



NEWCASTLE

VISITOR ECONOMY VISION FOR THE CBD
FINAL REPORT
July 2015

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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

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

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GLOSSARY: DATA SOURCES

- All 2014 and 2030 visitor profiles and forecasting data referred to in this report, unless otherwise stated, is sourced from the International Visitor Survey (IVS) and National Visitor Survey (NVS) from Tourism Research Australia (TRA), Tourism Forecasting Committee forecast rates, Tourism Australia 2020 Forecasts by Deloitte Access Economics, and EC3 Global.

¹ p.10, Newcastle Port Corporation,
<http://www.newportcorp.com.au/>

² p.10 & 42, City of Newcastle,
<http://www.economicprofile.com.au/newcastle>

³ p.11, Estimates based from Tourism Satellite Account, NSW data for 2013-14

⁴ p. 12, 31 & 42, Lower Hunter Regional Strategy, 2006-2031

⁵ p. 15, City of Newcastle

⁶ p. 15, Accommodation forecasts are based on occupancy rates from Australia Bureau of Statistics (ABS), accommodation data from TRA, and forecast rates from TFC and Deloitte Access Economics.

⁷ p.26, AEC Group, Economic Impact Assessment of the Cruise Shipping Industry in Australia, 2013-14, <http://www.cruisedownunder.com>

⁸ p.41, Australian Tourism Data Warehouse and Visit Newcastle

⁹ p.42, Newcastle Airport, Economic Impact Analysis: Current Operation and Proposed Expansion, July 2014,
www.newcastleairport.com.au/Economic_impact_assessment_2014

¹⁰ p.42, Destination New South Wales Snapshot, Year ended September 2014, <http://www.destinationnsw.com.au/wp-content/uploads/2014/04/Total-NSW-snapshot-YE-Sep-14.pdf>

¹¹ p.42, Newcastle Port Corporation Annual Report 2013-14
http://www.newportcorp.com.au/client_images/1661880.pdf

¹² p.42, Hunter Stadium <http://hunterstadium.com/page/stadium-history>

¹³ p.42 University of Newcastle, <http://www.newcastle.edu.au/>



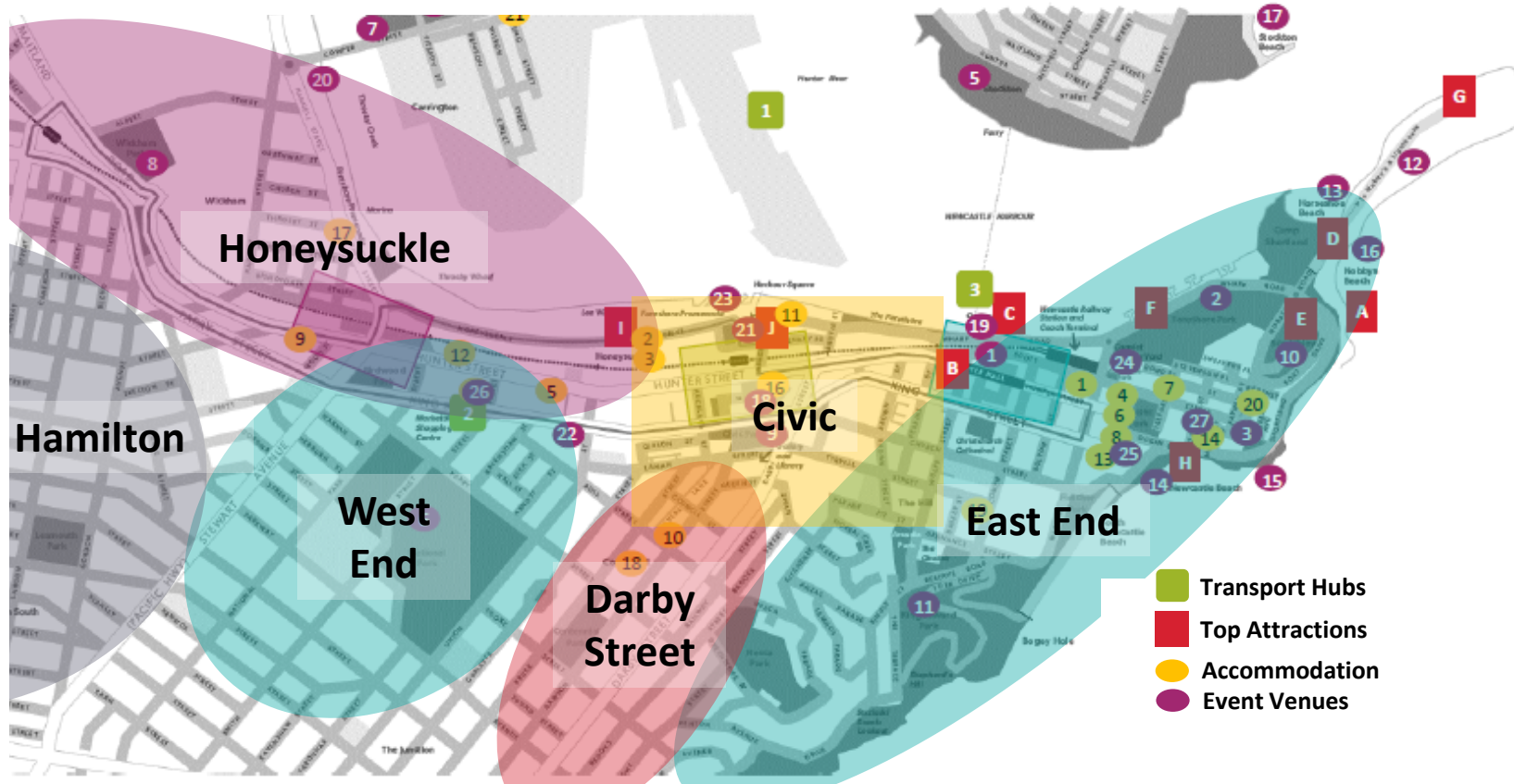
THE NEWCASTLE CBD VISITOR ECONOMY VISION

Newcastle City Council, in partnership with the Newcastle Tourism Industry Group, industry operators, and businesses and BIAs have produced this CBD Visitor Economy Vision to clearly articulate the opportunities for Newcastle to meet the 2030 targets of the residents and community articulated through the Destination Management Plan (DMP) from mid-2013.

The area defined as the CBD is that shown on the map below, and the Vision is in two parts:

PART A: Vision and Direction by market

PART B: Visitor Precincts Action Plans



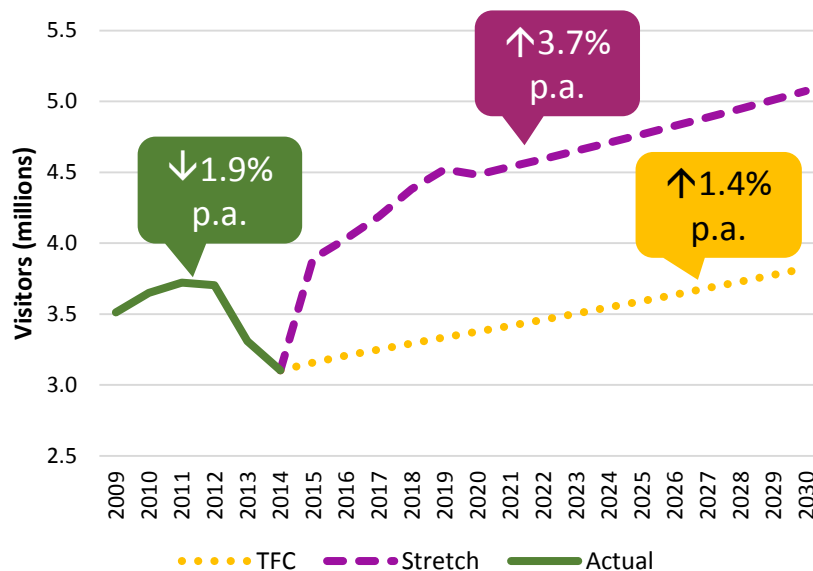
THE PLANNING AND STRATEGIC CONTEXT

Development of the CBD Vision is underpinned by a set of strategic assumptions regarding policy focus, demand drivers and knowledge of investment and development.

Strategic tourism assumptions

The strategic direction and goals set out in the 2013 Destination Tourism Plan remain entirely valid in the context of preparing this plan:

1. A unified voice for the businesses engaged in the Visitor Economy;
2. Getting the industry connected;
3. Engaging the global social and community networks that love our experiences; and
4. Create signature experiences: starting with the East End.



Newcastle 2030 strategic directions

A Connected City

- Effective and integrated public transport
- Linked networks of cycle and pedestrian paths

A Protected and Enhanced Environment

Vibrant and Activated Public Places

- Public places that provide for diverse activity/strengthen social connections
- Culture, heritage and place are valued, shared and celebrated
- Safe and activated places that are used by people day and night

A Caring and Inclusive Community

A Liveable and Distinctive Built Environment

- A built environment that maintains and enhances our sense of identity
- Mixed-use urban villages supported by integrated transport networks

A Smart and Innovative City

- A vibrant, diverse and resilient green economy built on educational excellence and research
- A culture that supports and encourages innovation and creativity at all levels
- A thriving city that attracts people to live, work, invest and visit

Open and Collaborative Leadership Planning Process



THE PLANNING AND STRATEGIC CONTEXT – NEWCASTLE ECONOMIC DEVELOPMENT STRATEGY

The Newcastle Economic Development Strategy establishes where the Newcastle City Council can add value to economic growth.

Council's economic development roles are recognised as including;

- Advocacy for the community
- Ensuring appropriate and integrated strategic and statutory planning documents
- Promotion of major infrastructure needs
- Visitor economy leadership
- Facilitating access to business assistance programs
- Facilitating business improvement associations
- Statistics and information
- Licence processing and approval.

The Strategy recognises that a range of key programs will shape the future economic development of Newcastle, including;

- City centre revitalisation – regeneration of the city as a place to live, work, invest and visit
- The NSW Government's introduction of light rail to Newcastle as part of a strategy to revitalise the Newcastle city centre
- Newcastle Port Development
- Development of the visitor economy
- City university precinct – University of Newcastle city campus as a catalyst project
- Digital connectivity in the smart city
- Strengthening of local areas and precincts
- Developing workforce skills for a knowledge based future

Newcastle Economic Development Strategy

The strategy is built around the vision and objectives of the Community Strategic Plan, industry and stakeholder consultation and data analysis to identify Council's role and responsibilities.

This strategy focuses on five key areas:

1. Role as the capital of the Hunter Region

- Recognise and strengthen Newcastle's role the regional capital and hub for industry, health, business, personal , and logistic services

2. The development of key infrastructure

- Work with businesses, community and government to facilitate the development of key infrastructure to improve business performance

3. Supporting business growth and employment

- Revitalise the city centre and local precincts through support of existing businesses and industries. Facilitate the generation of new sustainable job opportunities. Seek to maintain major regional industries that are linked to national and international markets

4. Encouragement of innovation and creativity

- Encourage innovation in business, research activities, education and creative industries

5. Developing the visitor economy of Newcastle

- Work with the tourism sector and industry associations to further develop Newcastle as a visitor and event destination.



UNIQUE SELLING PROPOSITION

The Newcastle CBD offers a range of both active and passive experiences which contribute to the destination's unique selling proposition. These four experiences are what make a visit to Newcastle special and play a major role in deciphering the region's competitive advantage.

These four 'hero experiences' are used to define the best uses in the precincts and to identify opportunities to create a thriving visitor economy built on Newcastle's unique selling proposition.

A city on the beach

Few cities in the world have a surf beach in walking distance to their CBD. Only two of the World Surf Cities are in Australia and Newcastle is one of them.

This offers unique vantage points, unique event spaces and opportunities for mixing business and leisure.



A working harbour

As the largest coal port harbour in the world, and an emerging cruise wharf, there is always something happening on Newcastle Harbour. This offers a range of unique opportunities from dining or meeting with a full view of the harbour to using the water as a transport option.



Events Gateway

Newcastle has been named as a World Festival and Event City for the second time by the International Festivals and Events Association (IFEA) and acts as both a host and gateway to sporting, cultural and community events in the greater Hunter region.



Living Heritage

The maritime and industrial heritage of the city is alive and well in the preserved heritage buildings and the people and stories of the city.

Opportunities abound for adaptive re-use of heritage and industrial buildings, and many excellent examples exist to create a story of a city with a balance of old and new.



