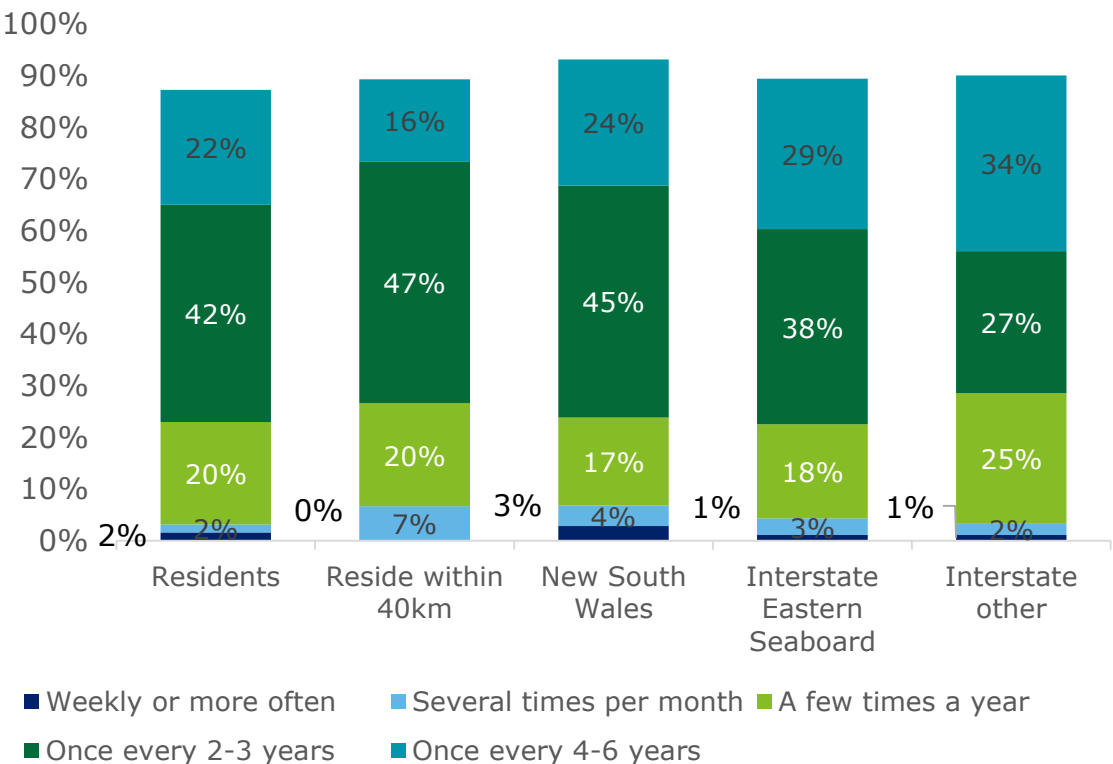
Source: Hall & Partners Audience Survey Sep 2020; C6.How likely is it that you would want to go/use each of these particular attractions in the Blue Mountains in the next 2 years? Base size: Reside within 40km (n=53) NSW (n=123) Eastern Seaboard (n=96) Interstate other (n=39)

