Merewether Baths

NEWCASTLE

DESTINATION MANAGEMENT PLAN

FINAL REPORT

June 2013

EXECUTIVE SUMMARY

The NSW Government recognised the importance of managing the growing Visitor Economy through Destination Management Planning in the Visitor Economy Industry Action Plan for NSW (2012). In setting the ambitious target of doubling of visitor expenditure by 2020 the Government called on each region to prepare a Destination Management Plan (DMP). Destination Management Planning provides a tourism organisation with the tools to produce sustainable and competitive visitor economy in a destination. Each DMP needs to demonstrate their contribution to achieving the 2020 target through management, development and promotion of its unique assets.

A. Destination Analysis

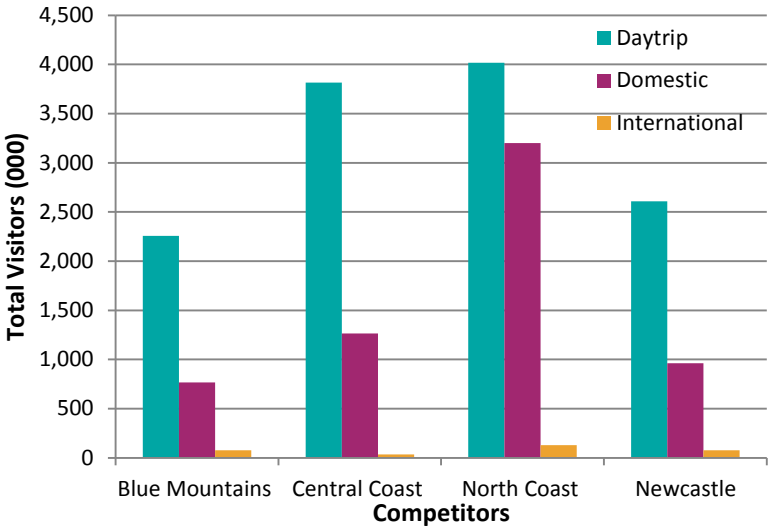
Newcastle, the heartbeat of the Hunter, and the only regional Australian city simultaneously on the beach and the harbour waterfront, is only a short 2 hour drive from Sydney. Newcastle's **stunning beaches, laidback lifestyle, fascinating harbour and eclectic arts scene**, are shining through the shadow of an **industrial heritage**.

A top ten city in Lonely Planet's 'Best in Travel 2011' guide, Newcastle is a city of rich history, quirky culture and amazing scenery.

Newcastle's population currently sits at **156,533 residents** and is **projected to increase to 180,640 residents by 2036**, which equates to a 15% increase from 2012. As of June 2012, the Australian Bureau of Statistics also listed Newcastle as having one of the highest population densities in NSW (excluding Sydney).

In 2012 (YE Dec) Newcastle received approximately **962,000 domestic overnight visitors, 2,609,000 daytrip visitors, and 75,300 international visitors**, which equates to 44% of domestic overnight, 49% of domestic daytrip and 66% of total international visitors to the greater Hunter in 2012.

Figure A: Newcastle Visitation Trends Against Competitors



To grow and prosper as a destination, it is recommended that the following emerging markets be considered as key target areas for growth of Newcastle's visitor economy:

- Education
- Visiting Friends and Relatives (VFR)
- Events
- Sports
- Cruise
- Medical
- Overnight Short Breaks
- Drive

EXECUTIVE SUMMARY

B. Destination Direction

VISION

A visitor economy vision for a destination needs to be clear, concise and leverage the unique selling points of the region. Taking the above considerations into account, the visitor economy vision for Newcastle is:

Newcastle is making history – not waiting for it to happen.

MISSION

The visitor economy mission for Newcastle is:

Create a unique invitation to come and then give visitors awesome experiences to talk about to their social and community network.

GOALS AND OBJECTIVES

1. Increase average length of stay
   Measure: increased visitor nights
2. Increase spend per day and overall value of the Visitor Economy
   Measure: increased visitor expenditure
4. Double the amount of positive social media about the destination
   Measure: Double amount of Visit Newcastle Facebook page 'likes'
5. More supportive and positive local advocates for their city and the visitor economy
   Measure: Increased VFR visitors through more supportive and engaged locals

STRATEGIC PRIORITIES

There are four strategic priorities each with a number of actions and one catalyst project, they are:

1

A unified voice for the businesses engaged in the Visitor Economy

Catalyst Project: *Establish an industry-led peak body for Newcastle that speaks on behalf of a range of existing organisations to encourage a single voice for industry advocacy and where possible consumer messaging*

2

Get the industry connected

Catalyst Project: *appoint mentors to assist industry to package and engage in the distribution system in preparation for major events*

3

Engage the global social and community networks that love our experiences

Catalyst Project: *Invest in targeting social media campaigns that target influencers in emerging global social and community networks to become advocates / ambassadors for Newcastle with a focus on leveraging events.*

4

Create signature experiences: starting with the East End

Catalyst Project: *Develop an East End Visitor Economy Masterplan to prepare for the post-rail closure that looks at precinct linkages, visitor safety, interpretation and iconic project attraction*

Table of Contents

ACRONYMS

ALOS	Average Length of Stay
BIAs	Business Information Associations
TCoN	The City of Newcastle
NSW	New South Wales
NTIG	Newcastle Tourism Industry Group
RET	Department of Resources, Energy and Tourism
RDA	Regional Development Australia
TRA	Tourism Research Australia
VFR	Visiting Friends and Relatives
YE	Year Ending

Acknowledgements

On behalf of the EC3 Global team, we would like to thank you for the opportunity to work with you to prepare the Newcastle Destination Management Plan.

Images used throughout this DMP are courtesy of Destination New South Wales.

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EVALUATE COMMUNICATE EVOLVE

Section 1 - Background

King Edward Park

WHAT IS THE VISITOR ECONOMY?

Introduction

In 2011 the NSW State Government established the Visitor Economy Taskforce to develop a strategy to overnight visitor expenditure to NSW by 2020. In commissioning the Taskforce, the State Government was motivated by a series of concerns relating to the perceived strategic stagnation of tourism in the State and the multiple impacts of that stagnation – in concert with a range of factors including the high Australian dollar – on the viability of the industry and its long term contribution to the State and regional economies.

In its final report to the State Government, the Taskforce enunciated a powerful agenda for change predicated on a series of "musts" including:

Increase visitation, grow physical capacity, renew and revitalise destinations, improve the visitor experience, increase visitor spend, make Sydney and NSW more competitive, and change the mindset of Government and Industry.

The State Government embraced the findings of the Report and set in place an action plan to drive a new paradigm that moves beyond tourism to a new and wider focus on the "visitor economy".

What is the Visitor Economy?

According to the Visitor Economy Taskforce, the term "visitor economy" takes into account "**broader economic activity than what has been historically defined as tourism and events**". It encompasses the direct and indirect contributions to the economy resulting from a person (a 'visitor') travelling outside their usual environment for holiday, leisure and events and festivals, business, conventions and exhibitions, education, to visit friends and relatives and for employment in NSW.

This new focus forces a broad strategic focus beyond marketing to every facet of experience creation and capacity building that contributes to the creation and sustaining of a viable and growth oriented visitor experience. Foci such as transport infrastructure, place management, cultural development, information technology, broadband, sports, human resource availability and skills, are all brought into the mix and create challenges and opportunities that need to be addressed by a coalition of stakeholders.

This is a very different approach to traditional approaches based predominantly on often disjointed and under-funded marketing campaigns and the operation of Visitor Information Centres. It requires a new approach and very different mindsets.

The Newcastle Response

The Regional Tourism Organisation for Newcastle and the Hunter region (Tourism Hunter) has responded proactively to the State Government initiative and has resolved to enter into discussions with Hunter Councils (including The City of Newcastle) on the creation of a new regional entity within the broader organisational framework of Hunter Councils.

The purpose of this document is to outline how this might be achieved and how The City of Newcastle could partner with the wider tourism/visitor economy sector to drive regional performance

Excerpt from Visitor Economy Hunter: Position Paper, Hunter Councils

Economic Benefit to Newcastle's Economy

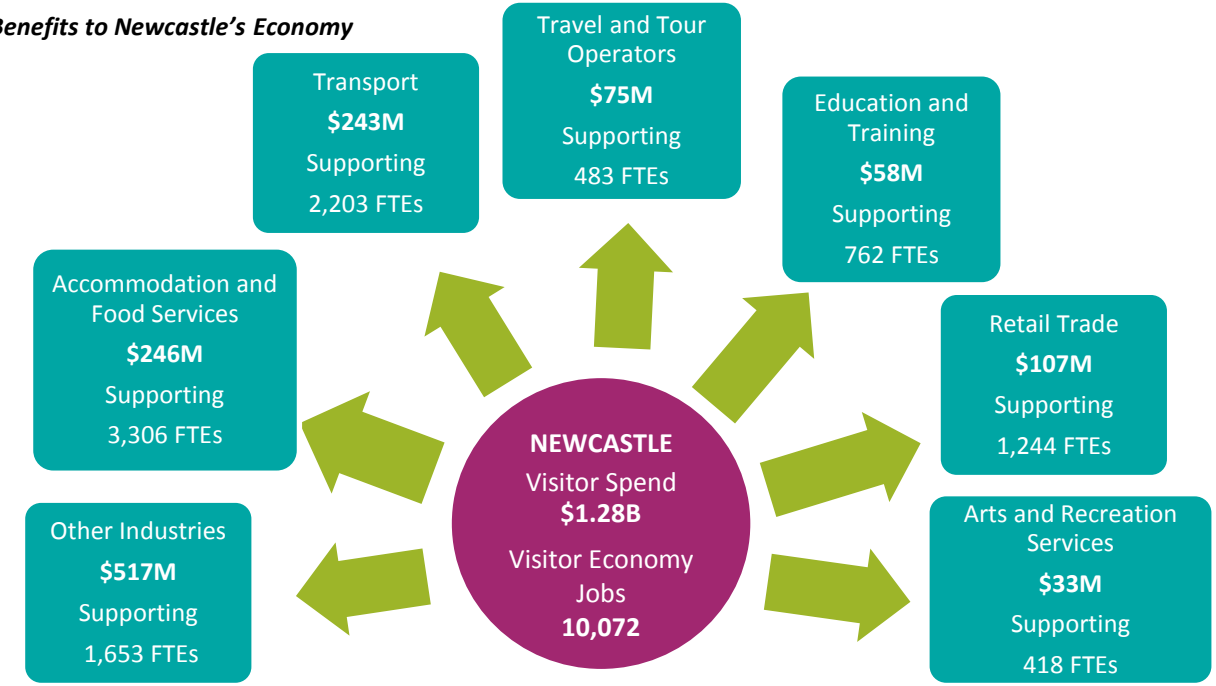
Visitor expenditure impacts a number of sectors in the economy. Visitors inject $722 million of direct expenditure into Newcastle's economy which contributes to almost $1.3 billion of indirect expenditure across the sectors including retail, transport and education.

In Newcastle, the visitor economy directly and indirectly contributes to 10,072 jobs. For every $72,000 of visitor spend in Newcastle, one full time employee (FTE) is created.

An increase in visitation and subsequent visitor spend does have direct positive impacts to local and regional employment figures.

Figure 1 below shows the direct impact of visitors on the region's economy starting with direct expenditure and jobs and where that money is spent based on estimates from the National Tourism Satellite Accounts prepared by Access Economics.

Figure 1: Visitor Benefits to Newcastle's Economy



NOTE: These measurements of visitor economy value across sectors have been extrapolated based on the professional estimates of EC3 Global, using the national data outline in the Tourism Satellite Accounts (prepared by Access Economics).

Key Markets of the NSW Visitor Economy

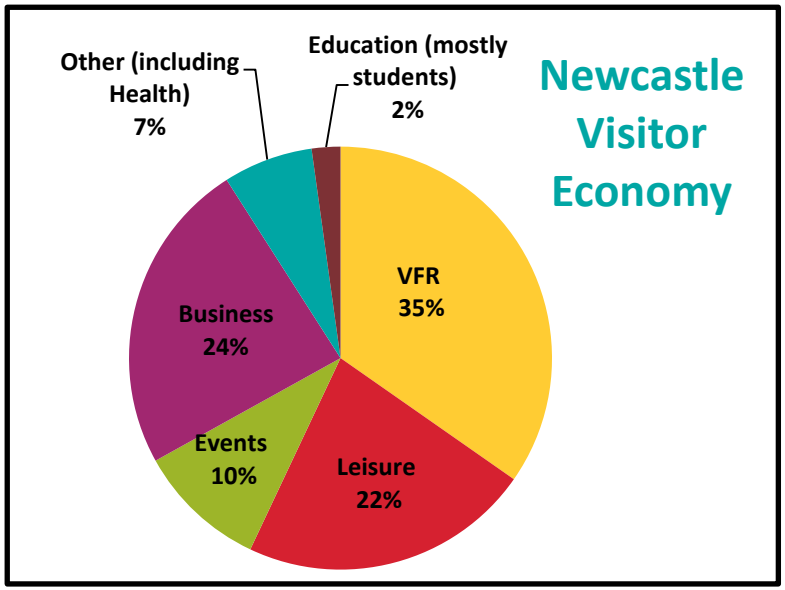
Business (15%)

VFR (33%)

Education (1.3%)

Events (10%)

In comparison to the State segments, Newcastle has higher VFR and Business markets and a lower proportion of leisure visitors (see below).



Regional NSW

Sydney-based

Interstate

International

Leisure (37%)

Medical/Health

Personal Business

Military

Other (4%)

What is a Destination Management Plan

Destination Management Planning provides a visitor economy organisation with the tools to produce a sustainable and competitive destination. It is organised around a destination's unique visitor economy assets, and unique development, marketing and management needs.

Destination Management Planning is a step forward from traditional destination marketing roles and provides a more holistic and integrated approach to understanding the visitor economy potential of each destination, and the best methods of maximising that potential.

The difference is made in open and honest communication, matching people in the visitor economy network to the trends and opportunities and by prioritising our efforts.