PART A: VISION AND DIRECTION





NEWCASTLE CBD VISITOR ECONOMY VISION & STRATEGIC PRIORITIES

The vision for Newcastle CBD is to be recognised as the “**Visitor Economy Capital of Regional NSW**” hosting major events and being a destination of choice for both leisure and business travel. The CBD Vision has four strategic priorities, underpinned by identified catalyst projects and enablers to drive the CBD revitalisation towards the 2020 target.

STRATEGIC PRIORITIES

1

The biggest share of regional business events in NSW

Catalyst Project: development of a major new standalone **exhibition and conference facility** venue in the preferred location at Cottage Creek, capable of catering for events of up to 2,000 pax

Enabler: attract **new hotel development** in and near the Honeysuckle Precinct to support the Convention Centre

2

Events capital of regional Australia

Catalyst Project: a series of ‘**plug-and-play**’ **event spaces** in the CBD to facilitate leisure and business events that showcase the city assets (beach, heritage, harbour)

Enabler: seamlessly linking city assets and precincts with the planned **light rail and multi-modal ticketing system**.

3

Local ambassadors drive visiting friends and relatives

Catalyst Project: ensure every visitor leaves with a positive impression, some amazing photos and an understanding of the city. Develop a **smart phone App** that will consolidate and link Newcastle’s web-based visitor information creating a smart city wayfinding platform.

Enabler: A **strategic wayfinding program** informed by visitor need, including WiFi and digital hubs in spaces that showcase the city’s assets and help to share the story with visitors so they can share it with the world through social media.

4

Delivering signature moments for the leisure market

Catalyst Project: Create signature experiences in each of the precincts that appeal to the growing leisure markets. Develop iconic lookouts to create features and linkages between precincts and experience nodes. Suggested locations include Nobby’s Head, Christchurch Cathedral, Memorial Walk and Tramway Reserve (Murray Avenue).

Enabler: Development of the new **dedicated Cruise terminal**

THE NEWCASTLE ECONOMY

KEY FACTS



2nd largest city in NSW and
2nd oldest in Australia



**Australia's largest coal export
harbour¹**



**Gross Regional Product of
\$14.044 billion** (2.85% of the NSW's
Gross State Product)²



Manufacturing is the city's largest export
sector (37.25%)²



87,489 local jobs (health care and social
assistance is the largest employer 18%)²

*"Leadership is everything - People need to take risks. You
can't wait another 20 years, because in 20 years the whole
world has changed."*

Tom Murphy, prev. Pittsburgh Mayor

PITTSBURGH CASE STUDY – Rise from Rust

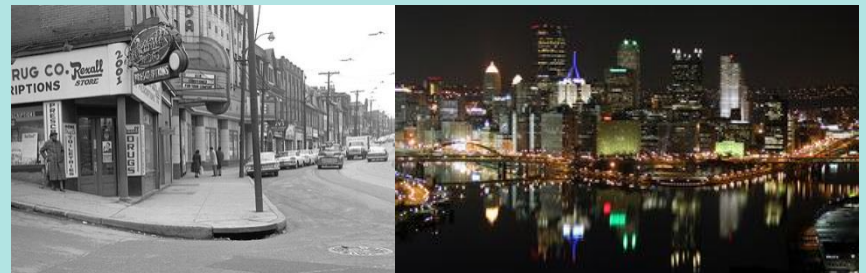
Over 30 years, Pittsburgh has been transformed from an industrial city with high unemployment, to a thriving cultural city. During the early post-war years, Pittsburgh produced half of America's steel, however during the early 1980s, the steel era came to an abrupt end. This led to a shift, with the economic focus transforming to health care, higher education, financial services and advanced technology. Pittsburgh grew as a result of both political leadership and corporate vision, with each success feeding upon each other.

Pittsburgh success was due to many factors, including:

- Taking advantage of its natural assets– i.e. its three rivers;
- City's location to near markets North East; and
- Its neighbourhoods and its people.

Pittsburgh reclaimed the city's riverfronts for recreational purposes, realised its residential opportunities Downtown, built a new highway to the North and new subway system, developed a new sports stadium, new airport, and Cultural District. Together, these brought young people to the city and counteracted the population loss. By diversifying its economy and improving its streetscape, the Steel City became a new hub for the creative class and is now focused on the future and liveability.

Pittsburgh has now been ranked as one of America's most lovable locations, and one of the most affordable big cities in the US, as well as one of the best all-American vacations for 2014 (The Travel Channel).



Reflections of Pittsburgh Photo credit: [michaelrighi](#)

THE NEWCASTLE VISITOR ECONOMY IN 2014 & 2030

Tourism is a part of the broader visitor economy which includes all leisure travel and travel associated with business, events, visiting friends and relatives and for the purposes of health or education.

Based on estimates from the International and National Visitor Surveys, the visitor economy injects **approximately \$699 million in visitor expenditure** into Newcastle's economy. This in turn generates an estimated **overall expenditure impact of \$1.43 billion** (direct and indirect expenditure) across sectors including transport, accommodation, food services, and retail trade.

Visitor expenditure also supports a range of infrastructure including restaurants, airports and cultural facilities which actively contribute to developing liveable communities.



Ranked as one of the **world's top ten places to visit** by Lonely Planet in 2011



18,011 visitors stay in the region every night (3.1M per annum) injecting **\$1.1M a day** into our economy



Supports approximately **9,000 jobs** (10% of all jobs in the region)³

By natural growth (1.4% per annum), Newcastle will see an estimated 3.8 million visitors and 7.7 million visitor nights by 2030.

At the stretch growth of 3.7% per annum (aligned to Australian tourism targets) the City will see 5.1 million visitors and 9.6 million visitor nights by 2030¹.

At the stretch target of 3.7% per annum growth this equates to:



1,800 new rooms required by 2030
(or 1,000 new rooms with natural (TFC) growth).



503 seats per day required on public transport by 2030 for visitor usage (381 seats per day with TFC growth).



5,253 car parks per day required by 2030 for visitor usage (city-wide) (3,961 car parks per day with TFC growth).



\$1.75B in estimated spend by 2030
(an additional \$1B from its current value).

THE POTENTIAL FOR TRANSFORMATION

POPULATION GROWTH: Newcastle is predicted to have the 2nd largest population growth and 4th largest overall population in NSW metropolitan areas by 2031 (excluding Sydney) Population in the Inner City is projected to increase by 6,900 persons or 13% by 2031⁴.

ECONOMIC GROWTH: The city has undergone a major transformation over the last two decades. In particular, there has been growth in knowledge industries, with the expansion of health, higher education, research centres, defence industries and professional and technical services. These industries, along with the traditional energy and engineering sectors, are providing the foundation for future growth of Newcastle and the broader region.

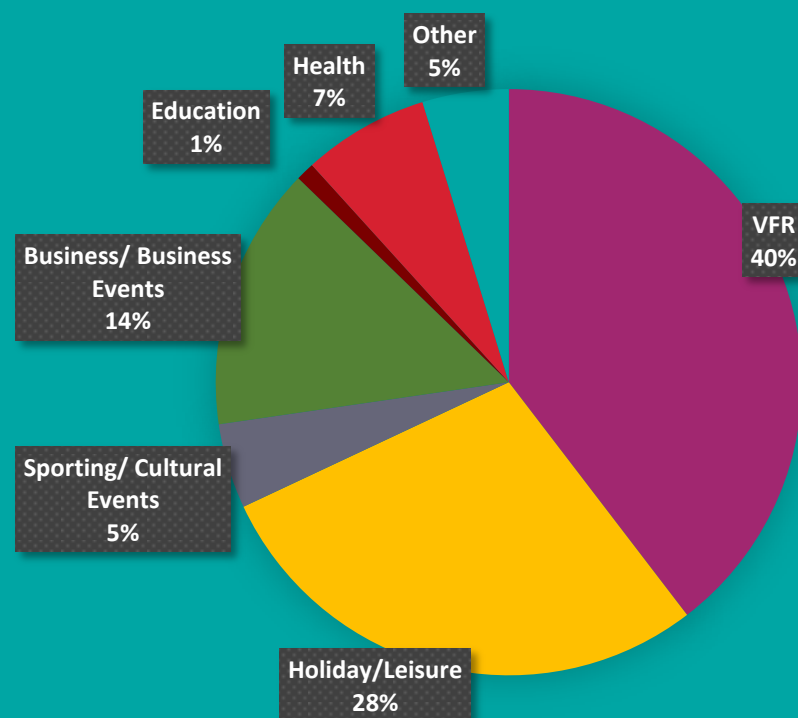
IMPROVED ACCESS: The recent completion of the Hunter Expressway has improved access to the region for key visitor markets. The \$80 million expansion of the Newcastle Airport will more than double the size of the existing terminal and increase annual passenger capacity from 2 million to 5 million over the next 20 years.

SMART CITY CONNECTIVITY: The city is entering a commercial partnership for the delivery of an unmatched Wi-Fi and digital connectivity infrastructure that will provide a platform for future growth. Combined with visitor services and planning which is informed by visitor need, effective wayfinding to connect the City's visitor precincts will be a key enabler.

COMMITMENT TO GROW: The NSW Government is introducing light rail to Newcastle as part of a strategy to revitalise the city centre, boost economic activity and reinforce the city's role as a 21st century regional centre. By removing the barrier of the heavy rail line, and opening up significant areas of the rail corridor for public use, the city centre can be re-united, providing opportunities to grow connectivity. Plans for investment are already underway including private investment in new hotel stock, the East End Urban Growth/GPT development and the new University precinct. The renewal of the CBD as a great place to live, work and play is being progressed as a collaboration between the Newcastle Urban Renewal Strategy, City Centre (Hunter St) Revitalisation Project and Newcastle NOW are revitalising the City through strengthened retail, legal, educational and cultural precincts.

The potential of the visitor economy

Today the visitor economy is worth \$699M in direct expenditure and it has grown in volume at 6% per annum since 2006. The 2020 forecast is for 1%-4% growth per annum. At peak times this could equate to **an additional 17,400 visitors per day** travelling to see friends and relatives, for leisure and for special events (see current breakdown of purpose of visit below).



GROWTH POTENTIAL BY MARKET

The Destination Management Plan (2013) identified four market segments with the greatest potential for growth, these are guiding the CBD Visitor Economy Vision.



Business Travel and Business Events

- An extra **273,800 visitors** by 2030 (up to 3,000 a day at peak times)
- **Spending \$276.1M** directly in 2030



Leisure Events (cultural and sporting)

- An extra **90,900 visitors** by 2030 (up to 20,000 a day at peak times)
- **Spending \$50.0M** directly in 2030



Visiting Friends and Relatives

- An extra **760,650 visitors** by 2030 (up to 8,500 a day)
- **Spending \$641.4M** directly in 2030



Holiday Visitors

- An extra **583,300 visitors** by 2030 (up to 10,200 a day)
- **Spending \$376.0M** directly in 2030

IMPLICATIONS & OPPORTUNITIES FROM GROWTH



Attractions and Experiences

The predicted growth will support a **broader range and higher quality of attractions and tours**. A co-ordinated 'whole of Newcastle' approach to destination planning and management is required in order to deliver a compelling set of connected experiences which entice new visitors and encourage repeat customers.



CBD Services – Retail , Food & Drink

Increased visitor volumes will **increase demand for CBD services** such as retail, food and drink. Consideration should be given to the different sources of demand in terms of education, business and leisure audiences and the services (and locations) required for those markets.



Entertainment Spaces and Visitor Hubs

Establishing and developing **multi-use spaces and hubs** for visitor activity and events, including the potential to align these with the planned new light rail route. Development of the night-time economy and entertainment precincts is a key priority which will only be achieved through considered design.



Workforce

Increased demand for an estimated 13,500 additional employees in the hospitality and related visitor economy sectors in 2030 (up from 9,000 employees today).



