

---

## ATTACHMENTS DISTRIBUTED UNDER SEPARATE COVER

### CCL 24/11/2020 – PUBLIC EXHIBITION OF THE DRAFT 2021-2025 DESTINATION MANAGEMENT PLAN

**ITEM-87**      **Attachment A:**      Draft 2021-2025 Destination Management Plan

**DISTRIBUTED UNDER SEPARATE COVER**



Draft

# Newcastle Destination Management Plan

2021-2025



## Acknowledgment

City of Newcastle acknowledges that we operate on the grounds of the traditional country of the Awabakal and Worimi peoples.

We recognise and respect their cultural heritage, beliefs and continuing relationship with the land and waters, and that they are the proud survivors of more than two hundred years of dispossession.

City of Newcastle reiterates its commitment to address disadvantages and attain justice for Aboriginal and Torres Strait Islander peoples of this community.

City of Newcastle gratefully acknowledges the contribution made by stakeholders who took part in the consultation phase by attending workshops and meetings, including:

- Community members;
- Local businesses; and
- Regional and State Government Organisation

## Acronyms

<b>AAGR</b>	Average Annual Growth Rate	<b>LGA</b>	Local Government Area
<b>ABS</b>	Australian Bureau of Statistics	<b>LQ</b>	Location Quotient
<b>AHA</b>	Australian Hotels Association	<b>MICE</b>	Meetings, Incentives, Conferences & Events
<b>BIA</b>	Business Improvement Association	<b>MTB</b>	Mountain Bike
<b>CN</b>	City of Newcastle	<b>NBN</b>	National Broadband Network
<b>DMP</b>	Destination Management Plan	<b>NBT</b>	Nature-Based Tourism
<b>DNSW</b>	Destination NSW	<b>NTIG</b>	Newcastle Tourism Industry Group
<b>DPIE</b>	NSW Government - Department of Planning, Industry and Environment	<b>NVS</b>	National Visitor Survey
<b>DSSN</b>	Destination Sydney Surrounds North	<b>PON</b>	Port of Newcastle
<b>EDS</b>	Economic Development Strategy	<b>TAA</b>	Tourism Accommodation Association
<b>FTE</b>	Full Time Equivalent	<b>TRA</b>	Tourism Research Australia
<b>HCCDC</b>	Hunter & Central Coast Development Corporation	<b>UCL</b>	Urban Centre Locality
<b>HDC</b>	Hunter Development Corporation	<b>UON</b>	University of Newcastle
<b>HJO</b>	Hunter Joint Organisation (of Councils)	<b>USP</b>	Unique Selling Proposition
<b>IVS</b>	International Visitor Survey	<b>VFR</b>	Visiting Friends and Relatives
		<b>VIC</b>	Visitor Information Centre



## Contents

<b>Executive Summary</b>	<b>1</b>
<b>Destination Management Plan</b>	<b>10</b>
Introduction	12
Strategic Considerations	14
Strategic Framework	20
Themes and Actions	22
<b>Part B: Destination Management Plan Framework</b>	<b>58</b>
Strategic Context	61
Visitor Economy Profile	68
Products and Experiences Profile	76
Markets and Positioning	86

This document was largely prepared prior to the impacts of the COVID-19 pandemic. The short-term actions identified will assist with the recovery phase following the pandemic. This document should be used as a long-term planning tool to reinstate and grow the visitor economy beyond 2020.

# Visitor Economy Industry Leaders and Organisations

Participating in the development of this Destination Management Plan were leaders and major stakeholders from across government and industry. This allowed for guidance, information sharing and debate about the opportunities and the challenges facing the Newcastle visitor economy, as well as agreement on a shared vision and desired outcomes.

## Leading Destination Development Together

City of Newcastle brought together industry leaders from across the public and private sector to participate in the process and to gather expert input into the development of Newcastle's Destination Management Plan 2021-2025.