Destination Management Plans (DMPs) are developed after a comprehensive process of research within the destination, including consultation, feedback, planning, and review. Grass roots level participation from local tourism organisations, tourism boards, local government, and operators is essential in the preparation of DMPs. DMPs should be linked upward to State/Territory level strategic visitor economy plans.

Destination Management Planning is an evolution of the destination marketing initiative and represents a more integrated approach to understanding destination needs and the delivery of services. It is intended the DMPs will directly link with Tourism NSW's annual business plans and provide a strategic platform to guide the strategies and business plans of industry stakeholders.

Key Characteristics of a Destination Management Plan:

Best practice DMPs establish a vision and set strategic objectives that:

- Clearly contribute to achieving the vision
- Are realistic, achievable and measurable
- Take a holistic and integrated approach
- Identify global forces that may impact the destination
- Include short, medium and long-term activities
- Deliver economic benefits
- Align with community aspirations
- Strengthen environmental management
- Facilitate continual improvement and capacity building
- Encourage innovation and facilitate collaboration
- Support the development of risk management
- Encourage political will for an ongoing, progressive and innovative approach
- Are clearly communicated

Source: ARTN Guide to Best Practice Destination Management,

Destination Management Planning

The City of Newcastle has developed this Destination Management Plan to harness the regions unique selling points and unlock future funding opportunities. The Visitor Economy recognises this is **more than just 'people on holidays'** and that the **Visitor Economy is helping the community to achieve its goals**. Wide stakeholder consultation has been undertaken and now buy-in to the recommendations is needed in order to ensure commitment to taking forward key actions.

The Newcastle Destination Management Plan will be the **strategic plan for** the destination's visitor economy (not the Council) and the **vision, goals and strategies** for the destination in this document aim to provide a direction to all partners in the Visitor Economy. The Destination Management Plan (DMP) is essential for the sustainable and profitable growth of the destination's visitor economy, providing a **central reference point** for the development and delivery of visitor economy product and services and the implementation of marketing strategies.

Planning and implementing best practice for sustainable regional tourism destinations can contribute to regional economic development, conservation of natural, built and socio-cultural environments, community well-being, and exceptional visitor experiences.

- Sustainable Regional Tourism Destinations, STCRC (2010)

Benefits of Destination Management Planning

The potential benefits for destinations, communities, business operators and visitor economy agencies that can be achieved through an effective and nationally consistent approach to DMP include:

Improved destination competitiveness	• Increased destination appeal resulting in increased visitation and yield • Advantage over other destinations • Ongoing investment in the visitor economy
Increased visitor satisfaction	• Delivering on the brand promise • Increased repeat visitation • Enhanced destination reputation
Economic, social and environmental sustainability	• Increase in visitor's contribution to destination's economy • Community support for development • Minimising the visitor economy's environmental impacts • Long term industry viability • Strengthening the unique socio/cultural characteristics of the city
Effective partnerships	• Strong partnerships (community, industry, government, development agencies etc) • Avoiding duplication of resources • Bringing a focus to developing the full visitor experience from arrival through to departure • Increasing the profile of the visitor economy in regional destinations • Minimising conflicts between the visitor economy and other sectors
Continuous improvement	• This framework encourages the implementation of DMP as a process of continuous improvement rather than a once off "set-and-forget" activity. The benefits include: ➢ Awareness of emerging trends ➢ Development of innovation and new technology ➢ Re-engaging visitors in the destination brand ➢ Socio/cultural sustainability

Section 2 – Destination Analysis

Newcastle Marina

Destination Footprint

Newcastle, the heartbeat of the Hunter, and the only regional Australian city simultaneously on the beach and the harbour waterfront, is only a short 2 hour drive from Sydney. Newcastle's stunning beaches, laidback lifestyle, fascinating harbour and eclectic arts scene, are shining through the shadow of an industrial heritage.

A top ten city in Lonely Planet's 'Best in Travel 2011' guide, Newcastle is a city of rich history, quirky culture and amazing scenery.

Destination Perceptions

Visitors may perceive the boundaries of Newcastle reach further than the defined LGA, to include everything within the freeway, Charlestown, Lake Macquarie, Swansea Bridge, Raymond Terrace, Newcastle Airport, Toronto and many areas in the Hunter Valley Wine Country and other nearby regions.

It has been noted that outlying residents may also categorise themselves as living in Newcastle, especially when travelling to other destinations, which may reflect a wider, more inclusive boundary as seen by consumers.

International visitors may have a different perception of Newcastle dependent on the purpose for their visit; this may be influenced by involvement in industry, the travel method used to arrive in Newcastle, or a personal relationship with the region. As many of Newcastle's international visitors may also be students, an involvement with the University of Newcastle or Hunter TAFE could also create additional perceptions of the destination.

As a visitor economy hub, Newcastle provides a base to explore a broader area stretching to Port Stephens, Lake Macquarie, both Upper and Lower Hunter, the foothills of the Barrington Tops and the Hunter Valley Wine Country.

Figure 2: Destination Map

The city of Newcastle has an enviable position, resting on a peninsula bordered by the magnificent working harbour and spectacular surfing and swimming beaches.

- Newcastle Visitor Guide

Source: www.visithunter.com.au
Source: www.visitnewcastle.com.au
Source: Hunter Regional Plan 2012-2022, NSW Government
Image Source: http://svc066.bookeasy.com/images/newcastle/locationguide.pdf

KEY STAKEHOLDERS

Outlined below are the key partners in the City of Newcastle's Visitor Economy:

BUSINESS IMPROVEMENT ASSOCIATIONS (BIAs)

From the city centre and across the suburbs, Newcastle contains many commercial centres. Each centre contains different mixes of businesses, residents and visitors, but all centres would like to optimise their character and commercial prosperity through a coordinated approach to economic development. To help achieve these aims, Newcastle's Mainstreet Program was established in the early 1990's. Under this model, Newcastle City Council collected a special benefit rate from businesses within each commercial centre to pool funds for economic development. Local businesses then formed Committees of Council to determine programs that used the funds to deliver improved economic benefits to their commercial centre.

Between 2011 and 2013 the City of Newcastle and the participating commercial centres created an alternative model that has changed to being an independent Business Improvement Association (BIA), governed by a Constitution. Council continues to collect the special benefit rate, and through a Funding and Service Agreement with each Commercial Centre, Council passes the levied funds from each commercial centre onto each association. Given Council's role as the collector of the special benefit rate, it remains the overall manager of the operational framework for the local BIA network.

It is anticipated that each BIA will work closely with relevant Council staff, to draw on relevant expertise and assist with an integrated approach to the overall economic development of Newcastle. The BIAs may work with a range of partners including their business based members, corporate sponsors and subcontractors to the BIA's.

Business Improvement Associations had been established for four commercial centres within the Newcastle local government area:

- Newcastle City Centre (also managing the Darby Street precinct)
- Hamilton
- Mayfield
- Wallsend

NEWCASTLE TOURISM INDUSTRY GROUP (NTIG)

The Newcastle Tourism Industry Group (NTIG) is Newcastle's peak tourism industry body and Local Tourism Association which aims to:

- Provide a unified voice that promotes the development of tourism in Newcastle
- Maximise industry participation in tourism planning, development and marketing
- Educate all businesses that tourism is everybody's business

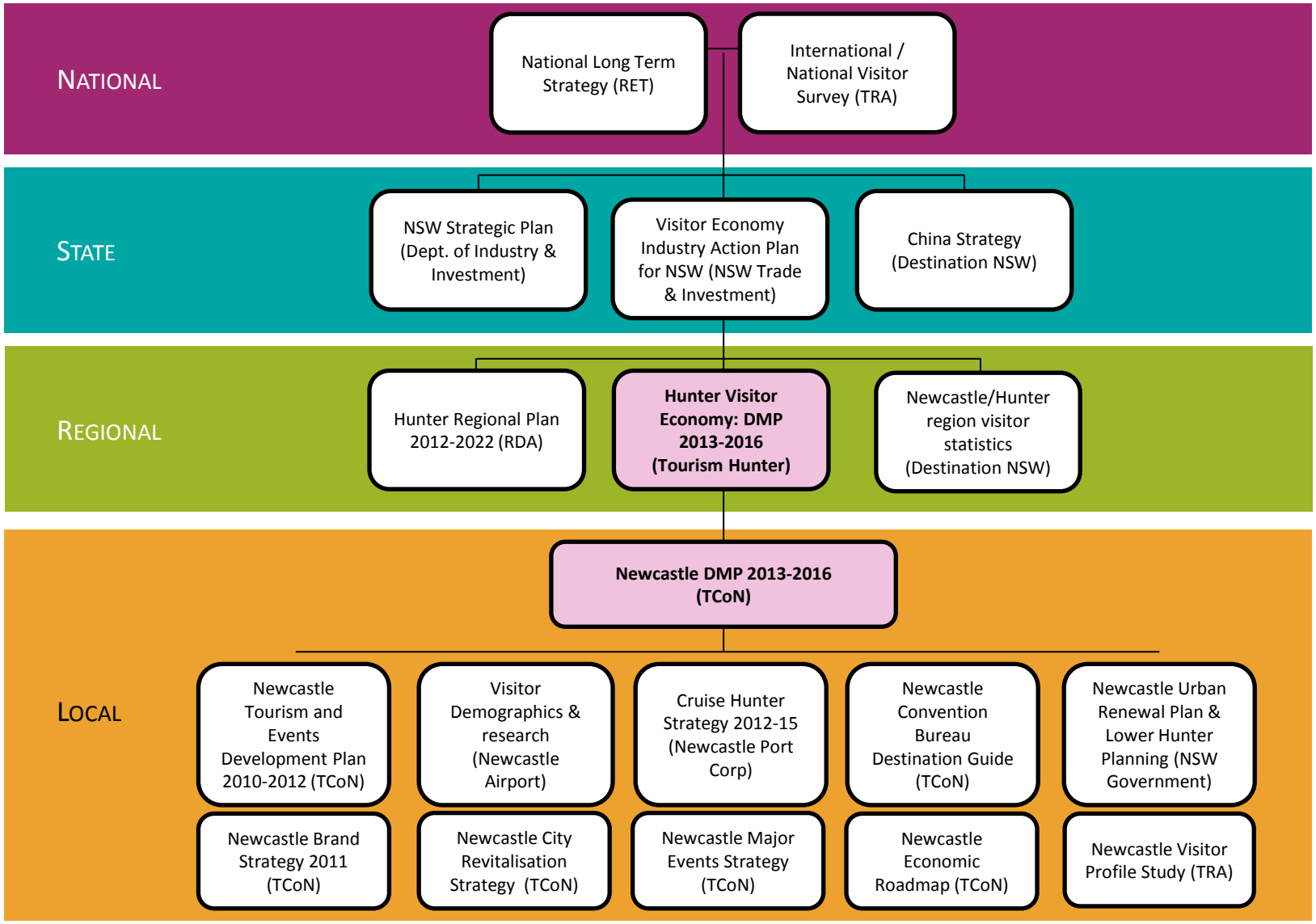
Since they launched in 2010, NTIG has quickly grown to have over 100 members. Their membership base represents every facet of tourism operators; including accommodation, function venues, transport, tours, attractions, events and restaurants. NTIG also has members from many sectors that service tourism operators, including media, marketing and business consultants.

Organisations benefit from NTIG membership by becoming part of their network, to benefit from opportunities to grow their business and to solve common problems together. NTIG provides a unified voice to influence the direction of tourism in Newcastle.

NTIG is part funded by The City of Newcastle.

A complete list of stakeholders consulted during the DMP Process can be found in Appendix 1.

Key Data and Documents



SWOT Analysis

Strengths	Weaknesses
• Proximity to Sydney • A diverse range of visitor attractions from beaches to historic sites • A vibrant economy as one of the world's largest coal exporters • Expansion of infrastructure and services from the Newcastle Airport and a strong cruise sector • Established events and supporting infrastructure to attract international quality sporting and cultural events • Expansion of the University of Newcastle and the growing education sector	• Reducing financial support for visitor economy from all levels of Government • Lack of distribution partners • Lack of product packages • Lack of market ready or export ready product • Shortage of accommodation • Poor marketing collateral and online presence • Proximity to Sydney for international markets, many don't stop as a result • Community support and awareness of the visitor economy • Lack of expertise in reaching and appealing to a wider Asia market (e.g. quality shopping experiences)
Opportunities	**Threats**
• Attracting national and international sporting and cultural events through a focussed and funded events attraction strategy • Building new markets including those from Asia, through better air service connections to key hubs and the education sector • Growing Visiting Friends and Relatives (VFR) travel both from interstate and overseas • Leveraging the growth of the airport to access new domestic markets • Continuing to strengthen the destination as a cruise port including the potential to regain base porting operations • Building the business and conference market supporting a future investment in a Convention Centre • Developing an asset register for the City and its wider environment • Develop and grow the event sector	• Increase presence from the resource industry within the region has impacted availability of accommodation for visitors • Decline or slow return to growth of key long-haul international markets • Reduced funding from Council for visitor economy

Unique Selling Proposition

The Newcastle region has a wide range of both active and passive experiences all of which contribute to the destination's unique selling proposition. These experiences are what make a visit to Newcastle special and play a major role in deciphering the region's competitive advantage and identifying emerging markets.

Nature -based
- Nature Parks and Reserves (e.g. RAMSAR wetlands)
- Beaches
- Walking Trails
- Outdoor Adventure Activities

Events and Festivals
- Surfest
- This is Not Art Festival (TINA)
- Newcastle Writers Festival

Sporting Events
- Hunter Stadium (e.g. Knights)
- British and Irish Lions Tour
- Asia Cup
- Race Days

Adventure
- Mountain Biking
- Kayaking
- Sky Diving

Water-Based
- Cruises
- Fishing
- Surfing
- Sailing/Wake boarding/ Windsurfing

Culture and Heritage
- Galleries
- Heritage buildings
- Boutique shopping
- Fort Scratchley
- Newcastle Museum
- Civic Theather

Education
- University of Newcastle
- Hunter TAFE





Key Assets

Taking into account an audit of current experience, product, attraction and service offering and feedback from consultation with key stakeholders, the following ten assets have been identified as the region's best.