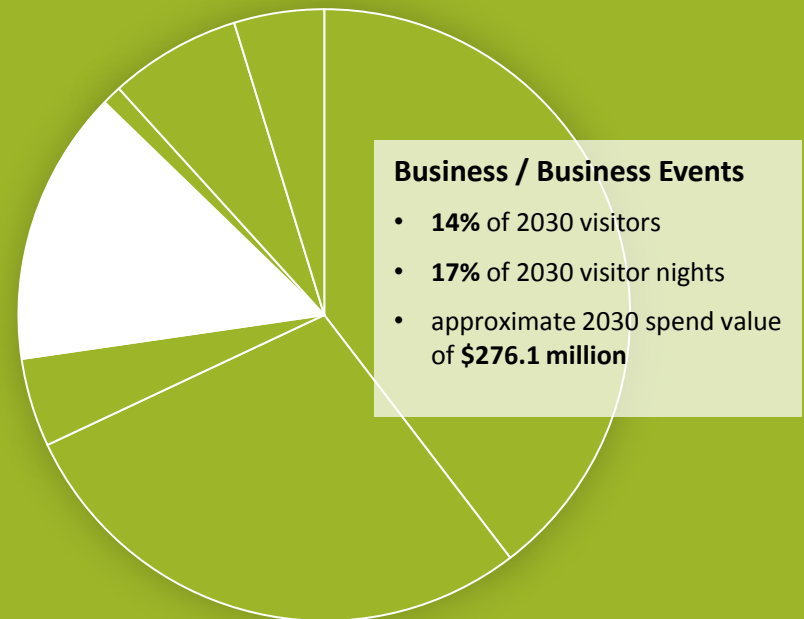
1. BUSINESS & BUSINESS EVENTS LED GROWTH

The highest daily yield of any sector of the visitor economy is produced by business events at \$212 per night in 2010, compared with \$136 per night for all overnight visitors in Australia. Business events provide a perfect opportunity for mid-week visitation in the Newcastle CBD

Growth will be facilitated through:

Catalyst Project: development of a major new standalone exhibition and conference facility venue in the preferred location at Cottage Creek capable of catering for events of up to 2,000 pax.

- **Leveraging conference centre development** to attract development of ancillary and support services in the vicinity of the centre including hotels, restaurants and other event venues;
- Positioning Newcastle as a **meeting and conference destination**, building on the region's attractors and appeal;
- Capitalising on a **growing economy** – maximising related meetings and business activity;
- Ensuring the city's assets are seamlessly connected through the development of a **comprehensive approach to wayfinding and connectivity**, including taking full advantage of light-rail and an integrated, multi-model ticketing system.



An additional
273,800 visitors
by 2030



PEAK LOAD SCENARIO



3,000 visitors



440 extra
rooms per night



60 extra
seats per day



2,400 extra car
spaces at peak



Investment



Integration



Conference
Venue

ENABLER OF GROWTH



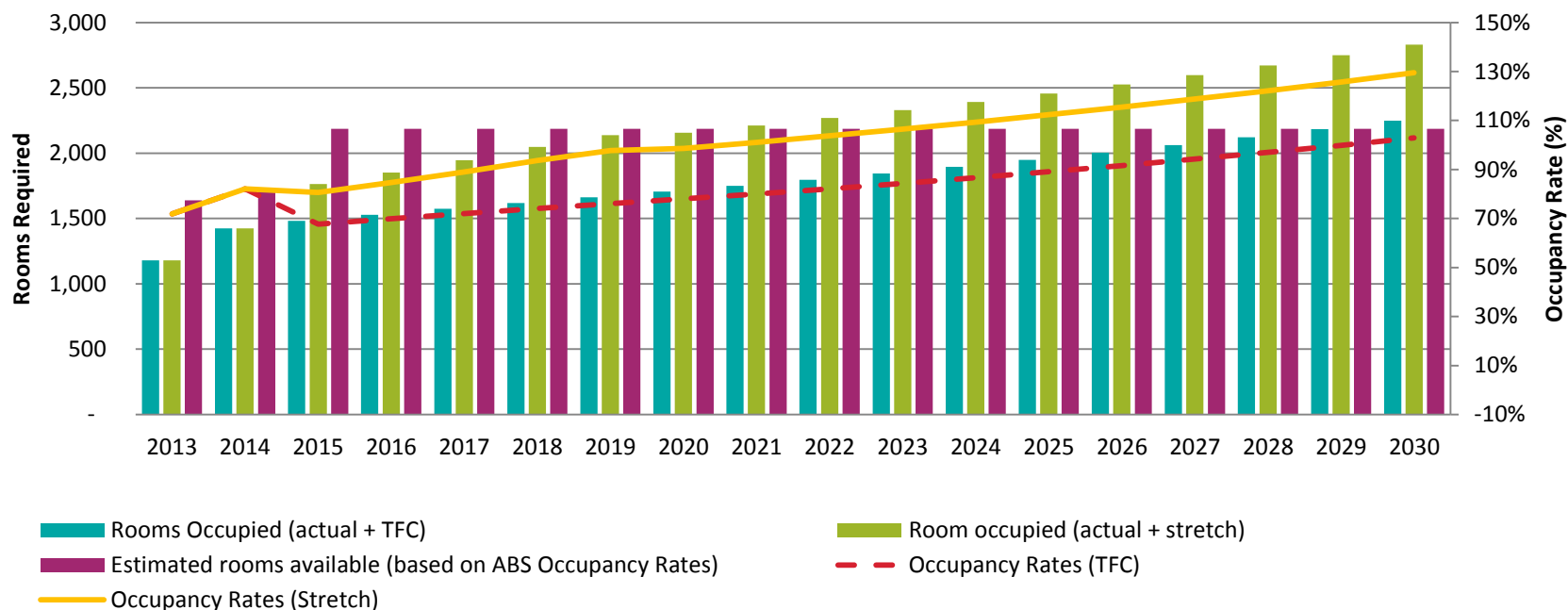
Accommodation

- Under this stretch growth scenario, **forecast visitor nights in commercial accommodation demand for Newcastle are estimated to exceed both current and planned supply by 2030**. This will support a **growth in room stock of over 1,800 rooms between 2015 and 2030** based on the industry standard for commercial investment when the annual occupancy rate reached 70%⁶.
- Identifying potential sites for new or expanded accommodation and attracting investment will be key considerations.

DA APPROVED ACCOMMODATION⁵

Description	Capacity (rooms)	Expected Completion
1. Stage 1 of East End accommodation development	200	2014-15
2. Heritage re-use of Castlemaine & Wood Bros Brewery (serviced apartments)	47	2014
3. Redevelopment of Lucky Country Hotel	50	2014
4. Wharf Rd Hotel and Conference Facility	??	2017
5. Jolly Roger site apartments	250	2015

Forecast Accommodation Data



BUSINESS TOURISM OPPORTUNITIES

Approximately 10,900 international, 225,000 domestic overnight and 223,000 domestic day visitors to Newcastle came for business purposes in 2014 (YE Sept). The stretch forecasts suggest potential growth in business/business event visitors by 2030 to approximately 732,600 (an additional 17,100 per annum), up from 458,800 in 2014.

To support the growth in this market, the following priority projects have been identified. A major new standalone **exhibition and conference facility** venue in the preferred location at Cottage Creek can be a **gamechanger** for the City to achieve a step change in levels of business tourism activity. It should be noted that while there is sufficient quality room stock, parking and attractions to cater for the current market, at the 2030 target (which does not include a convention centre) an additional 440 rooms, new attractions and integrated transport across the precincts will be required.

A Catalyst Project: Development of a 2,000 pax purpose built convention centre with multipurpose floor space for events.

B Enabler: Attract investment into business and leisure hotels across the Honeysuckle and Civic precincts.

C Connect city precincts with multi-modal transport including **new water-based transport** to the planned Convention Centre as part of an overall wayfinding and connectivity strategy.

D Create an integrated **multi modal ticketing system** to connect the precincts of the Newcastle CBD, including ferry links from the Channel Berth.

E Reinvalidate the existing attractions, particularly those managed publicly, to be world-class attractions suited to the conference market. Once the convention centre is established encourage the development of new attractions in the Civic precinct e.g. an aquarium, revitalised art gallery, etc.

F Encourage the development of **multi-level carparks** in the West End and Honeysuckle Precincts.

Case Study: Cairns Convention Centre

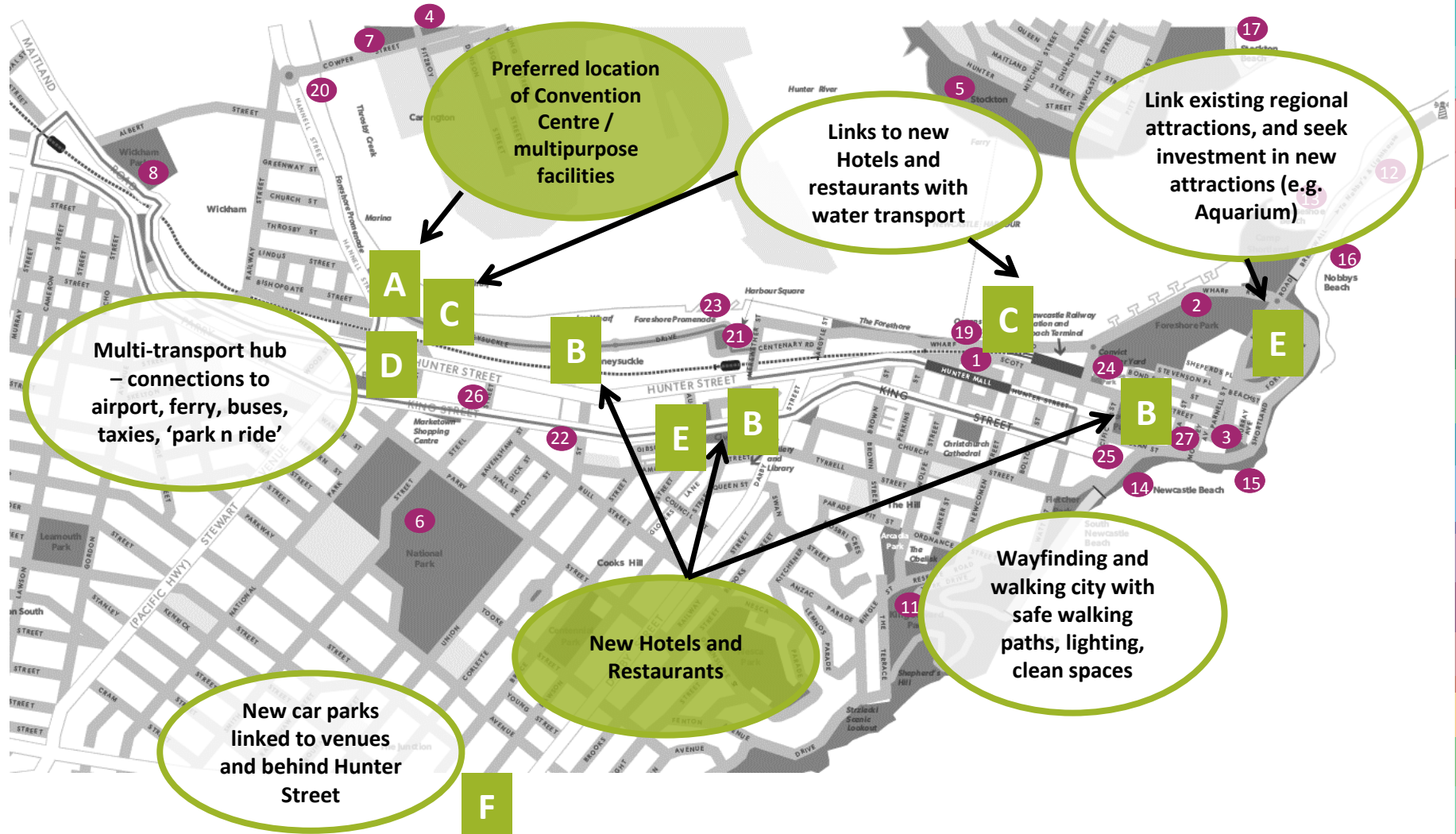
The Cairns Convention Centre, opened in 1997, is a large multi-purpose venue designed for a wide range of events including concerts, exhibitions, conventions, meetings. It is located within Cairns Regional City and is just 10 minutes from the Cairns International Airport. The centre can seat up to 5,000 delegates, with an extensive choice of over 7,000 world-class accommodation rooms within close proximity and walking distance to the Cairns Convention Centre.

This award-winning centre is renowned for its unique environmental design, boasting several green features such as a double-layer pleated plate roof that provides half of the centre's grounds and garden water requirements. The centre is Australia's first environmentally designed major public building, formed from a combination of steel and laminated plantation timber.

The Centre is a major events venue for Cairns, featuring as an ideal venue on Events Cairns & Great Barrier Reef. Over 600 tours can depart daily to outstanding natural wonders which showcase the region. The Centre is world renowned, and it has been within the top four convention centres in the world from 2002-2012.