Frequency of visitation

Wildlife Park

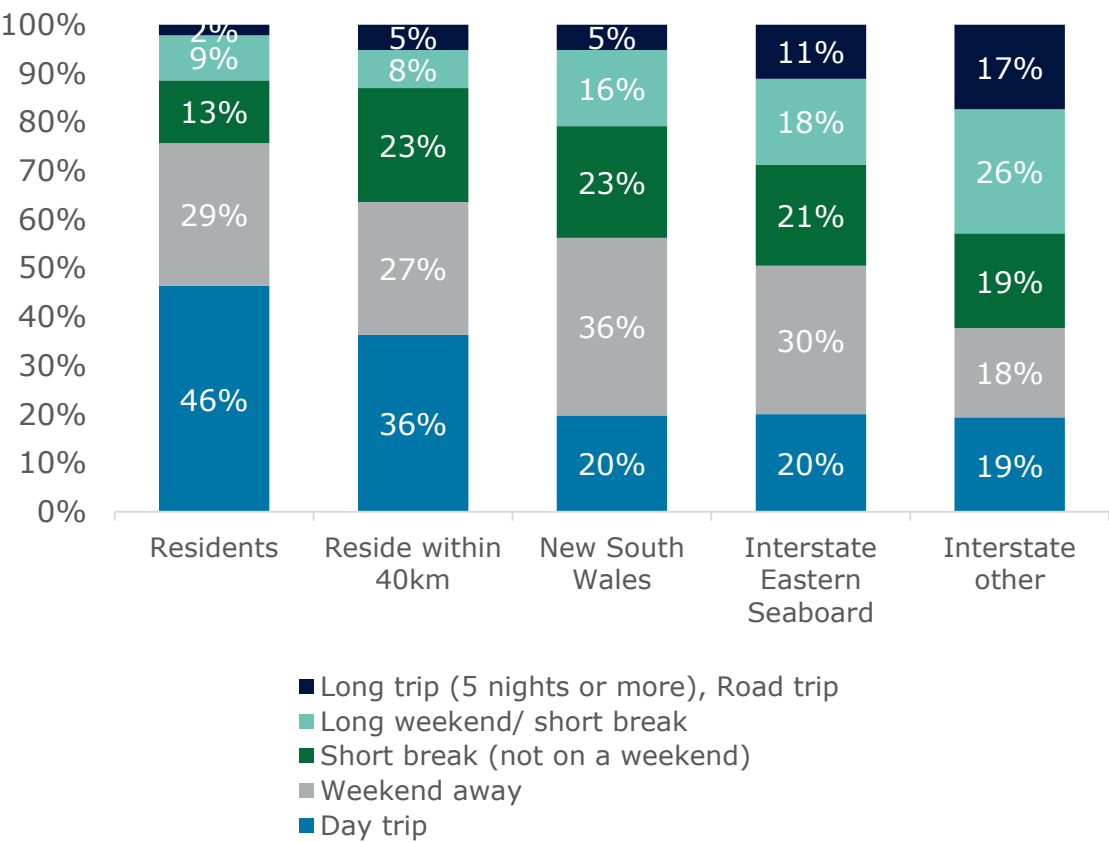


Luxury accommodation

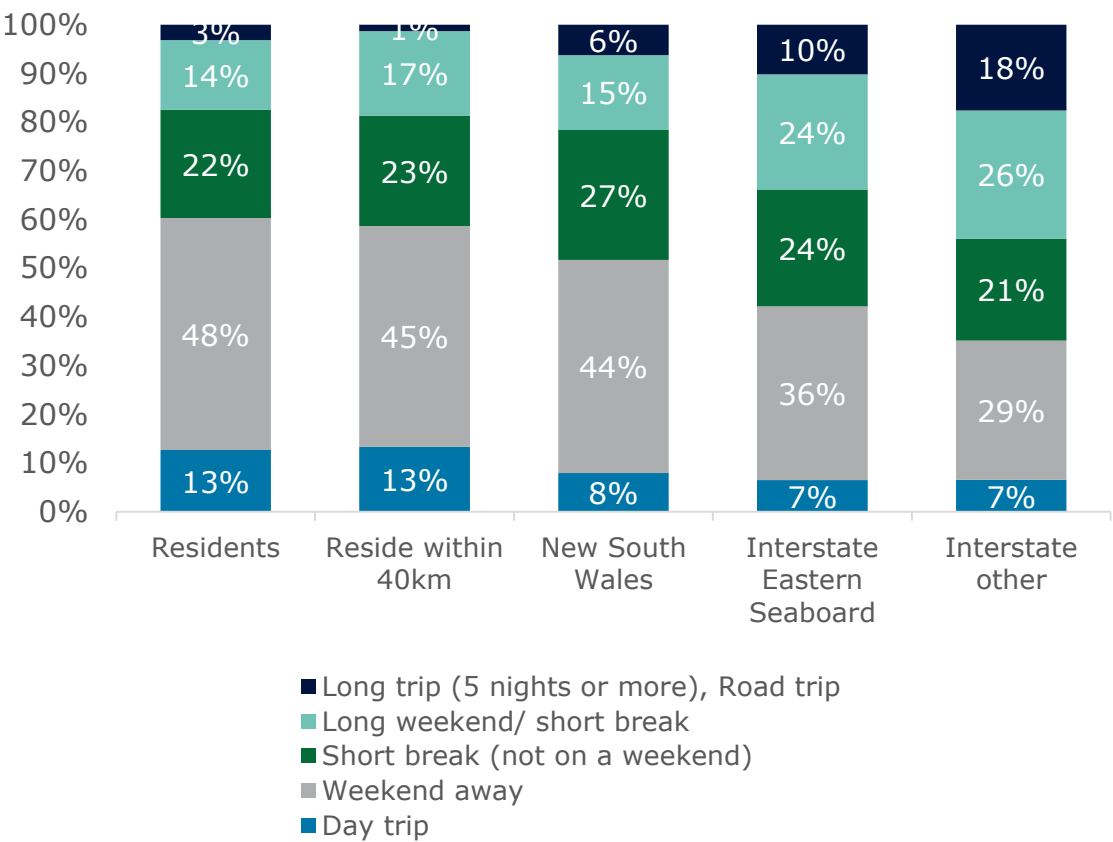


Trip Type

Wildlife park



Luxury accommodation



Park features

Assessing demand

Experiences

Interest

Experience – interest

- **Women** are more likely than men to want to visit for patting a koala (55% vs 41% men) and the wildlife hospital experience (38% vs 27%)
- **18-34 year olds** are significantly more likely to visit for snake and lizard handling (41% vs 21% total AU)
- Breakfast with the birds (48%) is more likely to convince residents than Australians generally.