Key Asset	Description	Consumer Appeal	Gaps
Community Coastal Infrastructure (e.g. Bathers Way)	Scenic walks along Newcastle's oceanic stretch.	Ties the coastline together and creates a sense of ease and connection.	Lack of viewing areas. Access points from trains, car parks, etc.
The Harbour	Social Hub - Includes working harbour, Honeysuckle dining, recreation, history & tours/attractions.	Ties together consumer activities & daily local life with visitor attraction.	Need to activate Nobby's and take more advantage of Ft. Scratchley as a feature experience.
Interconnectivity & city mobility	Most city assets are connected via foot paths and transportation links making it easy to move from one attraction to another.	Unique asset that it is a connected space, which links the beach to the harbour and CBD. Ample mobility for visitors.	Private operators (outside of taxis) to offer options on inner city transport such as bike hire or local guided tours. City guides / volunteers to be expanded.
Eco Tourism & its proximity to urban development	Within 20 minutes of the CBD (urban area with great café culture) are natural features, including Lake Macquarie, sand dunes, wetlands and Blackbutt reserve. Easy access (7km) to the Hunter Estuary Wetlands (RAMSAR listed).	Allows them to experience an urban holiday and eco adventure in one visit.	Necessary to further steps to create appealing packaging. Glenrock, Stockton Wetlands and other sites need further infrastructure. Need to improve communication between stakeholders and other LGAs to further develop these attractions.
Heritage and History	Throughout the city are heritage listed architecture and historical places.	Visitors can see this via various Tours or the Newcastle Tram – taps into the cultural visitor.	These features are fragmented and there is not one "Heritage" precinct (ie Rocks District in Sydney). Need to develop East End.
Top quality sporting and recreational facilities	A 33,000 seat, multi-purpose outdoor stadium plus over 50 local and regional sports facilities and many recreational facilities.	Ability to enjoy nationally competitive sporting events in a vibrant city.	Need to develop this area into the Sports Hub. The bones are in place, it just needs development.

Key Assets (Cont)

Key Asset	Description	Consumer Appeal	Gaps
Education (e.g. University of Newcastle)	Internationally recognised world leader in research and key asset in attracting educational visitors. Local campus already attracting 17,500+ students.	Highly regarded facility with good international reputation. Expansion in city centre will assist in change of inner city profile.	International/out of town students feel left out, intimidated by the City due to a lack of understanding, lack of appropriate accommodation, gap in communicating activities for students and VFR.
Rail and Transport including Newcastle Airport	CityRail and CountryLink connect to Sydney and regional NSW, intercity busses. Local transport network focussed on local needs only. Airport offers access to Sydney, Brisbane and Melbourne markets through major airlines. Further access to regional destinations through REX and Brindabella.	Intercity rail trip from Sydney is very attractive but lacking necessary rail infrastructure and speed to appeal to the wider visitor economy market. Airport provides direct link to international transfers via Sydney, Melbourne and Brisbane. Domestic transfers also available and well patronised for increasing business market.	Rail needs upgrades/ refurbishments to attract desired visitor economy based patrons. Bus and train interchanges identified as necessary. Airport facilities undergoing $80 million transformation to cater for international market and domestic transfer opportunities.

* Please refer to Appendix 2 for a complete Product Audit.

Key Imagery and Footage

The most effective way to market the City of Newcastle as an enjoyable destination to visit and stay is through the positioning of powerful imagery and footage that depicts the region's key assets and selling points.

Promoting the region through a new perspective will help entice new visitation and potentially reinvigorate repeat visitation.

To help achieve this, Newcastle has recently undergone a destination rebranding. The Destination Newcastle brand was developed to capture Newcastle's quintessential story of change. Rooted in blue-collar industry, its rich historical heritage, emerging cultural renaissance and growing cosmopolitan identity have gained global acclaim. With natural scenic attractions, a vibrant working harbour and burgeoning diversity, Newcastle is no longer Australia's little big secret.

SEE CHANGE: THE BRAND STORY

Newcastle is no longer just steel mills and coal mines. Its beautiful environment offers a vibrant, energetic and interesting place to live and work in.

As the city has grown and changed so have the characteristics and attributes that define it. This brand aims to encapsulate the new story of Newcastle, demonstrating the diversity, vibrancy, surprise and world class the city now possesses.

NEWCASTLE

The brandmark uses colour to challenge perceptions of the city.

The various hues suggest the different dimensions, activities and influences available in terms of commercial, recreational and lifestyle opportunities that Newcastle has to offer.

IMAGERY AND FOOTAGE

Key imagery and footage needs to be **strong and compelling, including showcasing people actively engaging and having fun,** to evoke feeling and emotions in those who see it and make visitors want to experience what is on offer in Newcastle.

The City of Newcastle recently obtained a library of images and video to accompany the new vibrant Newcastle brand. This library is available for local businesses and organisations to use in marketing campaigns and marketing materials.

Source: www.visitnewcastle.com.au
Source: Brand Newcastle Style Guide

Market Position

Tourism NSW uses a series of *Traveller Types* in its marketing strategies. In 2000, See Australia conducted a study into 'holiday mindsets' (i.e. Traveller Types) based on a 'state of mind' rather than specific demographics alone.

From this research, five holiday mindsets were derived:

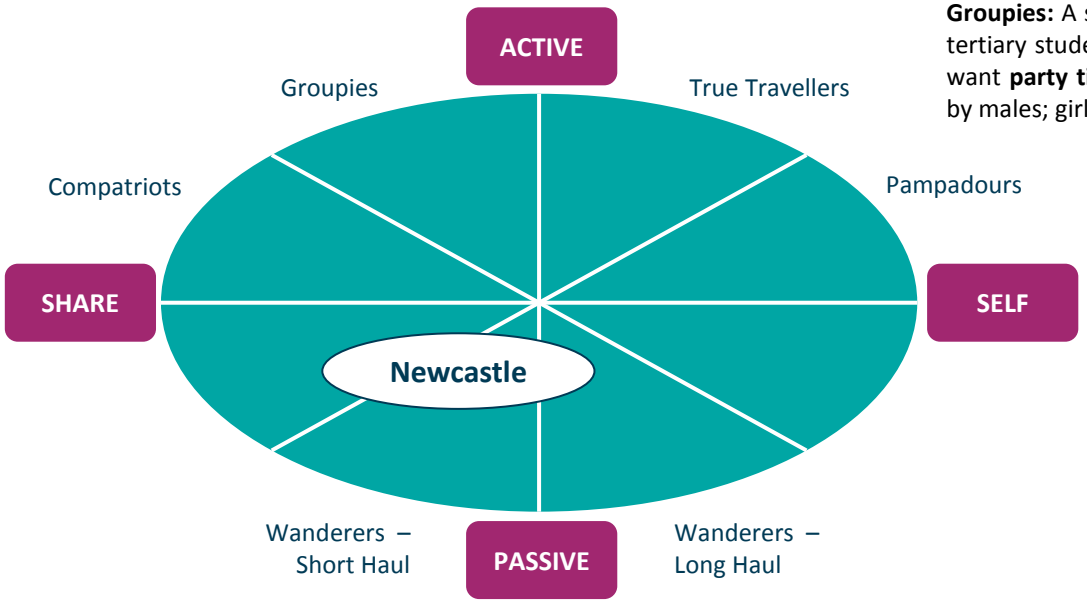
Pampadours: The **indulgence** segment. Pampadours want it all. They seek out new places, new faces, a different culture, climate and food and activities not available or taken up at home. They travel outside school holidays. They avoid caravans; self contained accommodation; day trips and adventure or risk

Compatriots: Middle Australia. Compatriots travel with their **family**. They have to budget and look for value and accessibility. The children of Compatriots often have a role in deciding a holiday destination. Holidays are usually taken in single blocks, to allow maximum recharge.

Wanderers: Independent **potterers**. Nearly 1/2 of the Wanderers segment is retired. Wanderers take many holidays. They seek out value for money and take their holidays outside school holidays.

True Travellers: They are **travellers**, not tourists. They often holiday overseas where they immerse themselves in a different culture. They favour spontaneity. They respond to physical activity; personal fitness travel; adventure; risk and things they would not do at home.

Groupies: A segment with a skew toward youth, males and school and tertiary students. They travel in peer groups and in peak periods. They want **party time**; bright lights; clubs and pubs: fishing or hunting trips by males; girls' weekends, school reunions etc.



*Newcastle has primary target markets of **Compatriots and Wanderers.***

Market Position (Cont)

A visitor profile and satisfaction survey was recently undertaken by Tourism Research Australia (TRA), which identified that Newcastle visitors participate in a wide variety of activities while visiting the destination (Figure 4).

The survey also asked respondents about their **perceptions of Newcastle prior to visiting**, with the large majority perceiving the destination as an **industrial city with a working port** (Figure 3).

Figure 3: Perceptions of Newcastle Prior to Visit

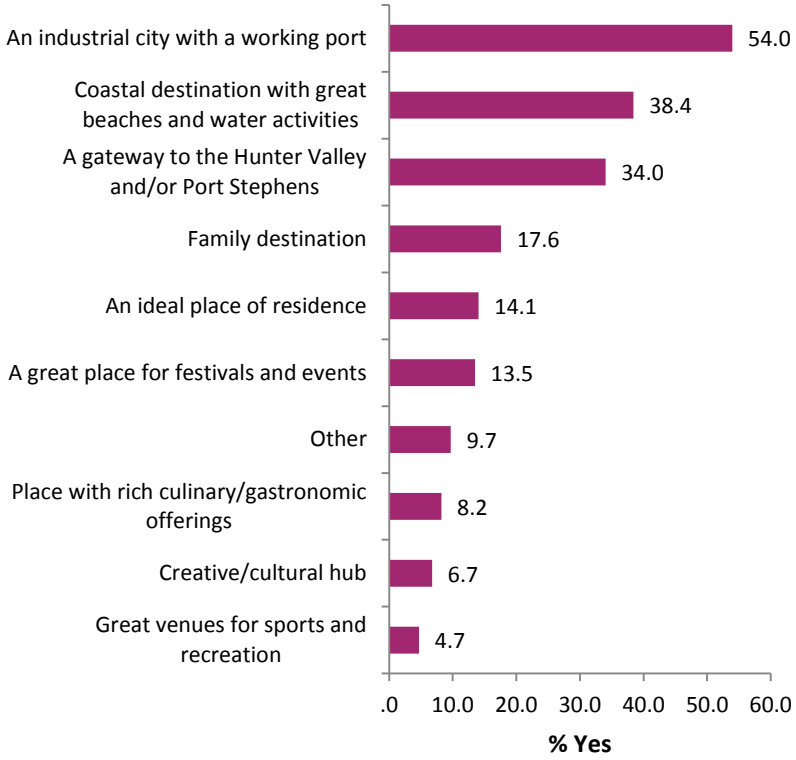
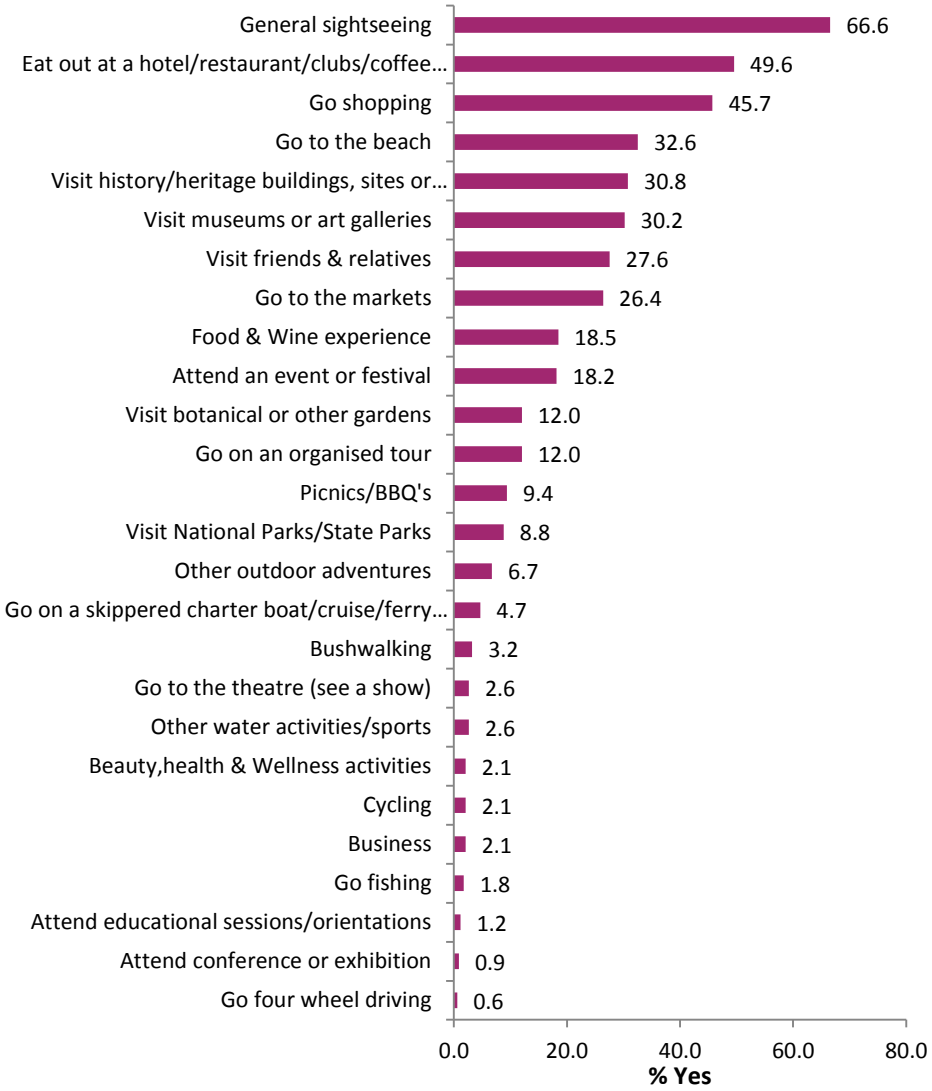


Figure 4: Newcastle Visitor Activities 2012

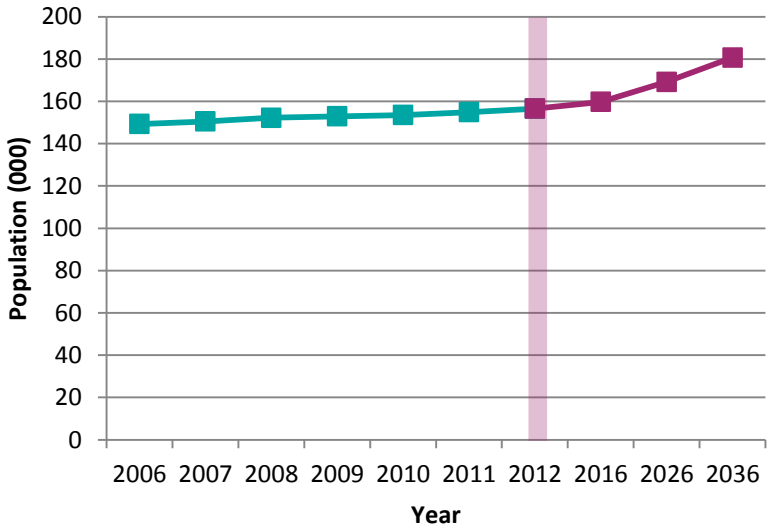


Source Markets

Population Growth

Newcastle's population currently sits at **156,533 residents**[1] and is **projected to increase to 180,640 residents by 2036**[2], which equates to a 15% increase from 2012. As of June 2012, the Australian Bureau of Statistics also listed Newcastle as having one of the highest population densities in NSW (excluding Sydney).