BUSINESS TOURISM VISION – WHAT DOES IT LOOK LIKE?





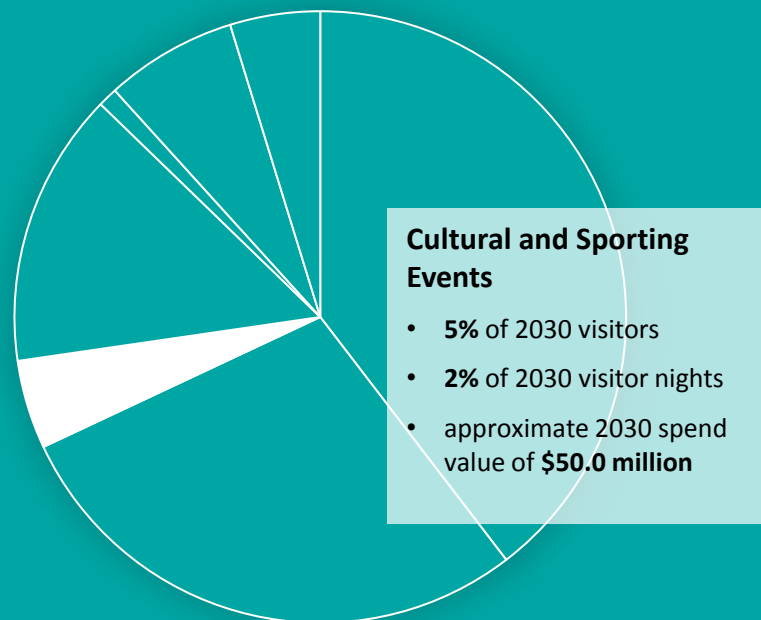
2. EVENT LED GROWTH

Cultural and sporting events provide opportunities to increase direct expenditure, facilitate media coverage, promote awareness of the destination for future visitation and lead to the construction of new facilities and infrastructure.

Growth will be led through:

Catalyst Project: a series of **'plug-and-play' event spaces** in the CBD to facilitate leisure and business events that showcase the city assets (beach, heritage, harbour)

- **Strengthening the annual events program** with more unique local events to build the destination's overall vitality and viability as well as more **major sporting events**;
- **Leveraging access and infrastructure** developments to attract new significant events (e.g. Newcastle Airport and Hunter Expressway); and
- Implementing a **destination-wide approach to event management** which adds to the quality of visitor experiences, and adds to Newcastle's competitiveness as an event destination of choice.



An additional
90,900 visitors
by 2030



PEAK LOAD SCENARIO



20,000 visitors
for CBD events



3,100 extra
rooms per night



1,170 extra
seats per day



9,145 extra car
spaces at peak



Infrastructure



Integration



Venues

ENABLER – LIGHT RAIL AND INTEGRATED TRANSPORT

The Newcastle region currently welcomes approximately 220 international, 55,800 domestic overnight and 91,600 domestic day-trip visitors who participated in a sporting or cultural event during their stay (2014 YE Sept).

If the current visitor profile is retained, forecasts suggest potential growth in cultural and sporting event visitors to 238,600 by 2030 (an additional 5,700 visitors per annum), up from 147,700 in 2014.

With event development, it is anticipated that numbers would grow incrementally over the 15 year time horizon.

The light rail will travel east from the new Wickham transport interchange along the existing rail corridor, before moving south to connect with Hunter Street and Scott Street and terminating at Pacific Park.

Hunter Stadium and Newcastle Entertainment Centre are key large scale venues for the city. Although outside the CBD, they will also generate significant impact, in terms of connectivity and footfall.

Similarly, it is essential that the cruise terminal at Channel Berth is well connected as part of an integrated CBD transport solution.

Peak Load Scenario

20,000 visitors for CBD events (with 51% of overnight visitors staying in commercial accommodation, 6% visitors using public transportation and 91% of visitors self-drive)

- **3,100 rooms** required per night
- **1,170 public transit seats** required per day
- **9,145 car spaces** required per day (car occupancy rate of 2 persons)



Public transport

Based on current visitor usage patterns, there will be an **increased visitor use of public transport per day of up to 1,170 visitors per day for major events**. Additional infrastructure considerations include:

- Significantly improved connectivity provided by light rail;
- Additional parking provision including park and ride;
- connections between event venues and the CBD/ transport interchanges
- Consideration of new ferry service linking Civic and Honeysuckle



Infrastructure

The current events infrastructure is spread across the CBD requiring seamless integration of bus, planned light rail, and ferry services. This will require new inter-modal linkages at hubs (bus parking, etc)



Integration

Wayfinding, signing, and interpretation will be required to ensure easy orientation for visitors.



Venues

Dependent on the growth of events over the 2030 timeframe, a venue development and acquisition strategy may need to be pursued to provide additional indoor and outdoor capacity for large/small-scale formal and informal events.

EVENT TOURISM OPPORTUNITIES

The Newcastle region currently welcomes approximately 220 international, 55,800 domestic overnight and 91,600 domestic day-trip visitors who participated in a sporting or cultural event during their stay (2014 YE Sept). The forecast potential growth in cultural and sporting event visitors is an increase to 238,600 by 2030 (an additional 5,700 visitors per annum).

While Hunter Stadium and Newcastle Entertainment Centre are outside the CBD, they will also generate significant impact, in terms of connectivity and footfall. The opportunity is to leverage these and other venues (such as the planned convention centre) with a range of inter-connected venues throughout the CBD.

A

Catalyst Project: a network of CBD event spaces with base infrastructure allowing 'plug-and-play' events including Foreshore Park, Honeysuckle Precinct (live telecast sites for sporting events), Art Gallery and Civic forecourt.

B

Enabler: Seamlessly linking city assets and precincts with the planned light rail.

C

Develop a **multi-modal ticketing system** similar to the London Oyster Card which could also include access to key attractions.

D

Wayfinding signage and digital systems are required to create a seamless experience of the city.

E

Additional accommodation, restaurants and supporting services are needed to service events. These will grow as events grow but also need to be a focus of the investment attraction and economic development of the city led by Council.

F

Redesign Hunter Stadium precinct for multi-use events.

CASE STUDY: GOLD COAST LIGHT RAIL (linking convention centre and beaches and accommodation)

Officially launched on July 20, The Gold Coast light rail system provides the city with a modern and more sustainable rapid transit system, reducing car reliance, and is located within walking distance to more than 20% of Gold Coast residents and 50,000-60,000 overnight visitors, by providing a close transport system to the hotels along the coast. The system provides another transport option for residents and visitors attending events.

The first stop begins at Gold Coast University Hospital and connects passengers to 16 stations across 13km, including through the popular locations of Southport, Main Beach, Surfers Paradise and Broadbeach (Gold Coast Convention Centre). The light rail system also connects passengers with the bus network at interchanges, providing easy connection and short waiting times between services.

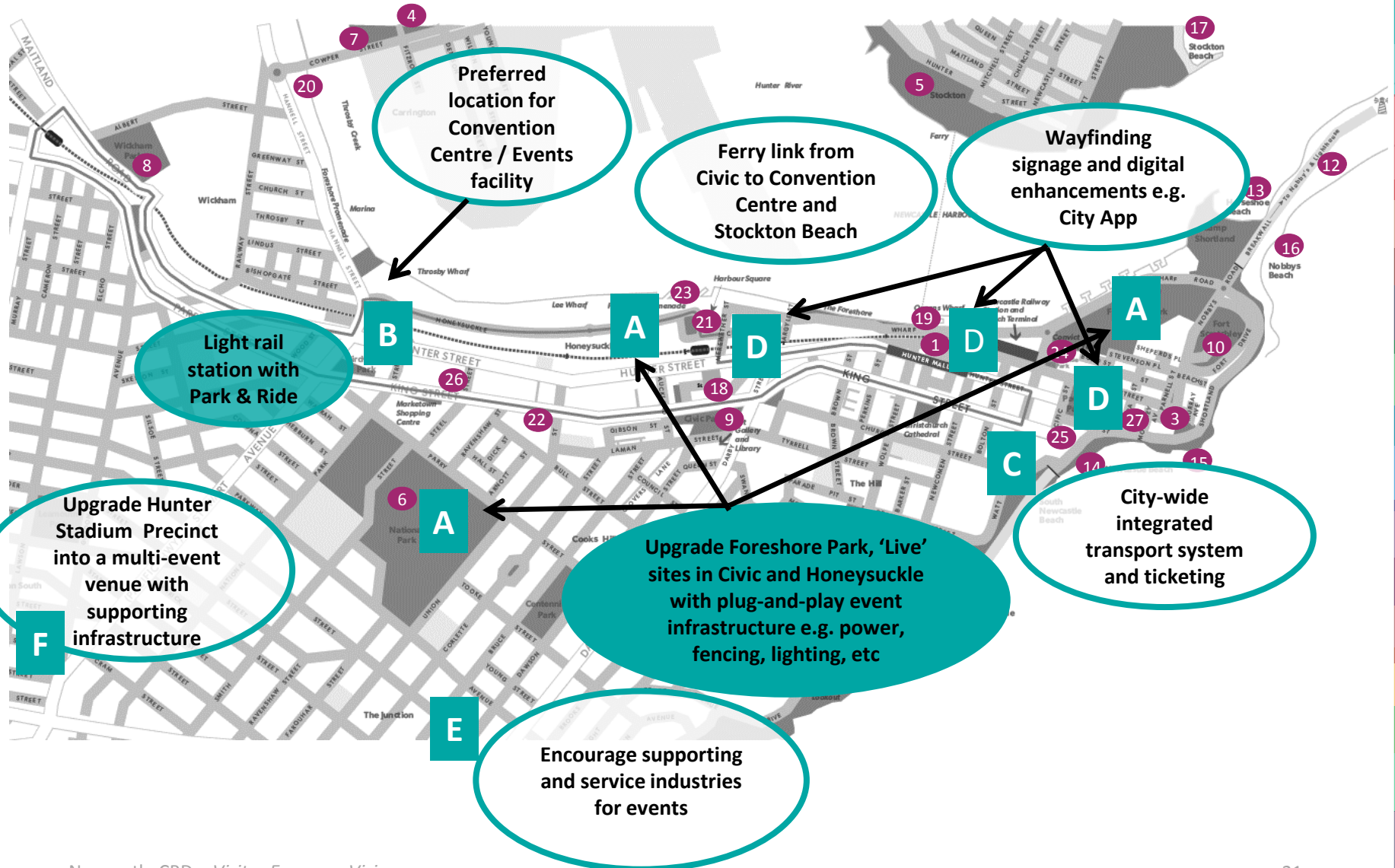
The light rail runs every 7.5-15 minutes on weekdays, and every 10-30 minutes on weekends.

The system also features an app, My G, containing easy to access information on the system to commuters to access information on services, station locations and ticket sellers. The app also links to the Translink journey planner and provides real time service alerts.



Sources: ridetheg.com.au and The Transport Position Paper, TTF Australia 2010

EVENTS TOURISM VISION – WHAT DOES IT LOOK LIKE?





3. VFR LED GROWTH (INCLUDING EDUCATION)

In NSW (YE Sept), VFR visitors contributed 522 million visitor nights (34% of State total) and on average, they spent approximately \$79/night. A snapshot on the VFR market indicated that this travel market is a significant contributor to NSW's economy, especially when accommodation costs are removed, as VFR visitors spend more overall compared to regular visitors.

Catalyst: ensure every visitor leaves with a positive impression, some amazing photos and an understanding of the city. Develop a **smart phone App** that will consolidate and link Newcastle's web-based visitor information creating a smart city wayfinding platform.