As representatives of, and advocates for Newcastle's visitor economy, we recognise the importance of purposeful development of the tourism, events and supporting industries at this time. This is a unique opportunity to influence the role the visitor economy plays for Newcastle in future years.

We believe that Newcastle can take its place as a modern global city while celebrating its heritage. Newcastle's success will be felt beyond our border playing a key role in encouraging dispersal and spreading the economic benefits to our greater Hunter Region, NSW and Australia.

We are proud to present the 2021-2025 Destination Management Plan and look forward to supporting the City of Newcastle to make the Plan's shared vision a reality.



**Christian Surname**  
Position title  
Destination NSW



**Christian Surname**  
Position title  
Destination Sydney  
Surrounds North



**Christian Surname**  
Position title  
Hunter and Central Coast  
Development Corporation



**Christian Surname**  
Position title  
Newcastle Airport Pty Ltd



**Christian Surname**  
Position title  
Port of Newcastle



**Christian Surname**  
Position title  
Guraki Committee



**Christian Surname**  
Position title  
The University of Newcastle



**Christian Surname**  
Position title  
Australian Hotel Association



**Christian Surname**  
Position title  
Tourism Accommodation  
Australia



**Christian Surname**  
Position title  
Hunter Business Chamber



**Christian Surname**  
Position title  
Newcastle Tourism  
Industry Group



**Christian Surname**  
Position title  
NSW National Parks  
and Wildlife Service

# Message from our Lord Mayor



The tourism sector plays a vital role in Newcastle's economy, having experienced significant growth during the past 10 years. In 2019 the visitor economy contributed \$945m in economic output and supported 4,920 jobs.

The City of Newcastle is committed to supporting the growth and sustainability of the visitor economy and in the last twelve months alone has invested in the delivery of a new and award winning tourism website, a new and contemporary Visitor Information Centre that enhances the visitor experience and showcases the Newcastle of today, a Product Development Mentoring Program to increase the suite of bookable experiences on offer and an Event Sponsorship Program that adds to the vibrant fabric of our community and city.

As a community and a visitor destination we are refreshing and stimulating because we choose to do things differently, we celebrate our urban-industrial and constantly evolving city, we embrace creativity and we are an intrinsically inclusive and genuine community. These values, when coupled with our geographical landscape and diverse experience pillars, provide us with a robust destination proposition for visitors to experience the true colours of Newcastle.

The 2021-2025 Destination Management Plan has been developed with collaboration at its core and it is through ongoing collaboration that we will ensure Newcastle's social and economic recovery in a post COVID-19 environment.

This Destination Management Plan provides us with a blueprint to work together across government and industry to create meaningful partnerships to achieve our vision of Newcastle as a premier visitor destination, showcasing a rich art, cultural and culinary scene, a vibrant night-time economy and experiences that celebrate our natural environment and creative community.