Figure 5: The Projected Population of Newcastle (2006-2036)



At present, approximately **8.4 VFR visitors visit Newcastle per resident each year** and this is slightly lower than the **State total** which sites at **11.3** VFR visitors per resident each year. With the predicted population increase for 2036 (additional 24,107 residents), visitation to Newcastle by this VFR market is **likely to increase by over 200,000 visitors**.

[1] *Regional Population Growth Australia, Australian Bureau of Statistics (2006-12)*
[2] *NSW State and Regional Population Projections 2006-2036, Department of Planning (2008 release)*

Consumer Trends

Consumer trends indicate:

- Australia has an ageing population
- Change in spending patterns – bargain-hunters
- Change in spending patterns – trading up
- Consumers are searching for health and wellbeing experience as part of their holiday plans
- A greater desire for personalisation of the experience
- A desire for sustainable tourism
- That word of mouth is about the experience not the product (Experience Economy)

TOP 10 GLOBAL VISITOR TRENDS

1. Conscious consumption (seek ecologically and culturally sensitive products)
2. Intra-regional and short-haul travel
3. Car rentals, serviced residences, adventure markets and luxury travel
4. Responsible tourism and corporate social responsibility (CSR)
5. Low-cost carriers
6. Sophisticated online marketing distribution
7. Strategic alliances in destinations
8. Safety and security
9. Medical and wellness tourism
10. China (outbound education sector)

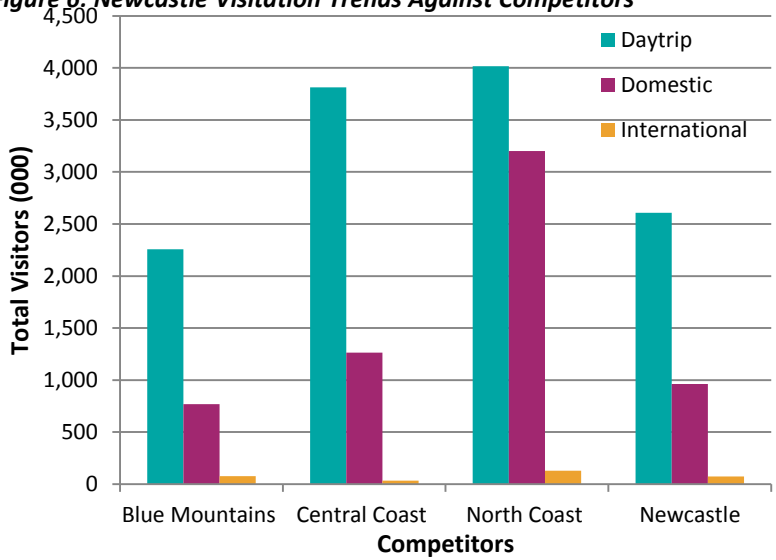
VISITORS

In 2012 (YE Dec) Newcastle received approximately **962,000 domestic overnight visitors** and **2,532,000 domestic visitor nights** including leisure, VFR, business and other travel purposes. This comprises approximately 44% of total visitors and 41% of total visitor nights to the greater Hunter.

This past year, Newcastle also saw approximately **2,609,000 daytrip visitors**, or 49% of total daytrip visitors to the greater Hunter.

In terms of **international** visitors, Newcastle saw approximately **75,300 visitors** and **1,575,000 visitors nights** in 2012 and this comprised approximately 66% of total international visitors to the greater Hunter in 2012.

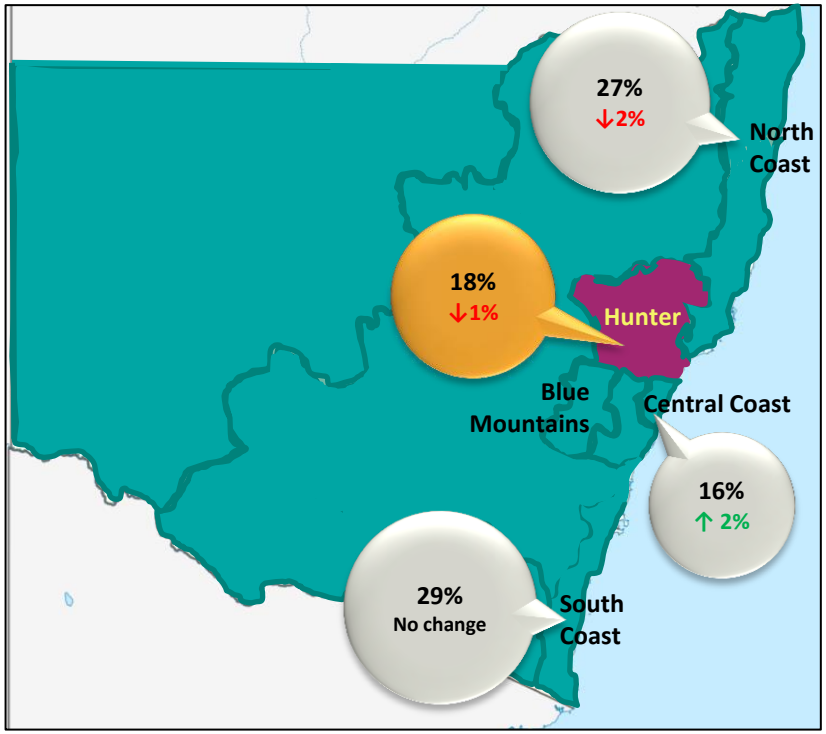
Figure 6: Newcastle Visitation Trends Against Competitors



Sydney Market Share Trends

Below depicts the current market share (YE Dec 2012) of visitors originating against Hunter's competitors and whether this has increased (↑) or decreased (↓) over the last five years (YE Dec 2008).

Overnight Sydney Visitors Market Share



All statistics are per annum based on 4 year average (YE Dec 2009-12)

Visitor Trends

NEWCASTLE VISITOR TRENDS AT A GLANCE:

3.6 million
Total Visitors to Newcastle in 2012

3.9 million
Total Number of Nights in Newcastle in 2012

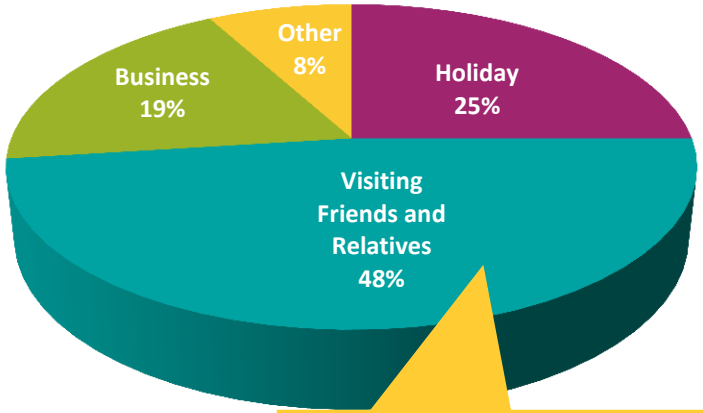
2.6 nights
Domestic Overnight Average Length of Stay

$722 million
Value of the visitor economy to Newcastle

No. 12
Newcastle and the Hunter's Rank in Australia's Top 20 Tourism Regions

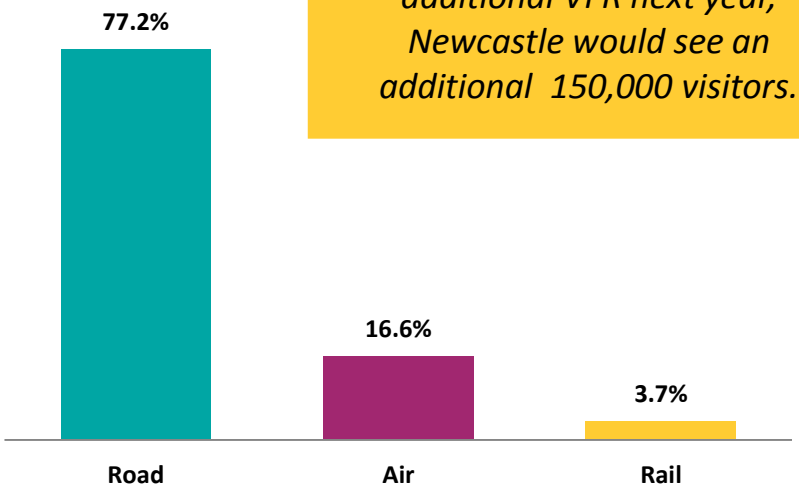
Source: IVS/NVS (2012) Tourism Research Australia

Purpose of Visit



If each resident brought in one additional VFR next year, Newcastle would see an additional 150,000 visitors.

Transport Type



Visitor Trends (Cont)

Origin of Visitors

Domestic Overnight visitors to Newcastle are **primarily intrastate (78%)** followed by Queensland (9%) and Victoria (7%). Of those travelling intrastate, approximately **42% originate from Sydney**.

In terms of international visitors, top three countries of origin include the **United Kingdom (19%), the United States (11%) and New Zealand (10%).**

Figure 7: Tourism Australia's 'Experience Seekers' Market Breakdown (for Newcastle)

	AUSTRALIA 98%	NEW ZEALAND 10%	UNITED STATES 11%
TOP 3 COMBINATION	Nature/Journeys/Outback	Nature/Journeys/Cities	Nature/Journeys/Coastal
			

	UNITED KINGDOM 19%	GERMANY 9%
TOP 3 COMBINATION	Nature/Journeys/Coastal	Nature/Journeys/Aboriginal
		

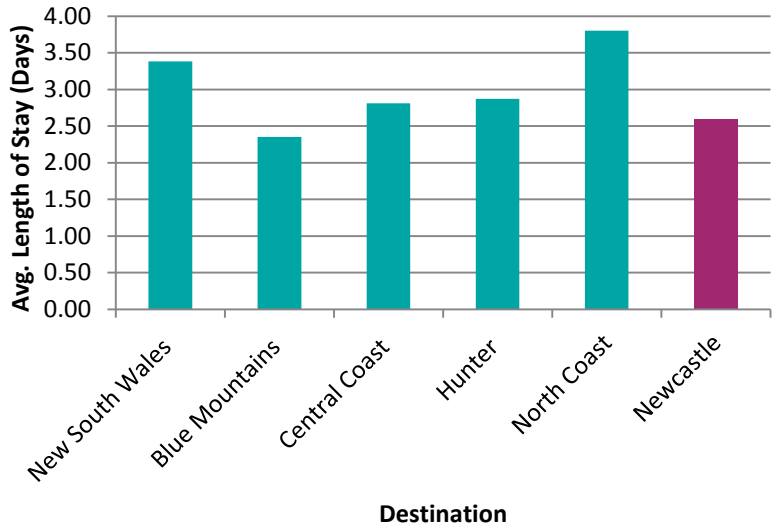
Visitor Trends (Cont)

Average Length of Stay

Average Length of Stay (ALOS) for **domestic** overnight visitors to Newcastle is **2.6 days** (Figure 8). This is slightly lower than the greater **Hunter region at 2.9 days** and **significantly lower than the State average of 3.4 days.**

In terms of **international** ALOS, Newcastle has the highest amongst its competitors at **21 days** and this is believed to be attributed to the extended periods of stay from the international education market (e.g. University of Newcastle). The **State average** sits slightly higher than Newcastle at **23.62 days.**

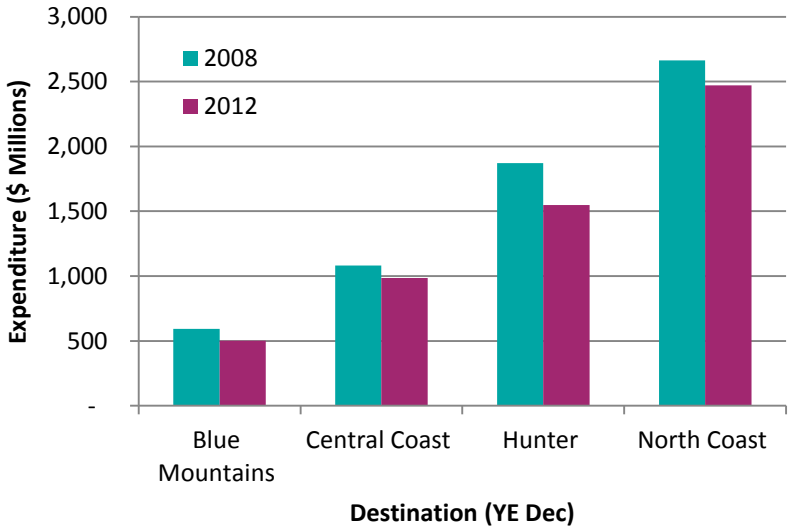
Figure 8: Newcastle Domestic ALOS Against Competitors



Expenditure

2012 visitor expenditure for Newcastle was almost **$730 million** – 38% of the greater Hunter region's total expenditure. **Newcastle and Hunter combined have the second highest expenditure compared to its competitors**, with North Coast in the lead at just over $2.6 billion (Figure 9).