VFR:

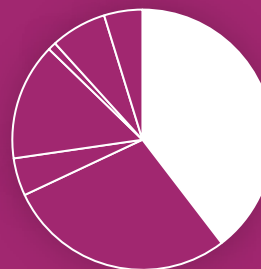
Growth will be led through:

- **Forecast population growth** of 14.8% by 2036.
- Leveraging through **targeted marketing campaigns and product packages**.
- **A Team Newcastle** approach – residents performing roles as ambassadors and advocates for the city.
- Creating **mobile engagement** and improved wayfinding and interpretative signage to connect locals and visitors with the stories of the city.
- The creation of **new attractions** for the VFR market and better linkages between the existing attractions
- A **dedicated VFR campaign** to 'get to know your city' will be needed to engage locals in the stories of the town

Education:

Growth will be led through:

- **Increased influx of visitors via** the education market (primarily out of Asia), fly-in-fly-out coal industry workers and the defence base.
 - The **University of Newcastle's new CBD campus** coming on stream for the 2017 academic year – adding 2,500 students and staff into the CBD;



Visiting Friends and Relatives

- **39%** of 2030 visitors
- **37%** of 2030 visitor nights
- approximate 2030 spend value of **\$641.4 million**

An additional
760,650 visitors
by 2030



PEAK LOAD SCENARIO



8,500 visitors



140 extra
rooms per
night



290 extra
seats per day



1,320 extra car
spaces at peak



Infrastructure



Integration



CBD Services



Attractions,
Experiences &
Events

VISITOR TRENDS

Approximately 23,600 international, 532,500 domestic overnight and 685,800 domestic day visitors to Newcastle came to visit friends and relatives in 2014 (YE Sept). That is 39% of visitor numbers. If the current visitor profile is retained, forecasts suggest potential growth in VFR visitors by 2030 to approximately 2.0 million (an additional 47,550 visitors per annum), up from 1.2 million in 2014.

In addition to local VFR, there is significant potential to attract VFR from students moving to the city. In 2030 it is estimated that the region could attract **22,500 visitors (education VFR)** (with 3% of overnight visitors staying in commercial accommodation, 9% visitors using public transportation and 75% of visitors self-drive).

Recent research on the VFR market shows that it is significantly larger than the tourism statistics show worth an estimated \$15B annually. The research, by MyTravelResearch.com of 800 Australian residents, shows that that 33% are using social media to post pictures of their stay, 25% aren't finding what they are looking for on destination websites and that 45% are looking for commercial accommodation for their trip and not staying with friends or relatives.

Peak Load Scenario

8,500 visitors (with 7% of overnight visitors staying in commercial accommodation, 6% visitors using public transportation and 87% of visitors self-drive)

- **140 rooms** required per night
- **290 public transit seats** required per day
- **1,320 car spaces** required per day (car occupancy rate of 3.5 persons)

ENABLER: VFR CAMPAIGN

While often underestimated, the VFR sector is a key element of many visitor economies. TRA data indicates a total value from the sector in excess of \$15 billion. Research indicates that the sector has significant untapped potential, with 25% of people planning and going on trips to visit friends or relatives not finding the information they would like as quickly and as easily as possible (Source: MyTravelResearch.com, 2013). In addition, it is estimated that 45% of visitors also seek commercial accommodation during a trip.

Successful harnessing of VFR custom and stimulation of local economies can be driven by:

- Marketing directly to VFRs with tailored messaging and content;
- Engaging local communities to champion local attractions;
- Capitalising on social media usage by the VFR sector – research indicates that 43% of VFRs who use social media post images of activities at the destination on social media;
- Developing visitor information centre, regional and local tourism website services, campaigns and programs to specifically target the VFR sector - providing hosts and visitors with the information in the form they want it in;
- Business-led incentives such as attraction tickets being able to be used all year around by local residents, and hotel incentive programs specifically targeting VFR visitors; and
- Building community perceptions about their area in order to promote attractions, events and sights of the region.

If each resident brought in one additional VFR next year, Newcastle would see an additional 160,000 visitors to Newcastle.

VFR TOURISM OPPORTUNITIES

A key to the success of the VFR visitor economy is a dedicated campaign to encourage locals to stay at home and invite visitors to come and stay. Destinations have successfully implemented these campaigns (see Fraser Coast example), with lessons to share with Newcastle.

A ***Catalyst:** ensure every visitor leaves with a positive impression, some amazing photos and an understanding of the city. Develop a **smart phone App** that will consolidate and link Newcastle's web-based visitor information creating a smart city wayfinding platform.*

B ***Enabler:** A **strategic wayfinding program** informed by visitor need, including WiFi and digital hubs in spaces that showcase the city's assets and help to share the story with visitors so they can share it with the world through social media.*

C A volunteer **visitor ambassadors program** operating from **newly developed information hub at the Newcastle train station** where locals can share first-hand experiences with visitors.

D **Create new self-guided tours and trip planning tools** that allow 'experience seeking' visitors to get beneath the surface of the city

E Work with industry to develop **night-based experience packages**.

F Develop a **network of cycleways** linking Bathers Way with the Foreshore cycle network and the precincts in between, with a long-term vision of creating a bike-hire system for the city.

G Develop the next stage of **Bathers Way** with improved beach amenities including family and older age friendly facilities and ramps.

Case Study: Fraser Coast STAYcations

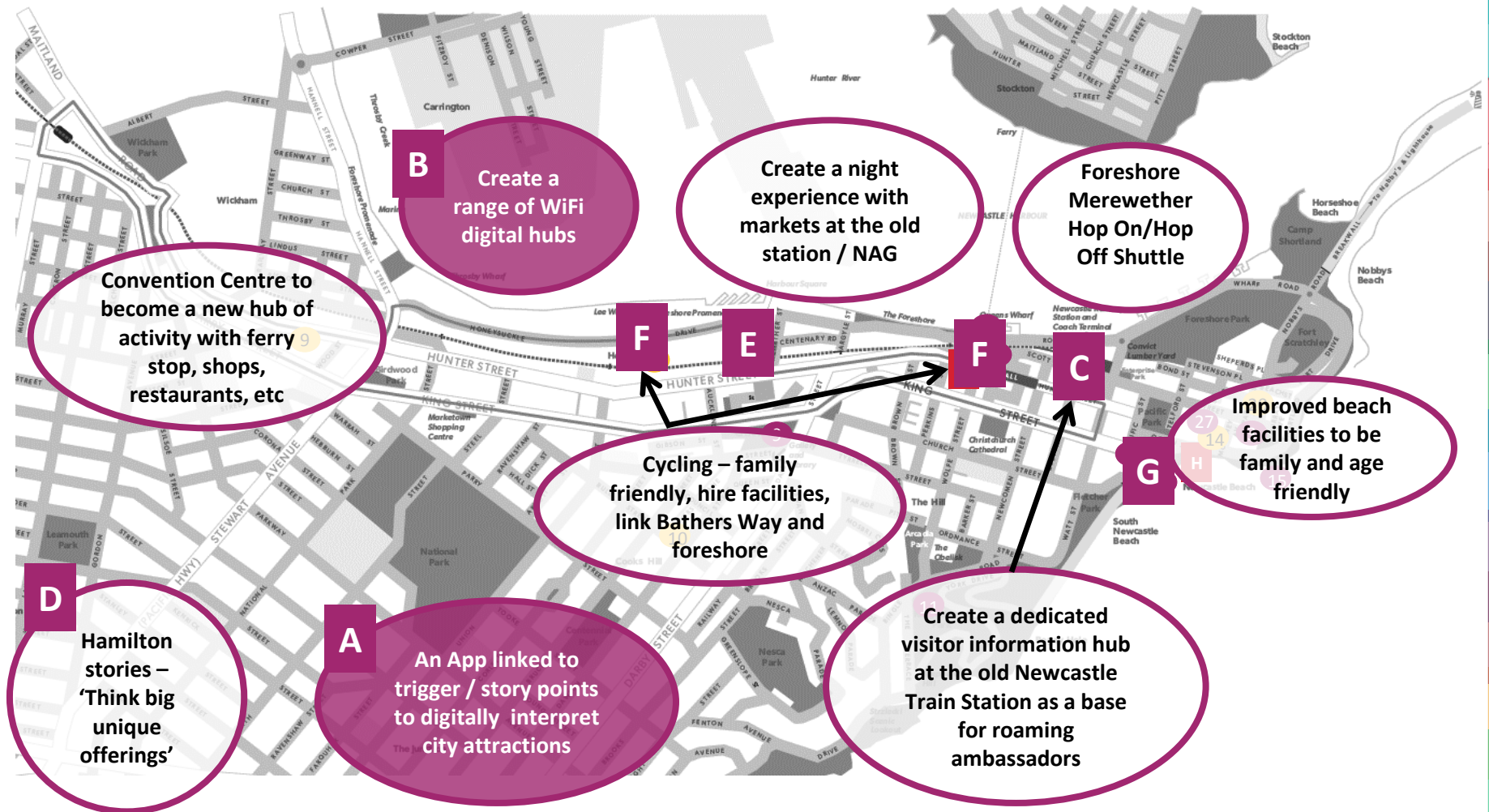
The Fraser Coast STAYcations campaign is a special incentive scheme introduced by the Fraser Coast Regional Council to stimulate the regional economy by encouraging residents and their visiting friends and relatives to holiday, dine and shop locally. In this campaign participating residents are rewarded for spending locally with discounts and deals from regional businesses and attractions via a loyalty card program.

Since its launch in April 2011, over 115 business partners have joined and benefitted from the scheme, providing almost 160 offers and incentives to more than 9,100 active local and tourist card holders. Furthermore the www.ourfrasercoast.com.au STAYcations website now attracts an increased average of almost 5,000 visitors each month, evidence of the regions increasing local and national exposure.

As Newcastle has a considerably larger population almost five times that of the Fraser Coast, the benefits of a similar VFR campaign could be exponentially advantageous for local businesses and the community.



VFR AND EDUCATION TOURISM VISION – WHAT DOES IT LOOK LIKE?





LEISURE LED GROWTH

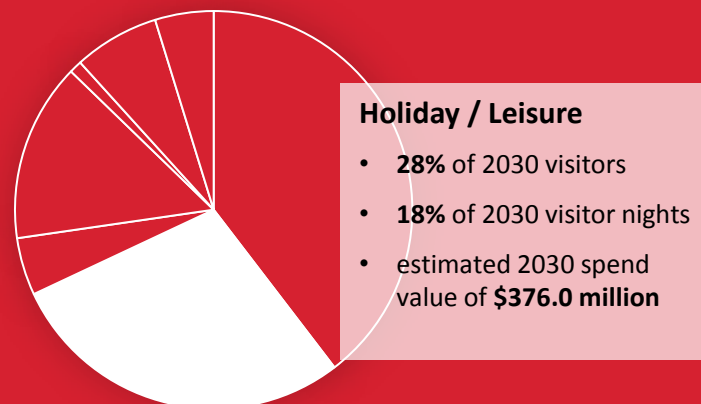
Overnight Short Breaks - The short break market has increased globally over the past few decades, with NSW alone contributing almost \$1 billion in expenditure to the regional NSW economy. Convenient access is a key factor in destination choice and is primarily made up of self-drive visitors.

Cruise - The Australian cruise shipping industry recorded an increase of 13.4% in the number of cruise ships visits in 2013-14, generating 1.95m passenger days in port and estimated expenditure of \$1.85B. Growth has spread across all states. An average cruise ship call is the equivalent of four A380 landings, with the advantage of cruise passenger shore visit spend being 60% higher than that of a non-cruise visitor. NSW, particularly Sydney, has benefited greatly from the cruise shipping industry – attracting 256 cruise visits in 2013/14 and continuing to grow as a major international cruise destination⁷.

Catalyst Project: Create signature experiences in each of the precincts that appeal to the growing leisure markets. Develop iconic lookouts to create features and linkages between precincts and experience nodes. Suggested locations include Nobby's Head, Christchurch Cathedral, Memorial Walk, and Tramway Reserve (Murray Avenue).

Growth will be led through:

- **Increased cruise vessel visits** to Newcastle through **targeted promotion with cruise lines**;
- **Aligning the destination with established touring routes or by packaging new tour routes** with other Hunter destinations;
- Developing **incentives and itineraries** based around specific activities and interests to **generate short break visits**; and
- Continuing to **develop appeal as a day visitor destination**.



An additional
583,300 visitors
by 2030



PEAK LOAD SCENARIO



10,200
visitors



350 extra rooms
per night



860 extra
seats per day



5,800 extra car
spaces at peak



Infrastructure



Integration



Attractions,
Experiences & Events

Potential growth – *an additional 583,300 visitors by 2030*

Approximately 41,500 international, 171,000 domestic overnight and 649,000 domestic day visitors to Newcastle came for leisure purposes in 2014 (YE Sept).

If the current visitor profile is retained, stretch forecasts suggest potential growth in leisure visitors by 2030 to 1.4 million (an additional 36,500 per annum), up from 861,500 in 2014.

It is anticipated that numbers would grow incrementally over the 15 year time horizon.