**Nuatali Nelmes**  
**Lord Mayor of Newcastle**









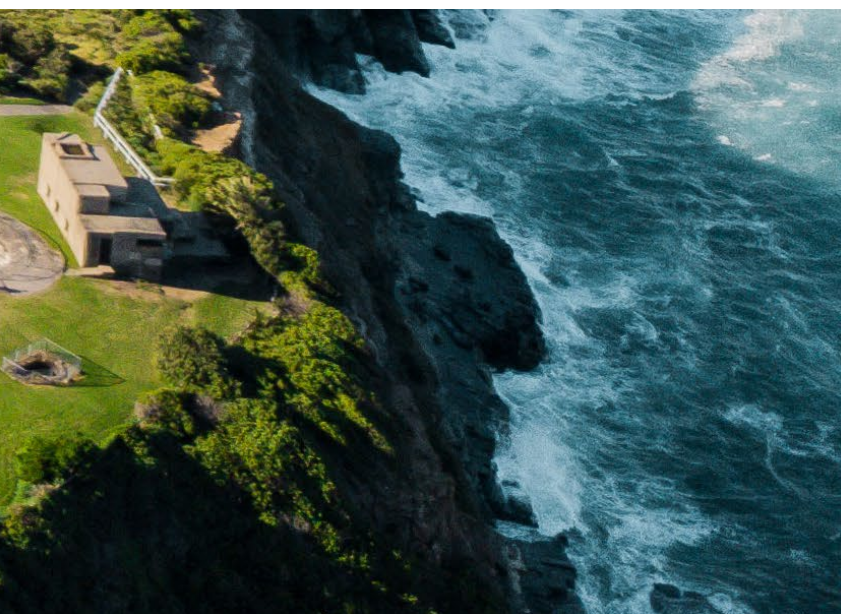


# Executive Summary

## Introduction

City of Newcastle has undertaken development of the Newcastle Destination Management Plan 2021-2025 to help ensure the growth and viability of the Newcastle visitor economy, enabling it to become resilient to external influences and changes in a dynamic and competitive market.

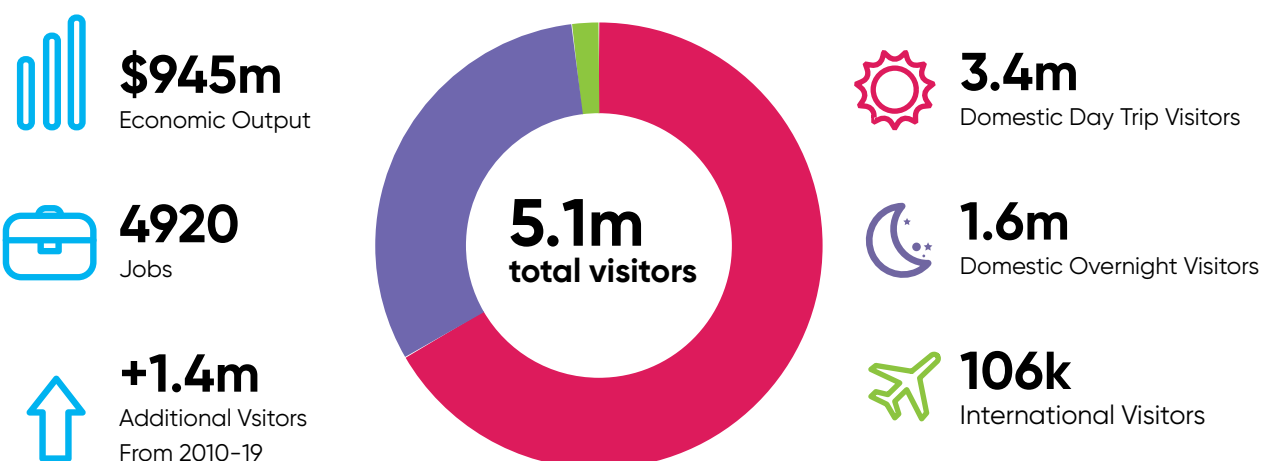
The Newcastle Destination Management Plan has been prepared in consultation with state and regional bodies, the local tourism industry and relevant stakeholder groups, and includes a breadth of research and analysis to develop a guiding strategic framework for future development of the city's visitor economy.



## Visitor Economy Profile

Newcastle has experienced significant growth in visitation during the past 10 years, attracting more than five million visitors a year. The visitor economy in Newcastle is estimated at almost \$1 billion in total output (direct and indirect expenditure) and provides jobs for 4,920 people within the city.

## Visitor Economy Highlights 2019



Figures represented are pre COVID-19 impacts.



## Strategic Context

Newcastle has undergone rapid change during the past 15 years, with major renewal projects leading to investment in key precincts. These projects, including Honeysuckle Urban Renewal Project, Revitalise Newcastle and the Coastal Revitalisation Project, have led to the establishment of new tourism precincts and facilitated investment in product, infrastructure and accommodation to support the sector.