Figure 9: Total Expenditure of Hunter region Against Competitors



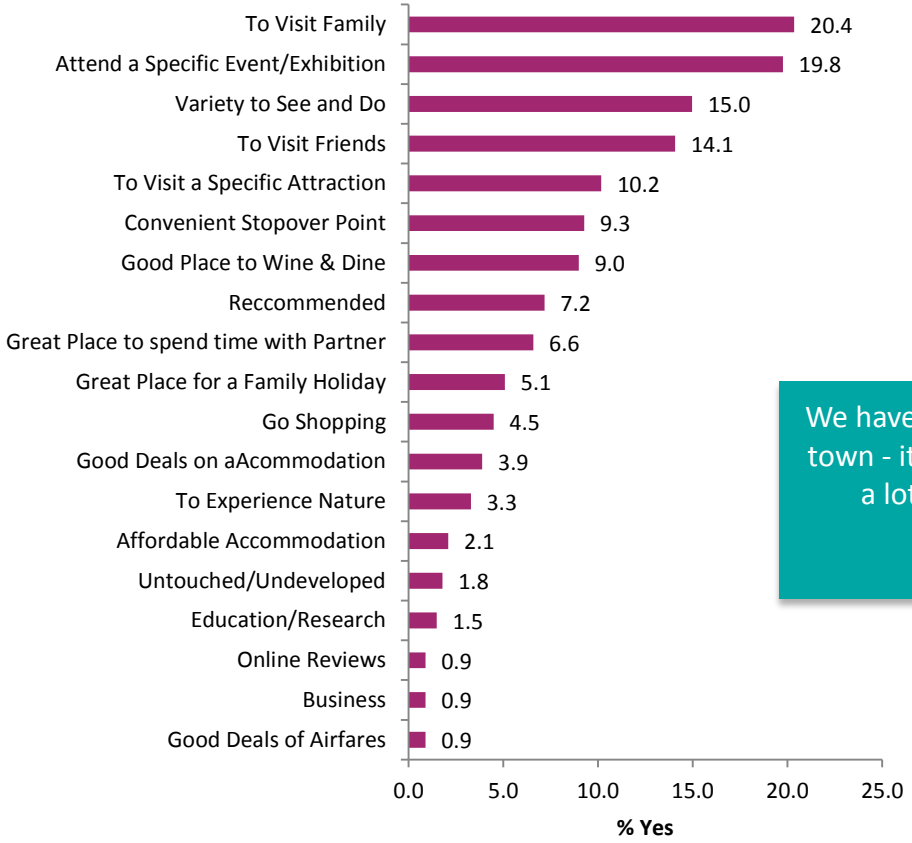
DEMAND

Reasons to Visit Newcastle

Visitor profiling and satisfaction market research for Newcastle has recently been conducted by Tourism Research Australia.

Results indicate that **visiting family** and **attending a specific event or exhibition** are the main drivers for travel to Newcastle (Figure 10).

Figure 10: Reasons to Visit Newcastle



TOP 10 ATTRACTIONS VISITED BY SURVEY RESPONDENTS

Rank	Attraction
1.	Nobbys Beach
2.	Hunter Street Mall
3.	Queens Wharf
4.	Harbour Breakwall
5.	Fort Scratchley
6.	Foreshore Park/Esplanade
7.	Nobbys Lighthouse
8.	Newcastle Beach
9.	Honeysuckle Precinct
10.	Newcastle Museum

We have found Newcastle to be a seriously under-rated town - it is well over its steel city/coal city days and has a lot of very visible history and pretty beaches/ spectacular coastal scenery.

- TripAdvisor Review

Newcastle is a big town. Its greatest weakness/strength is that is not a tourist trap. It is a slower pace than larger cities like Sydney. It´s cheaper and (for the moment anyway) less crowded.

- TripAdvisor Review

Growth Potential

To grow and prosper as a destination, it is vital that the product meets the needs of the market. As such, it is recommended that the following emerging markets be considered as key target areas for growth for Newcastle:

Education

International students are one of the highest value visitor economy categories (second to holiday expenditure), with recent data indicating that international education visitor consumption was worth $6.3 billion in 2011 (growth of 4.2%). Education visitation has contributed around 45% of the growth in visitor economy export earnings over the 1999–00 to 2010–11 period.

In 2010, it was reported that 24% of international visitors were visiting friends and relatives (VFR) and the VFR market has seen a significant growth as a direct result of growth in education visitation.

Key education visitation markets include China, Hong Kong, Indonesia and South Korea for tertiary education as well as high school excursions and study tours.

With academic institutions such as the University of Newcastle ranked 11th nationally and in the top 100 globally for its excellence in research, Newcastle has the opportunity to better leverage its education assets to entice international study and corresponding VFR visitation through targeted incentive packages.

Visiting Friends and Relatives

Australia's visiting friends and relative (VFR) market comprises 34% of total visitors and has increased by 10% over the past five years (YE Dec). In terms of expenditure, VFR visitors contributed over $15 billion to the economy this past year (YE Dec).

In NSW (YE Dec), VFR visitors contributed 43 million visitor nights (29% of State total) and spent $5.2 billion (20% of State total). On average, they spent approximately $79/night.

A recent snapshot on the VFR market by Tourism NSW indicated that this travel market is a significant contributor to NSW's economy, and when accommodation costs are removed, as VFR visitors spend more overall compared to regular visitors.

The snapshot also identified research which indicated that VFR visitors combine their visits with wider travel and touring, stopping overnight in more than three places throughout their trip.

Newcastle's VFR market comprises almost half of total visitation to the destination. Large contributors to this are the education market (primarily out of Asia), fly-in-fly-out coal industry workers and the defence base. With such an influx of these students and workers, the city is well positioned to better leverage the VFR market through targeted marketing campaigns and product packages.

Source: Engaging with the domestic VFR market, Tourism NSW (2010)

Growth Potential (Cont)

Events

Events provide opportunities to increase direct expenditure at a destination, contribute substantially to a destination's range of tourist attractions, facilitate media coverage, promote awareness of the destination for future visitation and lead to the construction of new facilities and infrastructure.

The Hunter region welcomed approximately 42,144 international and 205,000 domestic overnight and 337,000 domestic day-trip visitors who participated in an event during their stay in YE December 2012. This represents an overall increase of 21% since 2008.

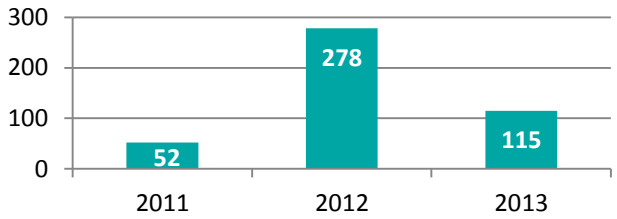
With significant access and infrastructure developments currently underway, such as the Newcastle airport and Hunter Valley Expressway, Newcastle has the capacity to leverage this growth by attracting new significant events which will increase visitation from Sydney and Brisbane.

EVENT OPPORTUNITY – Business Events

The highest daily yield of any sector of the visitor economy is produced by business events - $212 per night in 2010, compared with $136 per night for all overnight visitors in Australia. Approximately 10,000 international, 325,00 domestic overnight and 733,000 domestic day visitors to the Hunter came for business purposes in the YE December 2012. This represents an overall increase of 43% in the business market over the last five years.

Business events provide a perfect opportunity for mid-week visitation dispersal. An article in the Newcastle Herald (27 April 2013), identified a $400,000 investment from Tourism Accommodation Australia to draw business events to the into the regional areas including the Hunter. This funding should be leveraged to ensure maximise potential business events in the region.

Figure 11: Number of Licenced Events



Refer to Appendix 3 for a list of key event and venue assets.

GREEN EXERCISE IN CONFERENCE PROGRAMS

Newcastle is a warm, friendly and welcoming city, so we want to ensure the delegates visiting are provided with a superior experience, not just in terms of delivering a seamless event program, but also in the way of servicing their personal wellbeing. In their home countries, we know delegates will spend more time inside, sitting at their desks, and less time outside. Newcastle is a walkable city and its conference programs provide delegates with ample opportunities to get back to nature.

We're the event destination that aims to swap indoor delegate activities for more refreshing and enriching outdoor green exercise events and activities.

Engaging in outdoor green exercise activities will not only provide delegates with unique experiences, but research results prove that memory performance and attention spans improve by 20% after people spent an hour interacting with nature (Berman, Jonides, & Kaplan 2008). As a result, delegates will be more alert and ready to participate in, and be challenged by, the conference sessions.

More importantly, when people interact with nature it has benefits for people suffering with medical conditions including diabetes, depression and anxiety, asthma and migraines (Maas ,Verheij, Groenewegen, de Vries & Spreeuwenberg 2006).

Growth Potential (Cont)

Sports

Newcastle and the Hunter Valley welcomed approximately 14,308 international and 151,000 domestic day visitors who attended an organised sporting event in the YE December 2012, this is a 5% increase on 2008.

Newcastle has an opportunity to harness the sports market by securing more sporting events like the Asia Cup to be held in 2015, such as a cycle-based event (see aside). In this respect, key infrastructure such as the current stadium upgrades and product packaging will be vital to secure large sporting events.

TOP 10 GLOBALLY LEADING SURF CITIES
Arica ,Chile
Donostia-San Sebastian, Spain
Durban, South Africa
Ericeira, Portugal
Gold Coast, Australia
Hossegor, France
Las Palmas de Gran Canaria, Spain
Newcastle, Australia
Santos, Brazil

Source: http://www.surfingqueensland.com/news-details.php?id=442

CASE STUDY– Cape to Cape MTB, Western Australia

Cape to Cape MTB is a 4 day mountain bike race through the south-west region of Western Australia. Set to an iconic backdrop of world famous surf beaches, private farmlands, rocky outcrops and national forests, the event is fun and challenging for riders of all levels, from recreational to competitive.

In 2013 the event will run for its sixth year, with participant numbers expected to increase again. Race organisers are planning for more than 12,000 riders to be drawn to the event. When taking into consideration average spend per night of visitors in the region of $147[1] the race in 2013 could potentially bring approximately $7M in visitor spend to the Augusta-Margaret River region.

[1] LGA Profiles – Augusta-Margaret River, RET

Source: http://capetocapemtb.com/

NEWS FLASH: Newcastle will host an international MTB event in 2014 in partnership with Hunter Valley Wine Country and Destination Port Stephens. Keep your eyes out for more information.

Growth Potential (Cont)

Cruise Market

The number of Australians cruising rose 34% between 2010 and 2011, to over 623,000 Australian Cruise Passengers. This equates to 2.7% of the population, placing Australia second in overall market penetration worldwide.

An average cruise ship call is the equivalent of four A380 landings, with the advantages of cruise visitation for destinations further supported when considering the spend of a cruise passenger while on a day visit to shore is 60% higher than the average spend of a non-cruise visitor. Cruise passengers directly spent $830 million in Australia in FY11.

New South Wales, particularly Sydney, has benefited greatly from the cruise shipping industry and continues to grow as a major international cruise destination. In 2010-11, there was a significant increase in cruise ship visits and passenger and crew days at the Newcastle port. In 2010-11, expenditure resulting from the cruise shipping industry was approximately $814.0 million, of which $768.3 million occurred within the Sydney statistical division.

There is a significant opportunity to not only increase the number of cruise vessel visits to Newcastle through targeted promotion with cruise lines (including the potential to attract a base port operation again) but also to better engage the local industry in offering shore excursions to increase the benefits that the cruise industry provides.

Source: ***AEC Group, 2011,*** *Economic Impact Assessment of the Cruise Shipping Industry in Australia, 2010-11, Cruise Down Under*

Medical Tourism

Medical tourism is defined as the process of patients travelling abroad for medical care and procedures, usually because certain medical procedures are less available or less affordable in their own country (Voigt et al. 2010).

Although a recent medical tourism scoping study for TRA identified that Australia's medical tourism market is small and scattered, it was found that approximately 5.5 million visitors travelled for medical reasons, with an estimated growth rate of 15% between 2005 and 2010 and a higher average spend than regular visitors.

With state of the art medical facilities such as John Hunter and Calvary Mater Newcastle hospitals witnessing an influx of out-of-region patients (see below table), the City of Newcastle has the potential to better market to this group through a targeted marketing campaign.

DISTANCE	2008/2009	2009/2010	2010/2011	% CHANGE (2008-2011)
<100km	51,702	54,074	55,612	8%
100 - 200km	3,728	3,831	3,914	5%
200 - 300km	1,264	1,276	1,409	11%
300 - 400km	786	758	808	3%
400 - 500km	374	452	459	23%
>500km	413	471	503	22%

Source: Medical Tourism in Australia – A scoping study, Deloitte (2011)
Table Data Source: FLOWINFO Version 11.2 - Statewide Services, NSW Department of Health (2011)

Growth Potential (Cont)

Overnight Short Breaks

The short break market has increased globally over the past few decades, however within Australia, faces major competition particularly from cheaper international destinations. Nevertheless, in NSW alone the short break market contributes almost $1 billion in expenditure to the regional NSW economy.

Short breaks are characteristically weekend or mid week getaways taken in nearby regional or national destinations. Convenient access is a driving factor in destination choice. Key motivations for taking short breaks include relaxation and rejuvenation as well as the pursuit of a specific activity or interest.

Drive Market

In the year ended December 2012 Newcastle and the Hunter welcomed approximately 1.9 million overnight visitors* who drove to the region, representing a **7% increase** in drive visitors to the region over the last five years.

The drive market to the region can be broken down further, with 1,896,00 (96%) visitors being domestic and the remaining 71,912 from an International origin. The drive market accounts for 87% of the total domestic visitors and 63% of the total international visitors to the region.