Aboriginal Experiences

- **Residents** are generally more interested in all Aboriginal experiences than Australians as a whole; Dreaming experience and Aboriginal story telling experience significantly so.
- Around one in three (35%) would not participate in any **Aboriginal experience**.

Experience	% AU	% among Residents
Pat a Koala	48%	54%
Feeding Kangaroos and Wallabies	44%	51%
Breakfast with the birds	39%	48% ▲
Wombat - Close Encounter	38%	39%
Wildlife Hospital Experience	32%	36%
Walk with the dingos	31%	31%
Echidna- Close Encounter	32%	31%
Feeding a Crocodile	26%	30%
Zoo Keeper for the day	26%	28%
Snake and lizard experience/ handling	21%	27%
None of these	21%	14% ▼

Table: Experiences likely to drive visitation (% selected reason to visit)

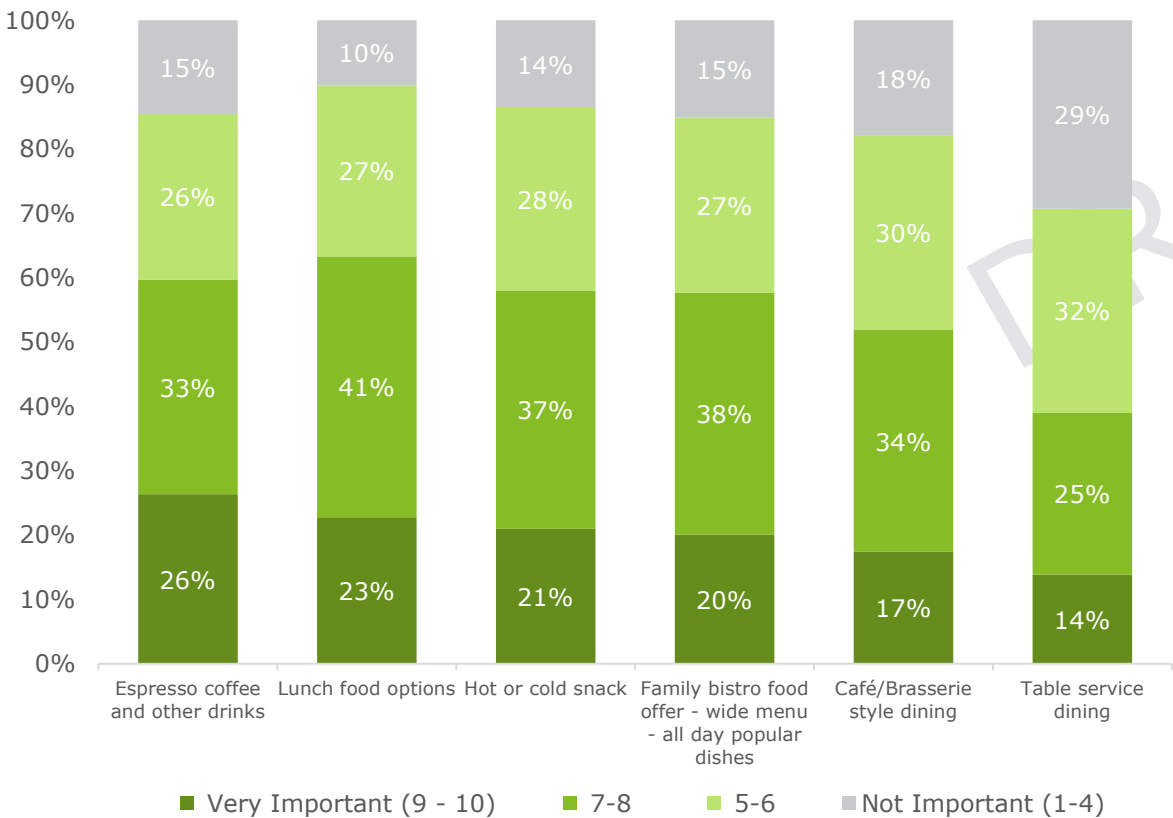
Experience	% AU	% among Residents
Aboriginal guided walks through the park	41%	44%
Aboriginal Bush Tucker experience	37%	43%
Aboriginal Arts and Craft Lessons	31%	28%
Aboriginal Dreaming experience	30%	38% ▲
Aboriginal Story Telling experience	29%	39% ▲
Aboriginal Land Management lessons	18%	21%
None of these	35%	28%