Estimating peak load

It is anticipated that leisure led growth (largely driven by overnight short-break and cruise visitors) would reach peak capacities during school holidays, with January being the current peak season for leisure visitors across both domestic and international markets. Highest pressure would be placed on the CBD during this time, particularly if a cruise ship was in port, with the following implications:

Peak Load Scenario

10,200 visitors (with 24% of overnight visitors staying in commercial accommodation, 4% visitors using public transportation and 90% of visitors self-drive)

- **350 rooms** required per night
- **860 public transit seats** required per day
- **5,800 car spaces** required per day

¹ Peak load estimated using 2030 stretch visitor estimates and seasonality data from Tourism Research Australia International and National Visitor Surveys (YE Sept 2014) plus average cruise ship passenger load (3,000).



Accommodation

Additional capacity and range of commercial accommodation will be required.



Public transport

There will be a **large importance of public and alternative transport options** for visitors. Planned light rail development provides an excellent opportunity to improve links between visitor precincts.



Infrastructure

Increased visitor numbers (day visitors and overnight) will result in **additional traffic movements and footfall**. Understanding visitor hubs and peak numbers of visitors will be key to effective and sustainable management.



Integration

Wayfinding, signing, and interpretation will be required to ensure easy orientation for visitors – Development of light rail provides an excellent opportunity to plan in interpretation into the network and build accessibility for visitors.



Attractions, Experiences, and Events

Need for an **improved range of experience options** for visitors. Considerations include;

- Possibility of establishing harbour tours
- Ensuring connectivity between key events/cruise and attraction /retail/service opening hours
- Improved quality of attraction experiences

LEISURE TOURISM OPPORTUNITIES

A

Catalyst: Create *signature experiences* in each of the precincts that appeal to the growing leisure markets. Develop **iconic lookouts** to create features and linkages between precincts and experience nodes. Suggested locations include Nobby's Head, Christchurch Cathedral, Memorial Walk, and Tramway Reserve (Murray Avenue).

B

Enabler: Development of the new dedicated Cruise terminal

C

Encourage ongoing **investment and management of culture and heritage assets** for increased exposure and accessibility including a **new business model** for the operation and management of the Heritage Precinct allowing year-round access including:

a. **Management model for 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.

b. Prepare a **Masterplan for Nobby's Lighthouse** including future tourism potential and interpretation needs.

D

Create a regular scheduled **Harbour Tour** with a view to supporting a year-round service with new ferry terminals at the Convention Centre, Queens Wharf and Stockton Beach.

E

Reinvigorate a number of important **community and visitor assets** including the Art Gallery and the expansion of the Museum once the heavy-rail line is removed.

F

Create a new centrally located **visitor information centre at the old Newcastle Train Station** co-located with a regional arts facility (e.g. artist incubator)

G

Development of **new public and privately funded attractions** (e.g. Aquarium, adventure park) to attract new and repeat leisure markets to the waterfront.

Case Study: Fremantle Port, WA

While largely focused on trade and cargo, Fremantle Port also has a thriving Cruise industry. Enjoying its biggest cruise seasons since the early 1970s, a number of ships are now homebasing in Fremantle.

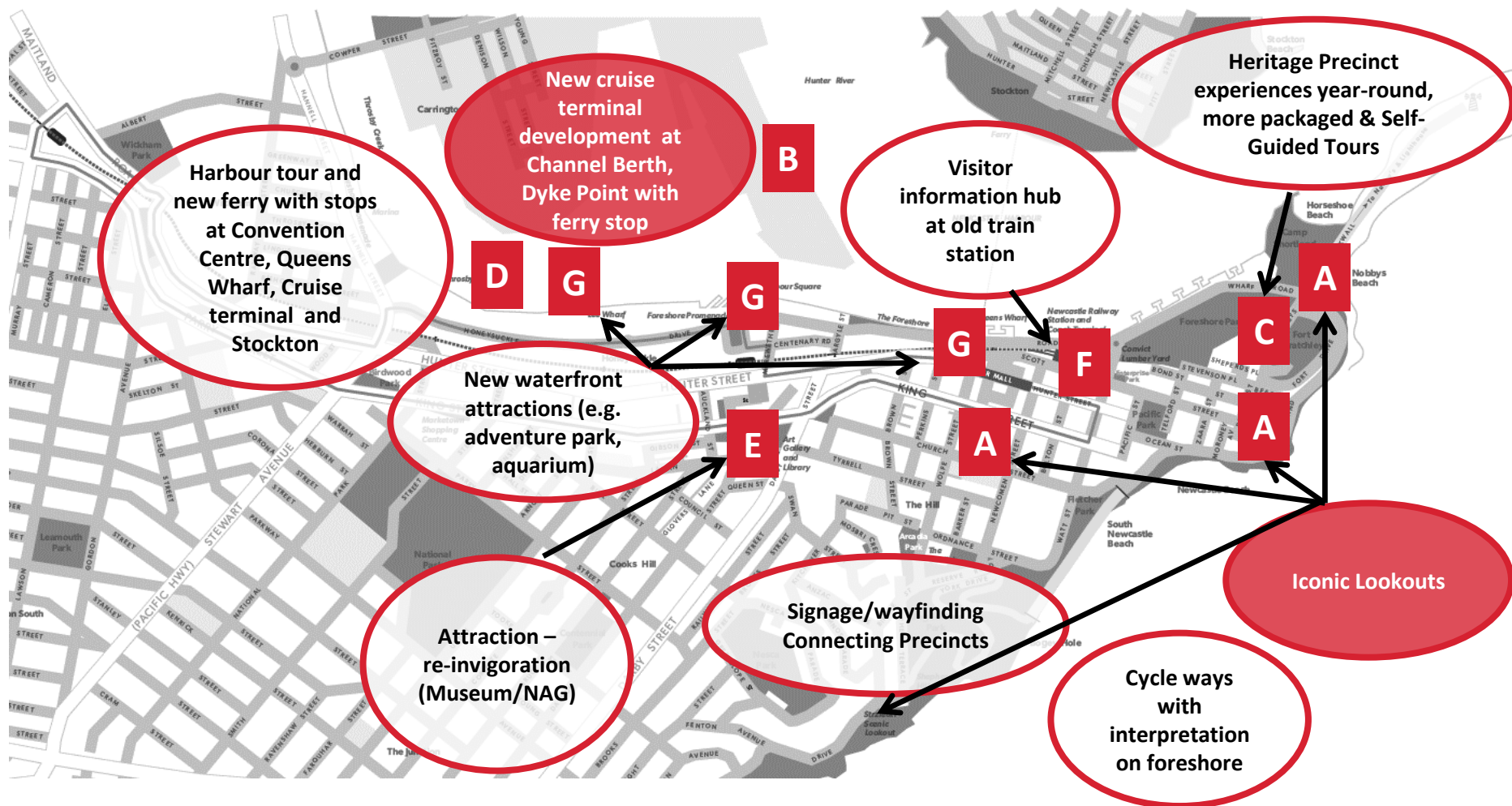
31 cruise ships generated 53,000 passenger days in port and \$63m in direct expenditure during 2013-2014. Berthing takes place at the Fremantle Passenger Terminal on Victoria Quay. The precinct around the western end of Victoria Quay hosts a number of visitor attractions including the WA Maritime Museum, the E Shed Markets and the B Shed Ferry Terminal, with operators servicing Rottnest Island and the Swan River.

Complimentary Wi-Fi access is provided to cruise ship passengers and the free *Experience WA* mobile App is recommended to visitors, providing information on places to see and explore in the metropolitan area and around the State.



Victoria Quay is well connected with public transport options. Public transport buses and trains run from all area of Perth to the Fremantle train station and bus terminal located within the precinct. Free CAT buses also run every ten minutes, seven days a week, connecting passengers with the most popular Fremantle destinations. The *Freewheeling Fremantle Initiative* provides free bike hire, with bikes available for use anywhere within Fremantle. Bikes can be collected from the E Shed Markets at Victoria Quay.

LEISURE TOURISM VISION – WHAT DOES IT LOOK LIKE?



PART B: THE PRECINCTS





NEWCASTLE CBD VISITOR ECONOMY PRECINCT PRIORITIES

Each of the six identified precincts has their own story to tell and therefore needs their own identity and priority actions. This section provides a summary of the key purpose and experience of each precinct. These are informed by their history, current uses and the future demand-driving assumptions outlined below.

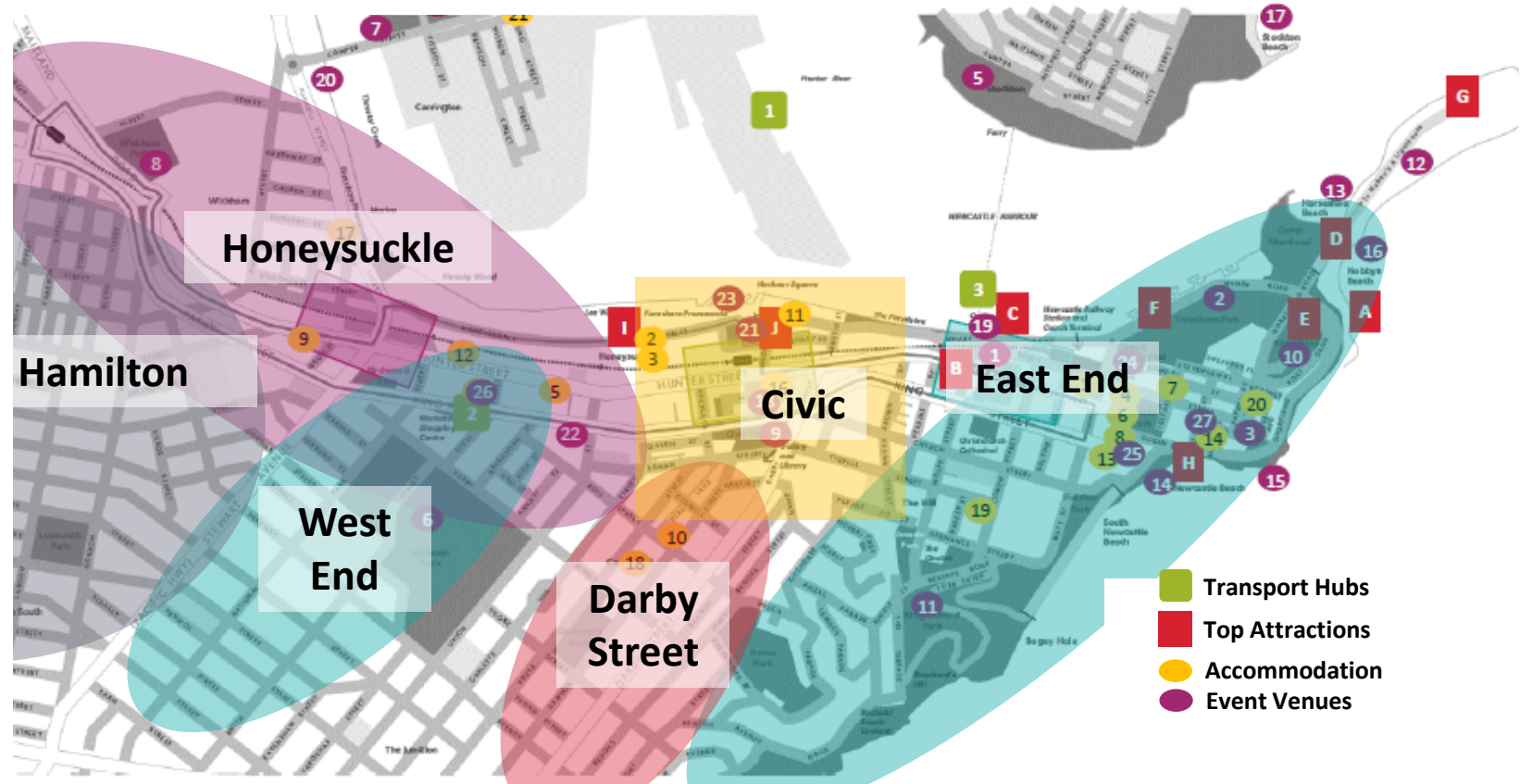
Demand-driving assumptions

- **Growing population** – by 2036, the City population is forecast to grow to 181,000 – a 15% growth from 2014 ⁴.
- **Continued economic growth** forecast for Newcastle and the wider region
- **Continued growth of the student population**, building on the ongoing development of the University campus.
- **Continued development of Newcastle Airport** as a national and international gateway. The \$80 million extension will increase domestic capacity as well as developing secure customs and immigration facilities to accommodate international flights.
- **The Port will continue to be a key economic driver**, following the Port of Newcastle Investments' new lease.
- **Implementation of the planned light rail route** – enhancing visitor amenity providing opportunities for improved connectivity between tourism precincts.