The drive market is key to Newcastle, however, it could be further maximised by aligning the destination with an established touring route or by packaging new tour routes with other Hunter destinations. This may be more effective and ensure better leverage of Newcastle's product and position.

*Transport modes selected include private or company car, rented or hire care and self drive motor/camper homes.

DRIVE OPPORTUNITY: The Legendary Pacific Coast

The Legendary Pacific Coast drive route takes in the 900km coastline between Sydney and Brisbane and includes all the destinations from the New South Wales Central Coast in the south to the Tweed region on the Queensland border.

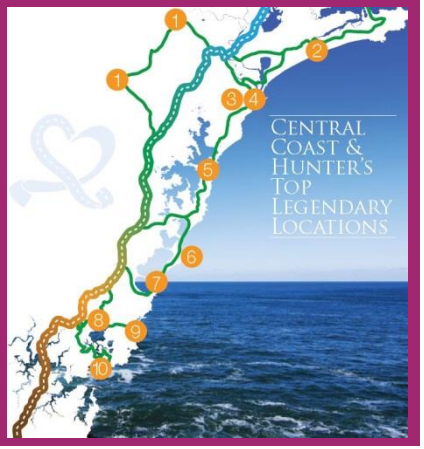
The touring route underwent a significant rebrand in 2010 and since then the marketing presence of the Legendary Pacific Coast has grown from strength to strength, it is now New South Wales' largest industry led and owned collaborative visitor economy marketing initiative with over 400 industry members.

The Pacific Coast contributes over $6 billion to the North Coast Regional Tourism Organisations' economies (National Visitor Survey for YE September 2012) and approximately 90% of visitors to the NSW North Coast RTO's are self drive travellers. A total of 25.5 million visitors travelled to destinations along the Legendary Pacific Coast in 2012, with over 32 million visitor nights provided by accommodation operators on the Legendary Pacific Coast.

Of these, 466,700 were of international origin and spent 4.78 million visitor nights (45% of entire international visitors nights in regional NSW).

THE LEGENDARY PACIFIC COAST
SYDNEY TO BRISBANE, AUSTRALIA

Did you know that 80% of travellers choose their destination before they choose the route they will travel?



KEY INFRASTRUCTURE

MAJOR PROJECTS

Newcastle Airport Redevelopment

Port Stephens Council has recently approved the expansion of the Newcastle Airport, which will more than double the size of the existing terminal and increase annual passenger capacity from 2 million to 5 million.

The $80 million expansion will provide the infrastructure needed for domestic growth as well as provide infrastructure needed to allow for international flights.

The redeveloped Airport will provide an alternate gateway to NSW and is currently seeking services to international destinations, such as New Zealand, for which there is significant demand, and Asia for the expected influx for the Asia Cup.

Source: Newcastle Airport MasterPlan

CASE STUDY: The Gold Coast Airport

The Gold Coast Airport at Coolangatta is Australia's fastest growing airport and is the 4th busiest international Airport in Australia.

Since it commenced flights in 1936, over the past 65 years Gold Coast Airport has undergone a major transformation from being an emergency landing strip to an International Airport with over 5 million passengers travelling to and from destinations across Australia, New Zealand, Asia and beyond.

Gold Coast Airport is significant as an economic driver of the region, in terms of employment, direct and indirect economic impact and the facilitated impact arising from the flow on effects of tourism.

An independent report on the Airport identified the economic importance of the precinct at $296 million in 2009/2010, which is expected to reach $368 million by 2016/2017 and $768 million by 2031/2032. By 2016/2017 the Gold Coast Airport is also expected to facilitate 2.61 million visitors to the region (a 36% increase from 2010) and bring in $2.17 billion in visitor expenditure to the local economy.

Source: http://goldcoastairport.com.au

KEY INFRASTRUCTURE (CONT)

MAJOR PROJECTS (CONT)

Hunter Expressway

Construction of the Hunter Expressway is currently underway to link the F3 Freeway near Seahampton and the New England Highway, west of Branxton. This $1.7 billion project is one of the biggest road infrastructure projects to be built in the Hunter and will provide a new east-west connection between Newcastle and the Lower Hunter. The Expressway is set to be complete in September, 2013 and is expected to cut travel times between Newcastle and the Hunter by an estimated 28 minutes, improving access to the region for key target markets such as Sydney residents and visitors.

Asia Cup: Newcastle Stadium Upgrade

Newcastle Stadium is one of only two NSW venues selected to host some of the 2015 Asia Cup matches during the three week, 32 match festival of football. The Stadium received an $80 million upgrade in 2011 that included a new Western Grandstand that increased the venue's capacity to 33,000 and added state of the art corporate, media and event facilities.

Held every four years, the Asian Cup is expected to bring more than 500,000 spectators including 45,000 international visitors to Australia. Live television coverage also allows for the event to be viewed by millions globally. This could potentially bring $30M of visitor expenditure into the region.

Source: http://www.rta.nsw.gov.au/roadprojects/projects/hunter_expressway/index.html
Source: http://www.portnews.com.au/story/1395474/asian-cup-legacy-needs-to-be-facilities/
* $ estimation made based on estimated visitors per match and the average spend per visitor to Newcastle

NEWCASTLE MAKE MY CITY WORK CAMPAIGN

The Make My City Work campaign (an initiative of the Property Council of Australia) has just released the results of the Newcastle City Poll.

Over 600 Novocastrians took part in the poll, which caused a flurry of debate on the website.

- 70% said it was local and state government that most stood in the way of progress.
- Derelict buildings (51%) and public transport (17%) were seen as big challenges for the city centre, local government red tape (12%) also scored highly.
- The 57% of people who voted to remove level railway crossings in the city and develop a new interchange west of Stewart Avenue have been vindicated. Less than one third (28%) of people believe the heavy rail line between Wickham and Newcastle works well.
- When it came to inter-city rail, 70% said the highest priority should be upgrading the Newcastle to Sydney line to improve journey times.
- 33% of people said their number one priority for revitalizing the city centre would be a University campus in the CBD.
- A whopping 99% voted for a more vibrant night-time economy and supported the creation of new small bars, restaurants, cafes and live music venues.

A full report will be available in the New Year.

Information supplied by the City of Newcastle

Key Infrastructure (Cont)

Other Major Projects

Newcastle City Centre is currently undergoing a period of significant change following the completion and release of major planning reforms by the NSW Government and The City of Newcastle. The Hunter Street Revitalisation Strategy has provided an ideal framework to underpin the change to the City Centre and positive results have begun to filter through the property development industry with an increasing number of significant proposals.

A summary of recent announcements, approvals and completed projects (listed in the following tables) illustrates that investment exceeding $250 million has been committed to the revitalisation of the City in the past 3 years. There is a significant number of development applications approved within the City Centre for major projects that have not been included in this summary as this may exaggerate the positive benefits of the real projects.

COMMERCIAL

Description	Project Value	Expected Completion
Expansion of Marketown Shopping Centre	$15,000,000	completed 2012
Expansion of Hunter Street retail	$5,000,000	2015-16
New State law Courts complex	$75,000,000	2015 (work underway)
Commercial office development west end	$5,000,000	work underway
A grade office development / refurbishment	$10,000,000	2013-14 (work underway)
Commercial alteration	$2,000,000	2013-14 (work underway)

GOVERNMENT

Description	Project Value	Expected Completion
NSW law courts building	$75,000,000	2015 Work underway
Improvements to no.2 Sportsground by Council	$7,000,000	2012 Completed

ACCOMMODATION

Description	Project Value	Expected Completion
Stage 1 of 200 room development east end	$15,000,000	2014-15
47 serviced apartments and heritage re-use	$9,000,000	2014
250+ apartments	$40,000,000	2015
50 room hotel style redevelopment of heritage site	$6,000,000	2014 (work underway)
Star Hotel site 31 units plus 3 commercial tenants	$5,500,000	DA submitted May 2013
Bimet lodge site redevelopment. 102 units, 112 pax Boarding house development	$15,000,000	Construction due to begin 07/2013, units currently for sale

HOSPITALITY

Description	Project Value	Expected Completion
Function centre on old Newcastle Bowling club site	$4,000,000	2014-15

HOSPITALITY

Description	Project Value	Expected Completion
University city campus	$60,000,000	Design planning underway after grant funding announcement April 2013.

Information supplied by the City of Newcastle

Key Infrastructure (Cont)

Other Key Infrastructure

Product/Service	Description	Why is it key?	Gaps/Potential
Hunter Stadium, Hunter Ice Rink, Hunter Basketball Stadium, & surrounding facilities	Hunter Stadium: 33,000 capacity multi-purpose facility. Additional 10 major sporting facilities in the City surrounds plus additional in neighbouring areas.	Hosts local / professional teams and gives Newcastle the potential to host major sporting events.	Develop "hub" or precinct in Broadmeadow.
Fort Scratchley	Historic site, low grade museum, visitor economy potential lightly tapped.	Develop tunnel tour and create the site a key visitor economy destination for regular inclusion in local visitor economy product development. Event location development will also enhance the capacity to improve the ongoing attractiveness of the site.	Current gap is with the management of the potential of the site. This has been improved on as a function location but further development of user pay activities is required.
Information & communication provision	Public Wi-Fi, city signage, VIC identification, City maps, visitor friendly website and mobile apps	Communicates directions and activities for locals and visitors, allows operators to promote their product. Provide platform for communications from visitors and locals and offer the opportunity for product development.	Need increased and better placed signage to direct visitors to strategic locations. Improved collateral for distribution to key target markets. Improved partnerships between stakeholders to improve sustainability of the key products under development.
Harbour & surrounding area	Largest coal exporter in the world. Foreshore area with restaurants and night time activities along the working harbour. Provides easy access around the city centre.	Allows a unique industrial experience while visiting the foreshore. Leisure based product, walking tours, history & local culture provide the unique experience.	Development of low impact product supporting walking tours and self guided. Combine with an introduction to developed product

Key Infrastructure (Cont)

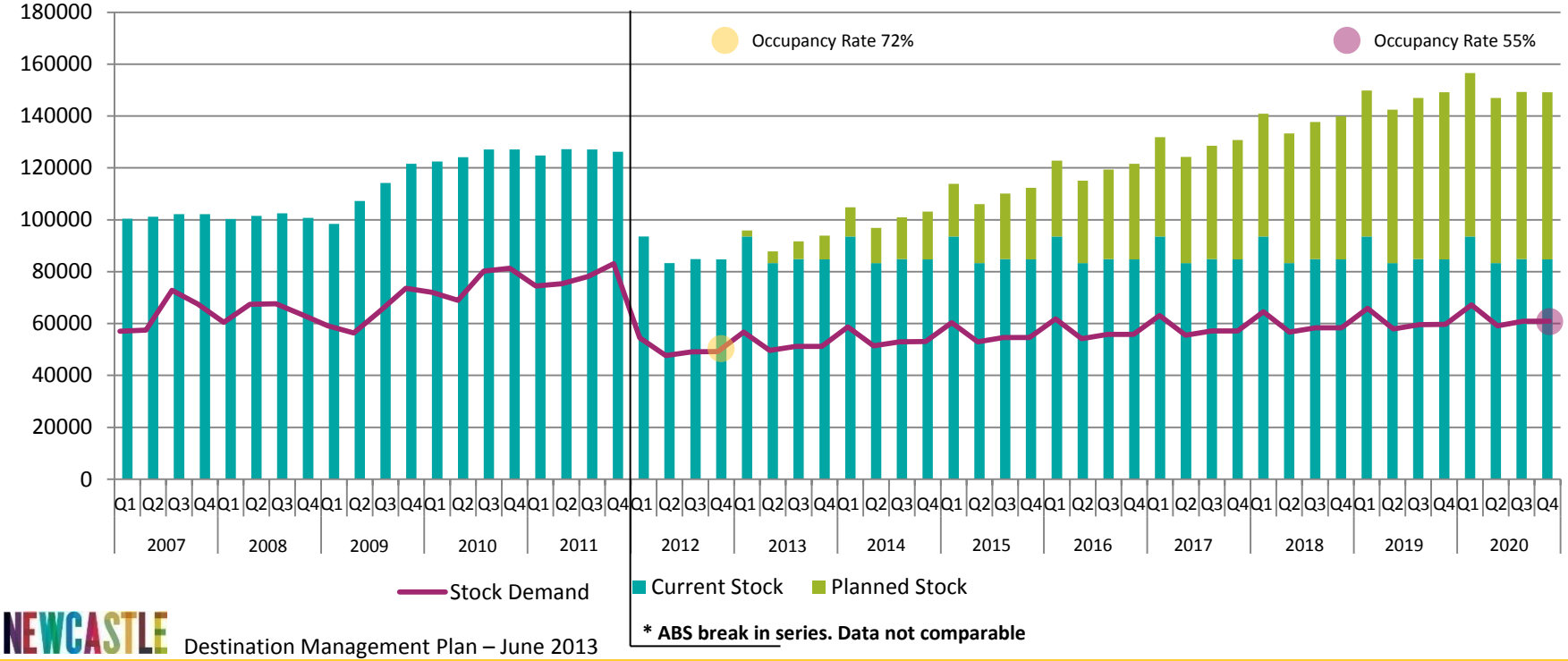
Product/Service	Description	Why is it key?	Gaps/Potential
John Hunter Hospital & Medical Facilities	Regional hospital and medical centre with full teaching facilities. Children hospital wing and specialist medical centre. Mater hospital provides full oncology services in addition to regular hospital.	Working with regional providers with links to on-line treatment as NBN progresses. Highlights the position of Newcastle as a regional capital and encourages further visitation post treatment or relocation for ongoing treatments. Relationship with University and HMRI offers more links to premium position statement for Newcastle.	Resources required to assist in highlighting the recognised strengths as a regional facility and key partner in the City's profile.
University of Newcastle	35,500 students and reputable research facilities, multiple campuses, Internationally recognised	Local student population of 17 500 provides a target for many activities to maintain sustainability year round. Further access to students at distant locations provides further opportunity for attraction at a student level.	Extra budget base accommodation in the City would create a greater market for this demographic. Possible partnerships with the UoN for events and activities is very poor from all partners.
Hunter TAFE – Newcastle Campus	Largest campus in the Hunter TAFE network and15 minutes from CBD. Approximately 5,000 students. Specialist facilities and purpose-built spaces including facility hire.	Local student population of 17 500 provides a target for many activities to maintain sustainability year round. Further access to students at distant locations provides further opportunity for attraction at a student level.	Possible partnerships with TAFE for events and activities.
Transportation and Accessibility	Transport infrastructure such as roads, rail, cycle ways and walking tracks. City tours are being developed, waterfront access is superior.	Connects the city for ease of access to coastline and harbour. Provides for future in a less car orientated society. Green / environmental approach a key to future attractiveness.	New state government transport management plan for the CBD with improved bus interchange and vehicles to offer a service expected of a major regional centre.