Table: Interest in participation (% selected)

▲ = significantly higher vs total Australians

Source: Hall & Partners Audience Survey Sep 2020; QF1- The development is proposed to include the following features. Which of these would make you more likely to visit, if any? Which of these would you be interested in participating in, if any? Base size: AU Total (n=751) Residents (n=162)

Amenities Importance



Espresso coffee attract the strongest interest with one in four rating it a 9 or 10 out of ten in importance.

Strong interest is consistently high among people aged 25-64 year olds (30% rating 9-10/10), while less important to the younger and older cohorts (17% rating 9/10/10 among 18-34yo and 21% among 65+)

Overall however, more people rate importance of lunch food options between 7 and 10 out of 10 (64% vs 59% Espresso Coffee and other drinks)

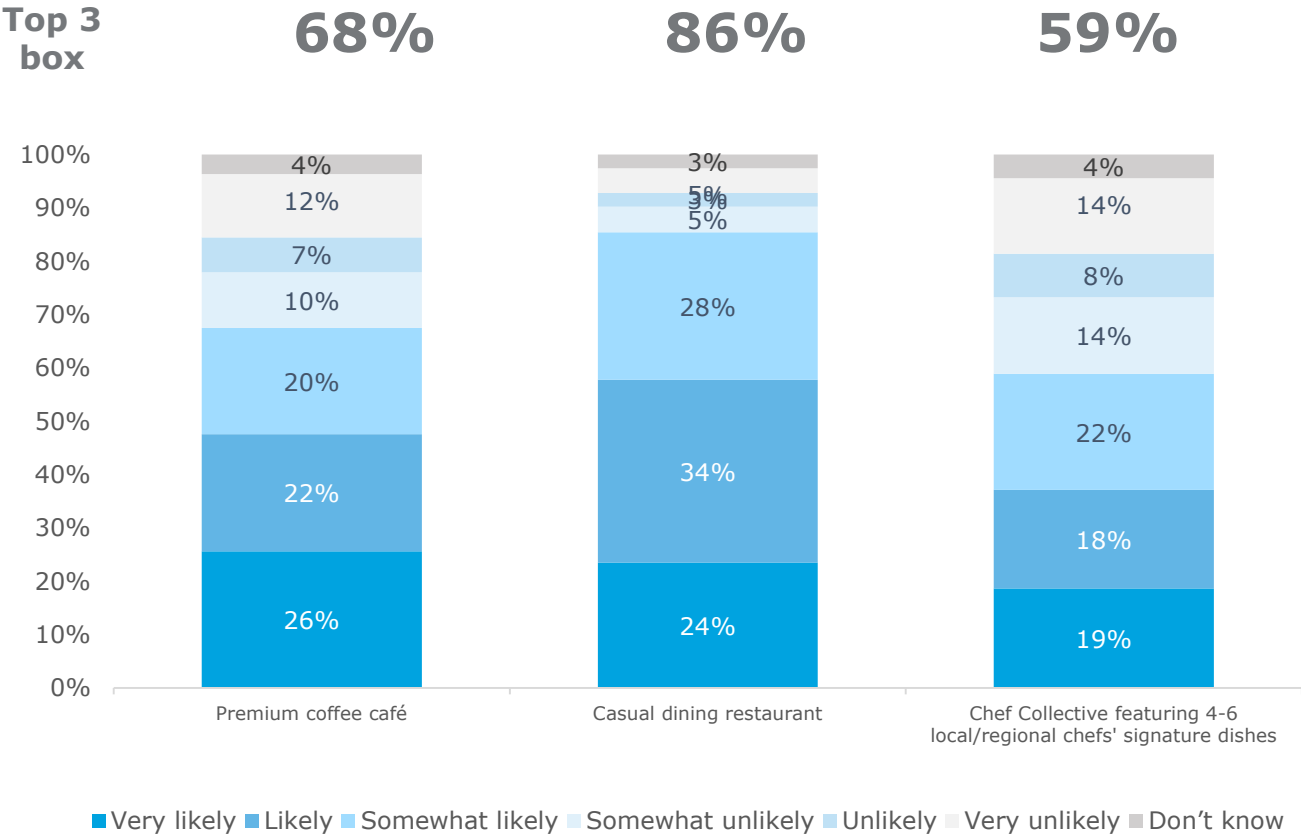
Rated importance does not differ significantly by residence.

Chart: Rated Importance of Amenities (10-point scale)

Source: Hall & Partners Audience Survey Sep 2020; QF4 How important would you consider the following amenities to your enjoyment of the Wildlife Park?
Base size: AU Total (n=751) Residents (n=162)

Likelihood to engage

Importance



Sydneysiders are particularly interested in premium coffee (58% vs 48% total AU), as are families (57%)

Chef Collective has more niche appeal - 25-34yo (50% vs 37% total AU) and men (43% vs 32% women) are most likely to engage

Source: Hall & Partners Audience Survey Sep 2020; Q How likely is it that you would use the following while visiting the Wildlife park? F5 How much would you be willing to pay for each of the following? (Maximum shown) Base size: AU Total (n=751) Residents (n=162)

Gastronomy Appeal

Gastro pub and wine bar

"GASTRO PUB"[^]

33%

Appealing/ Very appealing

Residents

36%

WINE BAR WITH CRAFT BEER/COCKTAILS

31%

Appealing/ Very appealing

31%

Significantly higher among:

Sydneysiders (48%)
25-34yo (42%)

Significantly higher among:

Sydneysiders (41%)
25-34yo (42%)
35-44 (41%)

The gastro pub and wine bar appeals to approximately one in three Australians.

The two gastronomy offers appeal to a similar age cohort, with a slightly older skew towards wine bar appeal.

[^] The concept was explained to the respondent hotel dining option instead of traditional hotel restaurant that offers high-quality fine dining options

Source: Hall & Partners Audience Survey Sep 2020; QF7 - How appealing do you consider each of the following, if you were to visit the hotel area to the Park? Base size: AU Total (n=751) Residents (n=162)