THE NEWCASTLE CBD VISITOR ECONOMY PRECINCTS

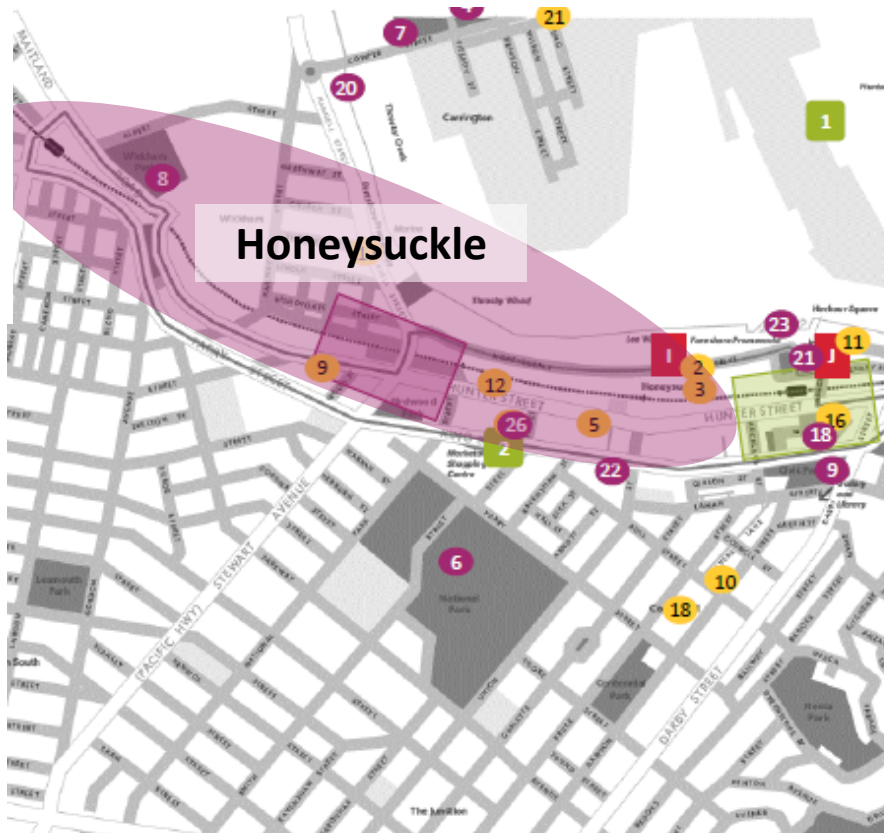
The Newcastle City Local Area Plan and Development Control Plan provide the overarching guidance to future development of the city – along with the Draft Economic Development Plan. From these documents a number of future influences on the identified precincts (see Map below).

In addition, the implementation of the urban renewal strategy for West End, Civic, Hunter St, Honeysuckle and East End will link the three main activity hubs and position the West End activity hub as the City's future CBD location. In addition to physical improvements, new planning controls will seek to stimulate growth by increasing the options for homes and jobs in the city centre- 10,000 jobs and 6,000 homes by 2036 (City of Newcastle).



HONEYSUCKLE PRECINCT

A thriving commercial and events precinct offering harbour views, easy transport options (ferry, train, light rail, bus and road), great restaurants and bars, a convention centre and hotels alongside commercial office space. The future development potential of the precinct is as the home of the new convention centre and cruise terminals, the start of the light rail and event sites suitable for live telecasts. Once these are in place the precinct could be home to new purpose-built attractions such as an aquarium or waterpark.



Catalyst Projects and Enablers for the Precinct

- A 2,000 pax new standalone **exhibition and conference facility** venue in the preferred location at Cottage Creek
- Attract investment into **business and leisure hotels**
- **Light Rail** with integrated **train and bus station**
- Development of the new dedicated **Cruise terminal at Channel Berth**
- An integrated **multi modal ticketing system** to connect the precincts of the Newcastle CBD.
- Event spaces with base infrastructure allowing 'plug-and-play' events especially **live telecast sites** for sporting events).
- **WiFi and digital hubs** in spaces that showcase the city's assets and help to share the story with visitors so they can share it with the world through social media.

Supporting Projects

- Connect city precincts with multi-modal transport including **new water-based transport** to the Convention Centre.
- Wayfinding and walking city with safe walking paths, lighting, clean spaces.
- Develop a **network of cycleways** with interpretation points, with a long-term vision of creating a city wide bike-hire system.
- Ferry stop and **harbour cruising**
- Once the convention centre is established encourage the development of **new attractions** on the waterfront
- Encourage the development of **multi-level carparks**.

CIVIC

The cultural heart of the City, where community gathers and reflects on their story. A bustling, lively, 24hr space for students, event goers and the community. A number of planned developments will begin to change the character of this precinct, including:

- **Development of the University's CBD education precinct (2017)**
- **Development of the law courts.**
- **Commercial development** including, retail (Marketown, Hunter Street), and accommodation proposals.
- Revitalising **Hunter Street Mall** to catalyse other renewal in the east end, including nearby major landholdings; and
- **Reshaping Hunter Street** as a key city destination to promote activity, business opportunities, events and other uses



Catalysts Projects and Enablers:

- Attract investment into **business and leisure hotels**
- Develop a **smart phone App** that will link Newcastle's web-based visitor information creating a smart city **wayfinding platform**
- CBD **event spaces** with base infrastructure allowing 'plug-and-play' events including the Civic forecourt.
- **WiFi and digital hubs** in spaces that showcase the city's assets and help to share the story with visitors so they can share it with the world through social media.
- A volunteer **visitor ambassadors program** operating from **newly developed information hub at the Newcastle train station** where locals can share first-hand experiences with visitors.
- Develop an **iconic lookout** at Christchurch Cathedral.

Supporting Projects:

- Reinvigorate a number of important **community and visitor assets** including the Art Gallery and the expansion of the Museum once the heavy-rail line is removed.
- Connect city precincts with multi-modal transport including **new water-based transport**.
- Create an integrated **multi modal ticketing system** to connect the precincts of the Newcastle CBD.
- **Create new self-guided tours and trip planning tools** that allow 'experience seeking' visitors to get beneath the surface of the city
- Work with industry to develop **night-based experience packages** by leveraging existing product such as the City Evolutions Project
- Develop a **network of cycleways** linking Bathers Way with the Foreshore cycle network and the precincts in between, with a long-term vision of creating a bike-hire system for the city.

EAST END

The iconic vistas of the East End celebrate the best that Newcastle has to offer. The harbour, the beaches, the historic monuments. This is 'the' visitor precinct with hotels, restaurants, bars, streetscapes, and water views. Future developments including hotel and residential development and the GPT East End project will ensure this precinct remains a focal point of the visitor and night-time economy of the CBD.



Catalysts and Enablers:

- Attract investment into **business and leisure hotels**.
- **Event spaces** with base infrastructure at Foreshore Park.
- Develop two **iconic lookouts** at Nobby's Head and Tramway Reserve.
- Create a new centrally located visitor information centre at the old **Newcastle Train Station** co-located with a regional arts facility (e.g. artist incubator)
- Connect city precincts with multi-modal transport including **new water-based transport** to the Convention Centre.
- Create an integrated **multi modal ticketing system** to connect the precincts of the Newcastle CBD.
- **Wayfinding signage** and digital systems are required to create a seamless experience of the city.
- **WiFi and digital hubs** in spaces that showcase the city's assets.

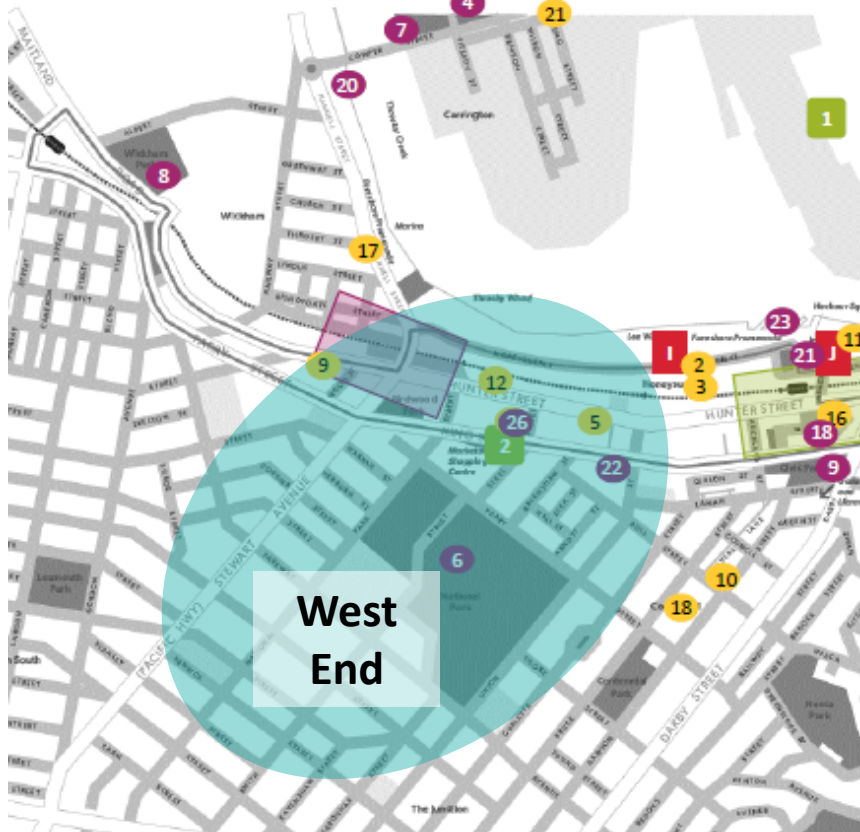
Supporting Projects

- Encourage ongoing **investment and management of culture and heritage assets** for increased exposure and accessibility including a **new business model** for the operation and management of the Heritage Precinct allowing year-round access including:
 - a. **Management model for 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.
 - b. Prepare a **Masterplan for Nobby's Lighthouse** including future tourism potential and interpretation needs.
- Work with industry to develop **night-based experience packages** by leveraging existing product such as the City Evolutions Project
- Develop a **network of cycleways** linking Bathers Way with the Foreshore cycle network and the precincts in between, with a long-term vision of creating a bike-hire system for the city.
- Develop the next stage of **Bathers Way** with improved beach amenities including family and older age friendly facilities and ramps.

WEST END

West End - the future commercial business district during the day and live music venues and bars at night. Implementation of the urban renewal strategy positions the West End activity hub as the City's future CBD location.

The future of the West End in the visitor economy will be servicing the newly developed convention centre, creating a new alternative night-time economy precinct with restaurants, bars, hotel development and event spaces.



Catalysts and Enablers:

- Attract investment into **business and leisure hotels**
- CBD event spaces with base infrastructure allowing 'plug-and-play' events.
- Seamlessly linking city assets and precincts with the planned light rail route and create an integrated **multi modal ticketing system** to connect the precincts of the Newcastle CBD.
- Reinvigorate a number of important **community and visitor assets** including art spaces once the heavy-rail line is removed.
- Once the convention centre is established encourage the development of new service facilities in the West End through **restaurants and bars**.
- **Wayfinding signage** and digital systems are required to create a seamless experience of the city.

Supporting Projects

- Encourage the development of **multi-level carparks** in the West End.
- **WiFi and digital hubs** in spaces that showcase the city's assets and help to share the story with visitors so they can share it with the world through social media.
- **Create new self-guided tours and trip planning tools** that allow 'experience seeking' visitors to get beneath the surface of the city
- Work with industry to develop **night-based experience packages** by leveraging existing product such as the convention centre and new CBD office buildings.

HAMILTON

Hamilton is well known for its community strength, commercial and cosmopolitan atmosphere, buzzing café scene and nightlife, Hamilton is primed to grow the CBDs night-time economy. Within each reach of the planned CBD (West End) and the preferred locations for a Convention Centre and located on the planned new light rail link.

Future development of residential and commercial buildings will support the development of new restaurants and bars, and the potential exists to create new 'plug-and-play' event spaces.