Forecast Accommodation Data

Based on the available data in the Australian Bureau of Statistics - Survey of Tourist Accommodation (2005-2012) for Hotels, Motels and Serviced Apartments, Figure 12 below shows the trend in room supply and demand for Newcastle over the past seven years. The 'Guest Nights' figures from 2013-2020 are based on the Tourism Forecasting Committee (TFC) predicted growth rates in Domestic and International room nights in commercial accommodation for NSW (applied to the region). The 'Room Supply' is based on forecast increased supply from projects either underway or planned from information provided to EC3 Global at the time of publishing this report.

The forecast visitor nights in commercial accommodation demand for **Newcastle** is only estimated to grow at 1.4% per annum, at this rate the average room occupancy for the region reach 85% by 2020 based on current occupancy rates. This supports a growth in room stock of over 400 rooms between 2013 and 2020 based on the industry standard for commercial investment of investment when the annual average occupancy rate reaches 65-70%. However, when the planned increases in room stock between 2013 and 2020 of over 500 rooms is applied the average annual occupancy rate drops to 55%. This does not account for growth in particular star graded room stock as the supply and demand for rooms at this level is not available through the Survey of Tourist Accommodation (ABS).

Figure 12: Forecast Accommodation Data



Communication Channels

Communication channels are an essential component of information delivery and uptake in attracting target and emerging markets.

Figure 13: Relevant Communication Channels throughout Visitor Experience Cycle

To successfully reach Newcastle's target audience, the City of Newcastle must be able to relay its key messages via relevant communication channels throughout the visitor experience. This will help influence the decision making processes that lie behind their desires, motivations and subsequent travel actions.

Destination Direction

FOCUS

Newcastle is a city of opportunities, where visitors can see a city that is evolving right before their eyes, but where the industries that built it are still operating and working harmoniously with the new visitor economy. Where you can stand-up paddle board next to a massive coal ship, where you can have five-star dining on the banks of a working port, where you can be in a boardroom for the morning and in board shorts after lunch and back to the boardroom without losing a day.

The primary visitor economy for Newcastle is **short breaks out of Sydney** (40% of total domestic visitors), with **visiting friends and relatives** (39%) and **leisure** (24%) among the most popular reasons to visit Sydney-based visitors.

VISION

A visitor economy vision for a destination needs to be clear, concise and leverage the unique selling points of the region. Taking the above considerations into account, the proposed visitor economy vision for Newcastle is:

Newcastle is making history – not waiting for it to happen.

MISSION

The proposed visitor economy mission for Newcastle is:

Create a unique invitation to come and then give visitors awesome experiences to talk about to their social and community network.

GOALS AND OBJECTIVES

1. Increase average length of stay
   Measure: increased visitor nights

2. Increase spend per day and overall value of the Visitor Economy
   Measure: increased visitor expenditure

3. Increase VFR by having more supportive and positive locals
   Measure: Increased VFR visitors

4. Double the amount of positive social media about the destination
   Measure: Double amount of Visit Newcastle Facebook page 'likes'

Action Plan

STRATEGIC PRIORITIES

There are four strategic priorities each with a number of actions and one catalyst project, they are:

1 A unified voice for the businesses engaged in the Visitor Economy

Catalyst Project: *Establish an industry-led peak body for Newcastle that speaks on behalf of a range of existing organisations to encourage a single voice for industry advocacy and where possible consumer messaging*

2 Get the industry connected

Catalyst Project: *appoint mentors to assist industry to package and engage in the distribution system in preparation for major events*

3 Engage the global social and community networks that love our experiences

Catalyst Project: *Invest in targeting social media campaigns that target influencers in emerging global social and community networks to become advocates / ambassadors for Newcastle with a focus on leveraging events.*

4 Create signature experiences: starting with the East End

Catalyst Project: *Develop an East End Visitor Economy Masterplan to prepare for the post-rail closure that looks are precinct linkages, visitor safety, interpretation and iconic project attraction*

Enablers of Success

For the strategic priorities to occur the following enablers are needed:

- Secure the funding and upgrade the **Newcastle Airport**
- Establish appropriate infrastructure for **base-porting cruise ships**
- Build a dedicated **Convention Centre** to attraction exhibitions and events with 500+ participants
- Embrace the **Education Revolution** occurring in the region and become a truly global city
- Revitalise the Destination approach through a **new Regional Tourism Organisation** and partnership model
- Undertake a **review of the current and future sports infrastructure** needs to improve the regions competitiveness in attracting national and international level events
- **Monitoring Progress:** to gain and maintain stakeholder support it is vital that the Key Performance Indicators are monitored and results reported quarterly in the form of a short quarterly report. At the end of the first year a review of progress against all indicators and a tracking of progress on each project should also be completed.

Strategic Priority 1

A unified voice for the businesses engaged in the Visitor Economy

	ACTION	TIMEFRAME	RESPONSIBILITY
1.1	Create a new **industry-led peak local tourism body**, Destination Newcastle, that supports the development and marketing of the destination in partnership with the Business and Industry Associations, key local partners and the industry to grow the value of the Visitor Economy in conjunction with the Regional Tourism Organisation (Visitor Economy Hunter)	Short Term	TCoN, NTIG, BIAs
1.2	Support a **volunteer visitor ambassadors program** with a common uniform and an incentives to encourage volunteers to know the region and have more first hand experiences they can share with visitors drawing from each of the existing organisations volunteer groups	Short Term	TCoN, NTIG, BIAs
1.3	Showcase the ease of accessing key visitor nodes through business and sporting event packages coordinated through a **central Sports and Events Bureau** run by industry and supported by Council	Medium Term	TCoN, NTIG, Tourism Hunter
1.4	Create a **local story tellers network** to begin linking the regions history, nature and people to promotion to actively encourage longer stays	Short Term	NTIG
1.5	Support the development of a **unified voice across the broader Hunter destination** for the industry and to market to key sectors (especially business and sporting events) via the Hunter Councils agreement	Short Term	TCoN, NTIG, Tourism Hunter
1.6	Coordinate the current **welcome and induction programs for new residents** (including students) such as the and new staff in the visitor economy to showcase the regions attractions and experiences and create new ambassadors for the region.	Medium Term	TCoN, BIAs, University of Newcastle, Hunter TAFE
1.7	More **active promotion of famils** programs for Councils, decision-makers, operators, locals and trade to showcase the regions experiences	Short Term	TCoN, NTIG, Tourism Hunter
1.8	**Quarterly review and reporting on each of the Key Performance Indicators** in the form of a short quarterly report. At the end of the first year a review of progress against all indicators and a tracking of progress on each project should also be completed.	Short Term	TCoN

Catalyst Project: *Establish an industry-led peak body for Newcastle that speaks on behalf of a range of existing organisations to encourage a single voice for industry advocacy and where possible consumer messaging*

Strategic Priority 2 Get the industry connected

	ACTION	TIMEFRAME	RESPONSIBILITY
2.1	Create stronger links between the precincts, products and visitors to our local stories through a **regional signage strategy** for both directional and interpretation signage	Medium Term	TCoN
2.2	Make **user generated content a priority** and find ways to make it easier for visitors to share their experiences and the local stories	Short Term	NTIG, Tourism Hunter, BIAs
2.3	Undertake a **review of Visitor Services** and embrace the digital economy in pre-trip and in-region information provision, where possible make this a destination-wide (not just regional) approach	Medium Term	NTIG, Tourism Hunter, BIAs
2.4	Create a **visitor safety program** including roaming volunteer ambassadors, implementing crime prevention through environmental design (CPTED) practices in all new place-making and encouraging greater co-location of new investment	Medium Term	TCoN, BIAs
2.5	**Work with Forestry and National Parks** to assess the current network of Mountain Bike (MTB) Trails and work with local clubs to bring unmanaged trails up to rider-ready status and begin promoting MTB trails across the region prior to the International MTB event (2014)	Medium Term	Department of Forestry, NPWS, TCoN
2.6	**Build industry capacity** to engage in the distribution system, in particular to become '**cruise ready**' and actively engaging the cruise lines and other ITOs	Medium Term	TCoN, NTIG, Tourism Hunter, Destination NSW
2.7	Increase **communication with adjacent LGAs** to develop the 'greater' Newcastle product	Short Term	TCoN, NTIG
2.8	Mentor and **support industry to package and promote products** through the distribution system (therefore requiring industry to be market-ready) to better leverage visitor spend around events including working with airlines and new online distribution channels.	Medium Term	TCoN, NTIG
2.9	Invest in '**market ready' programs** to get operators ready for new markets including China	Medium Term	NTIG, Tourism Hunter

Catalyst Project: *appoint mentors and develop programs to assist industry to package and engage in the distribution system in preparation for major events*

Strategic Priority 3

Engage the global tribes that love our experiences

ACTION	TIMEFRAME	RESPONSIBILITY
3.1 **Target more active and engaged visitors** including True Travellers and Peer Groups to engage with the regions sports, history, nature and events.	Short Term	NTIG, Tourism Hunter
3.2 Develop an **international market prioritisation strategy** in partnership with the Hunter destination	Medium Term	TCoN, NTIG, Tourism Hunter
3.3 **Create new self-guided tours and trip planning tools** that allow 'experience seeking' visitors to get beneath the surface of the city	Short Term	TCoN, NTIG
3.4 **Encourage new product development** in areas such as adventure and tour operations through a proactive approach to investment attraction and supporting new ideas.	Short Term	NTIG, Tourism Hunter, BIAs
3.5 Work with the Hunter Destination to establish a **visitor economy research program**.	Short Term	NTIG, Tourism Hunter
3.6 Develop a **smart phone App** that will consolidate and link Newcastle's web-based visitor information	Short Term	NTIG, Tourism Hunter, BIAs
3.7 Increase the number of **free Wi-Fi outlets** across the City to maximise smart phone App uptake by visitors	Medium Term	TCoN, BIAs
3.8 Improve **access and amenity** to natural assets (e.g. beaches, Blackbutt Reserve and Stockon Wetlands, Glenrock)	Medium Term	TCoN

Catalyst Project: *Invest in targeting social media campaigns that target influencers in emerging global social and community networks to become advocates / ambassadors for Newcastle with a focus on leveraging events.*

Strategic Priority 4

Create signature experiences: starting with the East End

	ACTION	TIMEFRAME	RESPONSIBILITY
4.1	Develop a **new business model** for the operation and management of **Fort Scratchley** that encourages the product to better package with existing product and creates a world-class visitor attraction while maintaining strong local and community support and base of volunteers	Short Term	TCoN, NTIG
4.2	Promote the location for a **Convention Centre** (HDC Site)	Short Term	TCoN, Hunter Development Corporation
4.3	Prepare a **transport plan for the East End** exploring innovative options for getting visitors to the key locations and promote it	Short Term	TCoN
4.4	Develop **iconic lookouts** to create linkages between precincts and walking distance experience nodes in the East End.	Short Term	TCoN, NTIG
4.5	Prepare a **Masterplan for Nobby's Lighthouse** including future tourism potential and interpretation needs	Short Term	TCoN, Newcastle Now
4.6	Encourage ongoing **investment and management of culture and heritage assets** for increased exposure and accessibility	Medium Term	TCoN
4.7	Work with industry to develop **night-based experience packages** by leveraging existing product such as the City Evolutions Project	Medium Term	NTIG, Newcastle Now

Catalyst Project: *Develop an East End Visitor Economy Masterplan to prepare for the post-rail closure that looks are precinct linkages, visitor safety, interpretation and iconic project attraction*

CITY EVOLUTIONS PROJECT, NEWCATSLE

City Evolutions is a landmark contemporary art project featuring a series of interactive lighting installations along Newcastle's oldest street, Watt Street. The journey takes visitors through the fascinating history of this stunning historic and cultural precinct, sunset to 10pm each evening.

City Evolutions is part of the City of Newcastle's strategy to revitalise East Newcastle, through a new attraction to complement the vibrant restaurants, bars, galleries and venues of this stunning cultural and historic precinct.

Source: http://cityevolutions.com

CASE STUDY: Port Arthur Historic Site, Tasmania

Port Arthur is a small town and former convict settlement on the Tasmanian Peninsula in Tasmania, Australia. The site's governing body, the Port Arthur Historic Site Management Authority, has striven to promote the Port Arthur World Heritage Site as a cultural tourism place of international significance by taking a multi-faceted interpretation approach to their tours and experiences.

Ghost Tour

This tour provides a unique experience where visitors have exclusive access to the World Heritage Site after sunset. They are lead by black-coated tour guides who vividly recount real people's documented stories of sightings and unexplained occurrences of the past.

Paranormal Investigation Experience

This experience allows visitors to conduct their own paranormal investigations with the assistance of the latest ghost hunting equipment throughout various buildings at the Port Arthur Historic Site. The Paranormal Investigation Experience allows participants to take readings and measurements and provides the opportunity to judge for themselves whether the ghost stories are true.

Profile Cards

Upon entering the site, visitors are given a card with the profile of a past resident (convict, guard, etc). Visitors can follow their particular residents' story throughout the tour, resulting in visitors establishing a deeper connection to the historical site and a unique experience each time they visit.

"Walking the grounds with only a lantern to light your way is an experience in itself and the guides know exactly how to make the goosebumps rise on even the most cynical tourists."