Pricing analysis

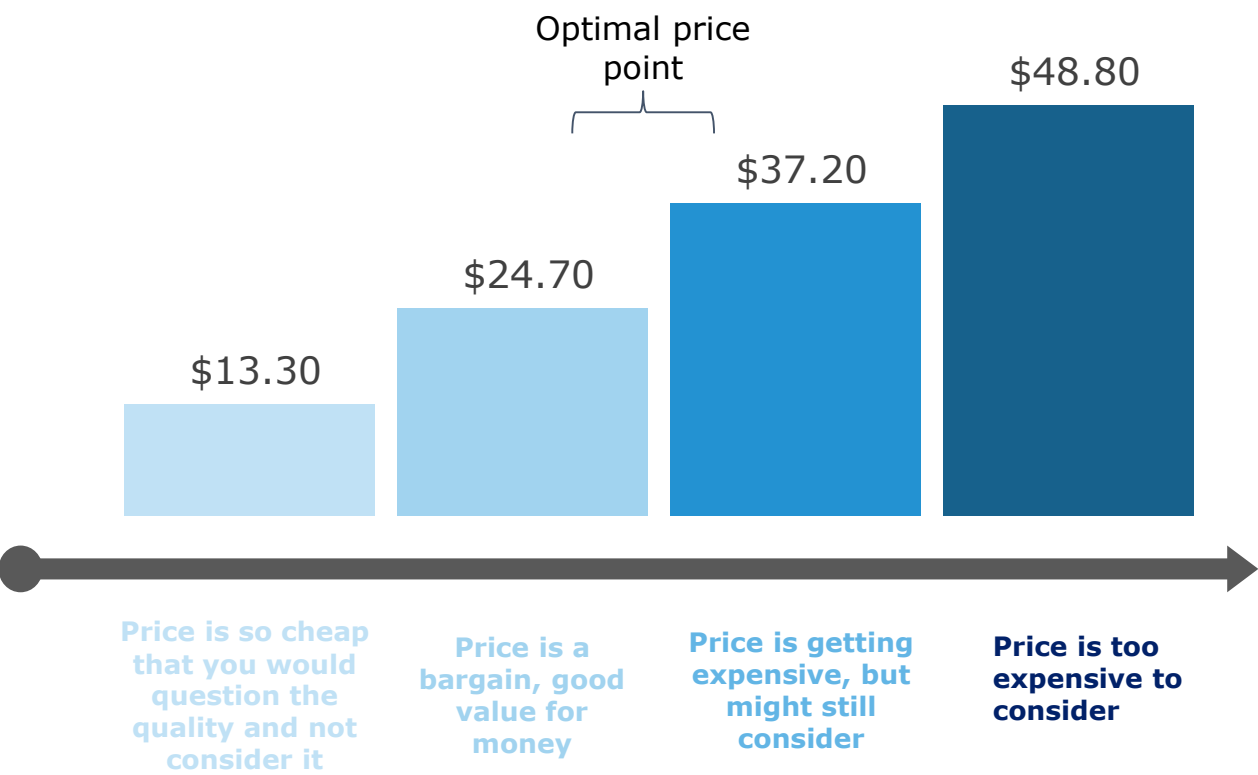
Determining the optimal price point from the consumer perspective

Price sensitivity

Entry fee – price per person, wildlife park

Residents

\$13.8 \$25.7 \$37.0 \$48.4



Source: Hall & Partners Audience Survey Sep 2020; Base size: AU Total (n=751) Residents (n=162)