Catalysts and Enablers:

- CBD **event spaces** with base infrastructure allowing 'plug-and-play' events.
- Seamlessly linking city assets and precincts with the planned light rail and create an integrated **multi modal ticketing system** to connect the precincts of the Newcastle CBD.
- Reinvigorate a number of important **community and visitor assets** including art spaces once the heavy-rail line is removed.
- Once the convention centre is established encourage the development of new service facilities in Hamilton through **restaurants and bars**.
- **Wayfinding signage** and digital systems are required to create a seamless experience of the city.

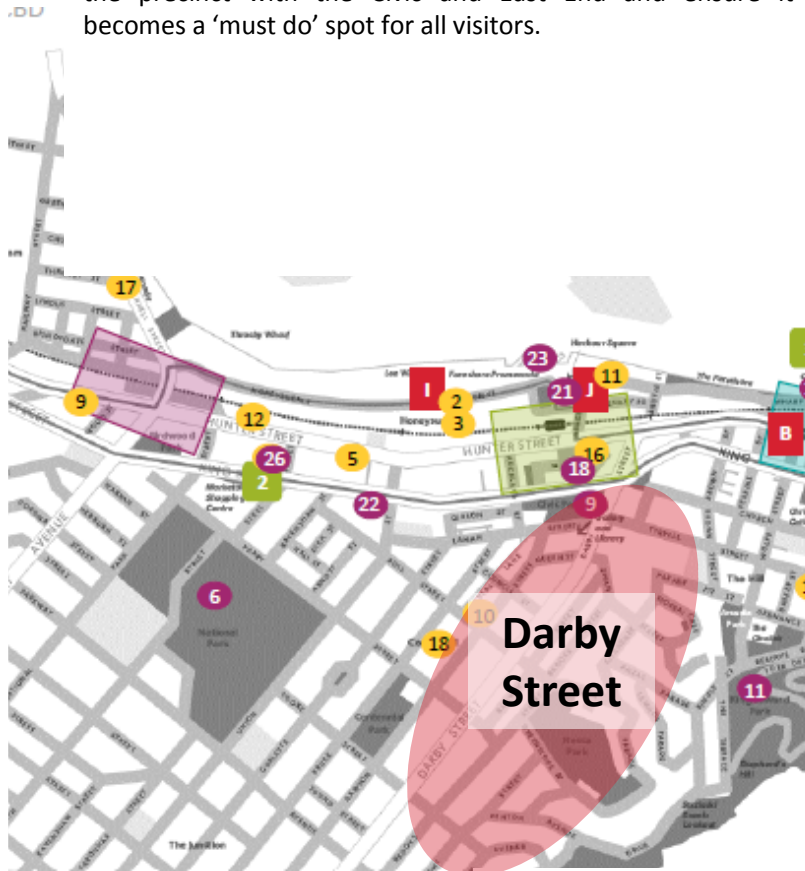
Supporting Projects

- Encourage the development of **multi-level carparks** in the Hamilton Precinct.
- **WiFi and digital hubs** in spaces that showcase the city's assets and help to share the story with visitors so they can share it with the world through social media.
- **Create new self-guided tours and trip planning tools** that allow 'experience seeking' visitors to get beneath the surface of the city
- Work with industry to develop **night-based experience packages** by leveraging existing product such as the convention centre and new CBD office buildings.

DARBY STREET

Boasting a village atmosphere, with owner operated businesses bursting with product knowledge and motivation to please, Darby Street is already known as the café and shopping strip.

Newcastle's high street where visitors can shop, people watch and be seen the opportunity for growth is to better connect the precinct with the Civic and East End and ensure it becomes a 'must do' spot for all visitors.



Catalysts and Enablers:

- Develop a **smart phone App** that will consolidate and link Newcastle's web-based visitor information creating a smart city wayfinding platform
- **Wayfinding signage** and digital systems are required to create a seamless experience of the city.
- Create an integrated **multi modal ticketing system** to connect the precincts of the Newcastle CBD.
- **WiFi and digital hubs** in spaces that showcase the city's assets and help to share the story with visitors so they can share it with the world through social media.

Supporting Projects:

- **Additional accommodation**, restaurants and supporting services are needed to service events. These will grow as events grow but also need to be a focus of the investment attraction and economic development of the city led by Council.
- **Reinvigorate the existing attractions**, particularly those managed publicly, to be world-class attractions suited to the conference market.
- Ensure a strong connection with the proposal for a **newly developed information hub at the Newcastle train station** where locals can share first-hand experiences with visitors.
- **Create new self-guided tours and trip planning tools** that allow 'experience seeking' visitors to get beneath the surface of the city
- Work with industry to develop **night-based experience packages** by leveraging existing product such as the City Evolutions Project to bring the precinct to life at night.
- Link the development of the next stage of **Bathers Way** with improved beach amenities including family and older age friendly facilities and ramps back to Darby Street.

RISKS & ENABLERS FOR GROWTH

Based on the scenarios identified for each growth opportunity, the following risks / barriers to growth need to be considered:

1. Event-Led

- A joined-up approach is required to deliver high quality events and maximise economic impact. Managing peak loads of visitors/ potential conflicts with neighbouring land uses
- Potential conflict with neighbouring land uses if not well managed
- Competition between cities for signature events is strong – the event pitch as well as demand drivers must be strong
- Resources - delivery of events can be resource intensive

2. VFR-Led

- Maximising sector value is reliant on raising awareness among residents/ residents becoming ambassadors for the visitor economy and creating a strong range of experiences which generate expenditure

3. Business / Business Events Led

- Competitive market/ proximity to Sydney (a positive in terms of a large market, negative in terms of competition)
- High entry costs - a new convention venue

4. Education Led

- Relative expense of Australia as a destination for international students

5. Leisure Led

- Strong competition from other domestic destinations
- The city needs to continue to create compelling reasons to visit – new and improved experiences
- Connectivity and making it easy for visitors to navigate is key

Leadership and communication

A strong alliance of public agencies with clear 'ownership' of CBD management is required to deliver growth. Collective ownership of strategic tourism objectives will enable delivery of a co-ordinated set of high quality visitor experiences. Clear co-ordination among public sector agencies and destination managers will pave the way for productive partnerships with businesses and communities.

Co-operative marketing investment to drive demand

A significant element of the investment required to meet stretch growth targets is based on stimulating demand and being marketing-driven. Commitment to significantly increased levels of co-operative marketing by partners across the region, such as businesses and councils, is important if the opportunity to maximise industry potential is to be delivered.

Access to capital

For the sector to deliver on its growth potential and generate the required level of investment required, access to capital is an important consideration. Accessing capital, whether it is venture capital, private equity or institutional funds, can be challenging.

Integrated planning

Ensure that local planning schemes and State regulations continue to enable and support new products and experiences.

Leveraging the existing brand

Leverage *Newcastle* – See *Change* branding, and events such as the 2015 AFC Asian Cup to challenge and change out-dated perceptions of the City.

Community support

Build community appreciation and support for tourism and future investment.

APPENDIX



APPENDIX 1 – CURRENT INFRASTRUCTURE

The following key is provided to accompany the map on page 28⁸.

Transport Hubs

1. Cruise Port
2. Wickham Interchange
3. Queen's Wharf

Top Attractions

- A. Nobbys Beach
- B. Hunter Street Mall
- C. Queens Wharf
- D. Harbour Breakwall
- E. Fort Scratchley
- F. Foreshore Park / Esplanade
- G. Nobbys Lighthouse
- H. Newcastle Beach
- I. Honeysuckle Precinct
- J. Newcastle Museum

Accommodation

1. Chifley Executive Suites (34 units)
2. Chifley Apartments Newcastle (70 units)
3. Honeysuckle Executive Apartments
4. Newcastle Serviced Apartments (20 units)
5. Quest Serviced Apartments (66 units)
6. Backpackers by the Beach
7. Terraces for Tourists (11 units)
8. Newcastle Beach YHA
9. The Cambridge Hotel Backpackers (17 rooms)
10. Cooks Hill Cottage (1 unit)
11. Crowne Plaza Newcastle (175 rooms)
12. Hotel Ibis (98 rooms)
13. Novotel Newcastle Beach (88 rooms)
14. Quality Hotel NOAHS On the Beach (90 rooms)
15. Travelodge Newcastle (130 rooms)
16. The Clarendon Hotel (20 rooms)
17. The Albion Hotel (7 rooms)
18. Centennial Terrace Apartments (14 units)
19. Newcomen Bed & Breakfast (2 rooms)
20. Hotel Novocastrian (45 rooms)
21. Carrington Place (14 rooms)

Event Venues

1. Blackbutt Reserve (natural area)
2. The Foreshore (natural area)
3. Tramway Reserve (natural area)
4. Connolly Park (sportsground)
5. Griffith Park (sportsground)
6. National Park (sportsground)
7. Pat Jordon Oval (sportsground)
8. Wickham Park (sportsground)
9. Civic Park
10. Fort Scratchley
11. King Edwards Park
12. Nobby's Headland
13. Horseshoe Beach
14. Newcastle Beach
15. Newcastle Ocean Baths
16. Nobbys Beach
17. Stockton Beach
18. Civic Precinct (1,520 pax)
19. Harbourview Function Centre
20. Marina Views Function Centre
21. Newcastle Museum (160 pax)
22. Newcastle Panthers (1,500 pax)
23. The Maritime Centre (200 pax)
24. Customs House Hotel (200 pax)
25. Novotel Newcastle Beach\Travelodge Newcastle (160 pax)
26. Travelodge Newcastle (120 pax)
27. Quality Hotels NOAHS On the Beach (300 pax)

POPULATION GROWTH⁴

NEWCASTLE ↑ 15.4% by 2036

156,533 current residents
180,640 future residents

UPPER HUNTER

Hunter Valley Wine Country

NEWCASTLE EMPLOYMENT HUB²

24% of the Hunter Region's population

59% of the Region's Info Media & Telecoms Jobs

52% of Professional Services Jobs

48% of Healthcare jobs

47% of Transport, Postal and Warehousing Jobs

DRIVE TOURISM

\$222M

5% of NSW interstate drive market

9% of NSW international drive market

97% of market are domestic visitors

By 2020

\$311M

127,551 additional visitors

HUNTER STADIUM¹²

33,000 capacity
Host of mega events such as the Asian Cup and other high profile sporting events

Barrington Tops

World Heritage listed rain forest

University of Newcastle & Hunter TAFE¹³

40,000 students and staff
(5% per year growth rate)

New CBD Campus will bring additional 2500 students

Education and Training by 2020
\$173.4M
2,103 FTEs

NEWCASTLE

RETAIL TRADE²

\$928.7M
(3.1% of all industry)
8,227 FTEs

Demands an additional 40,000 m² gross floor space by 2030

PORT OF NEWCASTLE¹¹

2,170 vessel visits

9 cruise ship visits

154.45 million mass tonnes of coal exported
1.08 million mass tonnes of general commodities exported

NEWCASTLE AIRPORT⁹

1.2M passengers in 2014
\$885.9M to economy
1,485 jobs

Airport expansion
↑ 5M annual passenger capacity

TOURISM¹⁰

NSW

\$27.9B gross value to state economy
(27% of Australia)

NEWCASTLE
\$655.7m visitor economy
3,726 visitor economy jobs

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)	<p>Internationally recognised world leader in research and key asset in attracting educational visitors.</p> <p>Local campus already attracting 17,500+ students.</p>	<p>Highly regarded facility with good international reputation.</p> <p>Expansion in city centre will assist in change of inner city profile.</p>	<p>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.</p>
Rail and Transport including Newcastle Airport	<p>CityRail and CountryLink connect to Sydney and regional NSW, intercity busses.</p> <p>Local transport network focussed on local needs only.</p> <p>Airport offers access to Sydney, Brisbane and Melbourne markets through major airlines. Further access to regional destinations through REX and Brindabella.</p>	<p>Intercity rail trip from Sydney is very attractive but lacking necessary rail infrastructure and speed to appeal to the wider visitor economy market.</p> <p>Airport provides direct link to international transfers via Sydney, Melbourne and Brisbane.</p> <p>Domestic transfers also available and well patronised for increasing business market.</p>	<p>Rail needs upgrades/ refurbishments to attract desired visitor economy based patrons.</p> <p>Bus and train interchanges identified as necessary.</p> <p>Airport facilities undergoing \$80 million transformation to cater for international market and domestic transfer opportunities.</p>