- TripAdvisor

Source: www.portarthur.org.au

Image courtesy of Tourism Australia

DESTINATION AND REGIONAL STRUCTURE

There is a **need for a destination approach / RTO to engage and gain funds from Destination NSW**. The guiding principles for such an organisation would be that it has a clear but limited role, it does not create duplication with what is happening locally, it strengthens industry buy-in, it encourages strong local tourism organisations, and it actively reduces duplication.

It is envisioned that a staged processes is needed as follows:

YEAR ONE (2014) →

Destination Management Plan	Visitor Economy Partnership	Funding/Resource Audit	Priority Industry Development Actions

YEAR ONE (2014)	TIMEFRAME	RESPONSIBILITY
1. Agreement on the direction and target markets identified in the **Destination Management Plan**	3 Months	TCoN, NTIG
2. MOU with the Hunter Councils to develop a regional **Visitor Economy Partnership** with agreed short-term project priorities (primarily targeting industry and product development)	6 Months	TCoN
3. Establish a **new industry-led peak local tourism body** that links to Visitor Economy Hunter and aligns to the MOU with Hunter Councils to better coordinate industry through the existing partnerships including the BIAs.	9 Months	TCoN, NTIG, BIAs
3. Undertake an **audit of the funding and resources** of each of the current local and regional partners and assess the areas	9 Months	TCoN
4. Implement **priority industry development actions** (*market readiness* mentoring including cruise, *event packaging and bundling*) and seek **synergies in individual marketing efforts**	12 Months	NTIG

DESTINATION AND REGIONAL STRUCTURE (CONT)

YEAR TWO (2015) →

Visitor Economy Team	Collaborative Action Plans	Tourism Opportunity Plan	Priority Development Actions & Marketing Opportunities

YEAR TWO (2015)	TIMEFRAME	RESPONSIBILITY
1. Fund and establish a core **regional Visitor Economy Team**	3 Months	TCoN, BIAs
2. Implement a number of **cooperative projects and develop a collaborative action plans** for the identified growth areas (e.g. *Business & Sporting Events desk*, *VFR campaign*, *Visitor Services review* , leveraging the *growth of accessibility and transport* including the airport)	6 Months	TCoN, NTIG
3. Prepare a **Tourism Opportunity Plan** to identify priority infrastructure and investment needs in light of those already planned (including those in the Urban Renewal Plan and other planning documents)	9 Months	NTIG
4. Implement **priority industry and product development actions** (*Social media* engagement and implementing the review of *visitor services* including booking systems) and **cooperative marketing opportunities** around experiences	12 Months	NTIG, BIAs

YEAR THREE (2016) →

Emerging Niche Action Plans	Annual Joint Marketing Program	Marketing and Development Agreements	Funding for key TOP Projects

YEAR THREE (2016)	TIMEFRAME	RESPONSIBILITY
1. Develop **action plans for emerging niches** including education, outdoor adventure, culture and heritage	3 Months	NTIG
2. Create an **annual joint marketing program** around experiences working from a matrix of experience, markets and niches	6 Months	TCoN, NTIG
3. Establish **marketing and development agreements** with each of Councils partners (Ports Corporation, BIAs, NTIG, Hunter Venues, University of Newcastle, TAFE, etc)	9 Months	TCoN, NTIG, BIAs
4. Seek funding and support for **key projects in the Tourism Opportunity** Plan (e.g. a Convention Centre)	12 Months	TCoN, State and Federal Governments

Section 3 – Destination Requirements

Queen's Wharf

Human & Financial Resources

Human Resources

To be completed by TCoN

Financial Resources

To be completed by TCoN

Key Risks

List the potential risks that could impact your destination. To be completed by TCoN

Risk	Likelihood	Impact	Strategy

Section 4 – Appendices

Merewether Beach

Appendix 1 – Key Stakeholders

The following stakeholders were consulted during the DMP Process:

Organisation	Contact
Chaos2Control	Kathie Heyman
Council & Councillors	
Cre8ing Growth	Ian Mackay
Cruise Hunter	David Brown
East Coast Xperience	Adam Wiseman
Hunter Development Corporation	Jeremy Amann
Hunter Wetlands	Anna Ryan Adam Wiseman Jake Relf
Hunter TAFE	Madelaine Hills Dimitra Roach Nerida Worboys
Hunter Valley Horse Riding	Margaret
National Parks and Wildlife Services	
Newcastle Airport Pty Ltd	Rebecca Wilson
Newcastle Basketball	Ivan Spyrdz
Newcastle Busses/Trams	
Newcastle Ghost Tours	Renata Daniel
Newcastle Kayak	Dave Wood
Newcastle NOW	Evelyn King
Newcastle Museum	Sam Wilcox
Newcomen B&B	Rosemary Bunker
Noah's Quality Hotel	Deb Mackenzie
Novotel	Simon Glover
NSW Forests	
Newcastle Tourism Industry Group	

Organisation	Contact
Olive Tree Markets	Justine Gaudry
Renew Newcastle	Siobhan Curran Marni Jackson
Rollingball	April Howard
Rustica	Will Creedon
Queens Wharf Brewery	Natalie Rembacz
The City of Newcastle	Jan Ross Thea Azures Greg Fenwick Steve Edmonds Cassie Mackay Patrick Moran Georgia Murphy Mark Stratford Christopher Tola Samantha Wilcox
Tourism Hunter	Sheridan Ferrier Valerie Antaki
University of Newcastle	Dr. Paul Stolk Dr. Anne Buchmann Dr. Patricia Johnson Abby Artuso
Wallsend BIA	Max McCorkell

Appendix 2 – Product Audit

Product Type – Accommodation	Location
Apartments	
Chaucer Palms Boutique Bed and Breakfast	Hamilton
Boulevard Serviced Apartments	Hamilton
Central Apartments	Islington
Jesmond Executive Villas	Jesmond
Chifley Apartments Newcastle	Newcastle
Honeysuckle B7 Apartments	Newcastle
Newcastle Serviced Apartments	Newcastle
Quest Newcastle Serviced Apartments	Newcastle
Beachfront Luxury	Newcastle
Terraces for Tourists	Newcastle East
Backpackers and Hostels	
Newcastle Beach YHA	Newcastle
The Cambridge Hotel Backpackers	Newcastle West
Bed and Breakfasts	
Hamilton East Guest Stay	Hamilton
Brezza Bella Bed and Breakfast	Merewether
Cabins and Cottages	
Newcastles Bed and Breakfast	Lambton
Best Western Travellers Motor Village	Mayfield West
Holiday Houses	
Cooks Hill Chalets	Cooks Hill
Hamilton Heritage B and B	Hamilton South
Hotel and Motel	
Tudor Inn Motel	Hamilton
Bimet Executive Lodge	Newcastle
Motels	
Sovereign Inn Newcastle	Mayfield
Self Contained	
Stockton Beach Holiday Park	Stockton

Product Type – Accommodation (Cont)	Location
Hotels	
The Executive Inn Newcastle	New Lambton
Crowne Plaza Newcastle	Newcastle
Ibis Newcastle	Newcastle
Mercure Charlestown	Newcastle
Novotel Newcastle Beach	Newcastle
Quality Hotel Apollo International	Newcastle
Quality Hotel NOAHS On the Beach	Newcastle
Travelodge Newcastle	Newcastle
The Clarendon Hotel	Newcastle
The Gateway Inn Newcastle	Mayfield
The Burwood Inn	Merewether
The Beach Hotel	Merewether
The Albion Hotel	Wickham

Product Type – Attraction	Location
Aboriginal NSW	
Yamuloong Centre	Garden Suburb
Outback Art	Mayfield
Animal	
Blackbutt Reserve	New Lambton
Building and Structure	
Maritime Centre Newcastle	Newcastle
The Bathers Way	Newcastle
Entertainment	
King Street Hotel - Night Club	Newcastle West
Newcastle Panthers	Newcastle West
Food and Wine	
Customs House Hotel Newcastle	Newcastle
Inner City Winemakers	Wickham

Appendix 2 – Product Audit (Cont)

Product Type – Attraction (Cont)	Location
Dining and Eating Out	
The Exchange Hotel - Beaumont	Hamilton
Hamilton	Hamilton
Merewether Surfhouse	Merewether
Rustica Newcastle Beach	Newcastle
CBD Hotel - Newcastle	Newcastle
Hotel Delany	Newcastle
Silo Restaurant and Lounge	Newcastle
Harrys Cafe De Wheels Newcastle	Newcastle
Scratchleys on the Wharf	Newcastle
Estabar Gelati and Espresso Bar	Newcastle East
Wickham Motorcycle Co	Wickham
Galleries, Museums and Collections	
Cooks Hill Gallery	Cooks Hill
John Paynter Gallery Our Place in Space	Newcastle
Newcastle Art Gallery	Newcastle
Newcastle Museum	Newcastle
Lock-Up Cultural Centre	Newcastle
Miss Porters House	Newcastle
Newcastle City Hall	Newcastle
Historical Sites and Heritage Locations	
Convict Lumberyard	Newcastle
Christ Church Cathedral	Newcastle
Newcastle Ocean Baths	Newcastle
Nobbys Beach	Newcastle
King Edward Park	Newcastle
Bogey Hole	Newcastle
Newcastle East Heritage Walk	Newcastle
Fort Scratchley Historic Site	Newcastle East
Maritime	
Newcastle Beach	Newcastle

Product Type – Attraction (Cont)	Location
Natural Attractions	
Dixon Park Beach	Merewether
Merewether Beach	Merewether
TreeTop Adventure Park - Newcastle	Minmi
Hunter Wetlands Centre	Shortland
Stockton Beach	Stockton
Spas and Retreats	
Royal Day Spa	Newcastle
Sports and Recreation	
Go Karts Go	Broadmeadow
Hunter Stadium	Broadmeadow
Newcastle Golf Club	Fern Bay
Newcastle Knights	New Lambton

Product Type – Event	Location
Classes, Lessons and Workshops	
This Is Not Art Festival	Newcastle
Exhibitions and Shows	
Frock On! Newcastle	Broadmeadow
NAB Newcastle Regional Show	Broadmeadow
Newcastle Caravan Camping and Holiday Expo	Broadmeadow
Hunter Valley Electric Vehicle Festival	Newcastle
Festivals and Celebrations	
Darby Street Twilight Festival Bohemia	Newcastle
National Australia Day Maritime Festival	Newcastle
Newcastle Zombie Festival	Newcastle
Real Film Festival	Newcastle
Summer Cinema at the Lighthouse	Newcastle
Newcastle Jazz Festival	Newcastle
Bikefest Newcastle	Newcastle
Down Town Ball 2013	New Lambton
Taste Of The World Beer Festival	New Lambton

Appendix 2 – Product Audit (Cont)

Product Type – Event (Cont)	Location
Markets	
Summer Art Bazaar 2013	Newcastle
Fuelarama	Newcastle
Mattara Festival of Newcastle	Newcastle
The Olive Tree Market	The Junction
Performances	
Department of Education and Trainings Star Struck Program	Broadmeadow
ACO - Brahms Piano Quintet	Newcastle
ACO - Mozart Clarinet Concerto	Newcastle
ACO - Richard Tognetti Presents ACO2	Newcastle
ACO - The Reef	Newcastle
Sporting Events	
Croquet Doubles Carnival	Hamilton
A-League - Newcastle Jets home games	Lambton
National Rugby League - Newcastle Knights Home Games	Lambton
Kathmandu Adventure Series	Merewether
2013 British and Irish Lions Tour	New Lambton
Navy Australian Open Surf Boat Championship	Newcastle
Newcastle Jets v Melbourne Heart (Hunter Stadium)	Newcastle
nib Hunter Festival of Sport	Newcastle
NSW Country Diving Championships	Newcastle
Surfest Newcastle	Newcastle

Product Type – Hire	Location
Cars	
Newcastle Taxis	Hamilton

Product Type – Info	Location
Cars	
Newcastle Visitor Information Centre - Maritime Centre	Newcastle
Newcastle Visitor Information Centre - Hunter Wetlands	Shortland

Product Type – Tour	Location
Extended	
Sydney Weekend Adventures	Newcastle
Full Day	
Tex Tours - Hunter Valley	Maryville
Newcastle's Famous Tram	Newcastle
Newcastle Kayak Tours	Newcastle
Gone Walkabout Safaris	Wickham
Half Day	
Newcastle Surf School	Merewether
Air Sports	Newcastle
Nova Cruises	Newcastle
Surfest Surf School	Newcastle East
Royal Newcastle Aero Club	Newcastle
Night	
Newcastle Ghost Tours	Elermore Vale

Appendix 3 – Key Event/Venue Assets

Key Event/Venue	Location
Natural Areas	
Blackbutt Reserve	New Lambton
Fernleigh Track	Adamstown
The Foreshore	Newcastle East
Tramway Reserve	Newcastle East
Sportsgrounds	
Ballast Ground	Stockton
Connolly Park	Carrington
Dangar Park	Mayfield
Darling Street Oval	Hamilton South
District Park	Broadmeadow
Empire Park	Bar Beach
Empire Park Skate Park	Bar Beach
Federal Park	Wallsend
Griffith Park	Stockton
Jesmond Park	Jesmond
National Park	Newcastle West
Pat Jordon Oval	Carrington
Rawson Park	Stockton
Regent Park	New Lambton
Richardson Park Reserve	Hamilton North
Smith Park	Hamilton North
Wickham Park	Wickham

Key Event/Venue	Location
Parks	
Brake Block Park	Honeysuckle
Civic Park	Newcastle
Dangar Street Reserve	Wallsend
Dixon Park	Merewether
Fort Scratchley	Newcastle
Gregson Park	Hamilton
Henderson Park	Merewether
Islington Park	Islington
Jefferson Park	Merewether
King Edwards Park	Newcastle
Lambton park	Lambton
Nobby's Headland	Newcastle
Wallsend Park Reserve	Wallsend
Webb Park	Mayfield
Beaches	
Bar Beach	Bar Beach
Dixon Park Beach	Merewether
Horseshoe Beach	Newcastle East
Merewether Beach	Merewether
Merewether Ocean Baths	Merewether
Newcastle Beach	Newcastle East
Newcastle Canoe Pool	Newcastle East
Newcastle Ocean Baths	Newcastle East
Nobbys Beach	Newcastle East
Stockton beach	Stockton