Price per night – Luxury accommodation

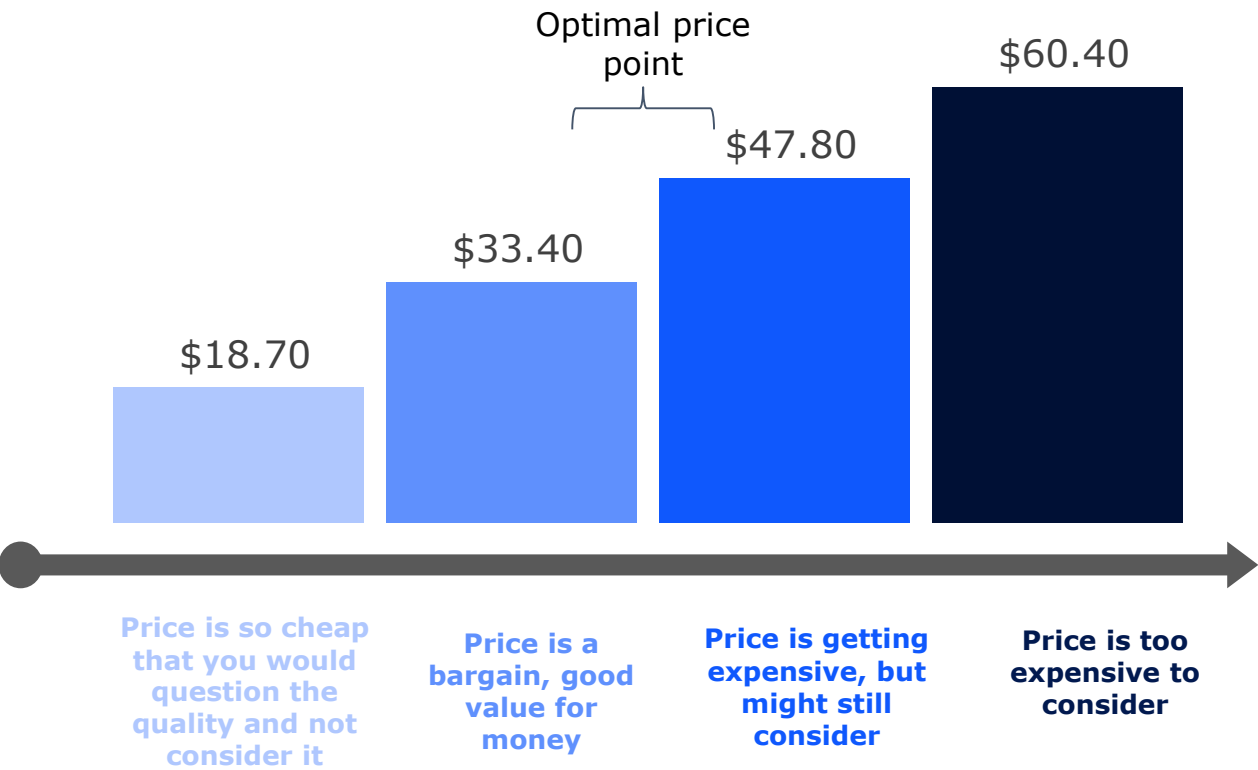


Price sensitivity

Price per meal

Residents

\$18.2	\$28.6	\$41.7	\$48.6
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Source: Hall & Partners Audience Survey Sep 2020; Base size: AU Total (n=751) Residents (n=162)



Key takeaways & thought starters

- The **Blue Mountains** has high awareness and a good reputation among Australians, but distance, high perceived cost and being too touristy are barriers to visitation among Australians, particularly outside NSW
 - Families and couples from Sydney are the lowest hanging fruit to drive visitation to the development
 - The older demographic among whom awareness and past visitation is highest, are least compelled to go again
 - The region appeals with **scenery, relaxing atmosphere and hikes**, but also has luxury associations among one in four- while a great fit for the current concept, a watch out to avoid alienating families or the lower income demographic
- **Wildlife park** and **food and beverage** have potential to convince residents and non-residents, however there is a need to remain realistic on how many people will actually visit and how often, as conversion to likelihood to visit is considerably lower
 - Repeat visitation of the wildlife park will likely be relatively low outside of families
 - Communicating distance and cost barriers will be vital to convince.
- The **food and beverage** offer appeals with perceptions of variety but as the concept currently stands, many people have difficulty to understand what they will be getting. Some are turned off by lack of authenticity and ideas of buffets while other are anticipating a lack of choice to cater for different dietary needs (which however could be mitigated through successful communication)
- The **luxury accommodation** should be clearly delineated from the other offers to avoid alienating visitors to the wildlife park and food and beverage offer and will need a particular 'strong' sell on the luxury component to warrant high price point

Key takeaways & thought starters

- **Aboriginal experiences** and the wildlife hospital have potential to offer point of difference, especially among families and women. Classics such as patting a koala and feeding native wildlife will please the masses but should not be the focus of communication
- **Gastro pub** and **casual dining** have broader appeal than fine dining and cocktail bars, so highly targeted communication is recommended to separate from wildlife offer.
- **Affordable luxury** should be primary focus of communication to clearly distinguish offer from Featherdale and accommodation such as Hydro Majestic. The audience currently does not yet see the USP sufficiently.

The logo for Hall & Partners is centered on a solid green background. It consists of the text "Hall & Partners" in a dark blue serif font. The ampersand is a stylized green symbol. The text is contained within a white, irregular speech bubble shape that has a small tail pointing downwards and to the right.

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