Newcastle is strategically positioned to capture growth in the visitor economy, being positioned as the hub of the Hunter Region, with a major port to support the cruise ship sector. It has an expanding airport that allows easy access from many destinations across Australia and New Zealand. Securing the capacity of these major gateways to service future growth will be integral to ensuring Newcastle is able to realise the full potential of its burgeoning visitor economy.

## Visitor Profile and Product

Currently regional NSW and Sydney are the key visitor markets for Newcastle, predominantly within the 'drive' market. Many visitors are travelling to Newcastle for reasons other than holiday leisure including 'visiting friends and relatives', 'business events', 'business travel', 'attending events' and also for 'health, shopping and other services'. This reflects Newcastle's position as a hub for the region, with major hospitals, shopping centres, and a growing university presence across the CBD.

**Although Newcastle may not have a major hero attraction, its competitive advantage is the unique experiences created across the experience pillars of Coastal & Aquatic, Active & Outdoors, Arts, Heritage & Culture, Culinary and After Dark, within an accessible and compact city centre on a working harbour and with magnificent beaches.**

**This multi-faceted experience sets it apart from other beach destinations in Australia and makes it an attractive destination to domestic markets such as Melbourne and South East Queensland, as well as identified international markets as capability at Newcastle Airports expands. There is potential in driving growth in Asian markets through Newcastle Airport over time. Awareness of Newcastle as a destination, however, is low and work is needed to increase the profile of Newcastle in these potential target market locations.**

**Upon removal of COVID-19 domestic travel restrictions, focus markets will be intrastate followed by Melbourne and South East Queensland.**

A range of product development opportunities across identified experience pillars, in addition to asset upgrades and potential development, have been identified that will support the attraction of these markets.

Effectively engaging and supporting the growing number of tourism operators across the industry will ensure the region is 'visitor ready', with new and bespoke experiences and packaged itineraries that capture visitor spend and increase length of stay in the region.

Strategic investment in the visitor economy will strengthen and diversify the local economy, motivating population growth, and delivering connectivity and liveability improvements for the local community.

Detailed information and statistics on Newcastle's Visitor Economy Profile and Products is available in the Appendix.





## Strategic Considerations

To improve the overall consumer experience, the Destination Management Plan responds to the following key strategic considerations identified through research and consultation.

### Collaboration and Regional Positioning

The role of Newcastle as a hub to support and access the broader Hunter Region;

The need for stronger local and regional industry collaboration and partnerships;

The need for clarity around roles and responsibilities, as well as opportunities for partnerships in the visitor economy sector;

Improvement of industry knowledge, tourism education and connectedness between operators;

Low market awareness of Newcastle's offer in potential key markets and perception of the city as an industrial base rather than a holiday location;

The need to develop a clear and cohesive identity for Newcastle;

Low understanding of the value of tourism amongst existing and potential operators, resulting in a lack of product; and

Potential for packaging and promotion of existing assets.

### Infrastructure and Enabling

Improvement of existing assets that will support private sector investment and visitation growth;

Investment in key arrival visitor infrastructure to improve connectivity and accessibility;

Investment in accommodation to service known gaps and support key target markets; and

Enhancement of existing accommodation.

### Product and Experience Development

Development of new bookable experiences that are bespoke to Newcastle;

Undiscovered stories to be built on;

Interpretation and activation of existing heritage and cultural assets;

Signature assets require enhancement; and

Development of the night-time economy.







## Strategic Framework

### Vision

Newcastle is a premier Australian visitor destination, showcasing a rich art, cultural and food scene, a vibrant night-time economy, and accessible nature-based and coastal experiences.

### Objectives

Create a unified industry;

---

Leverage the diversity of strengths within Newcastle and surrounds;

---

Develop Newcastle as a hub for the broader Hunter Region;

---

Grow Newcastle's role and reputation as a holiday leisure destination;

---

Improve connectivity and access into and around the city;

---

Clarify roles and responsibilities, to ensure tourism activity is adequately resourced and supported by stakeholders;

---

Connect and promote experiences across Newcastle and the wider region;

---

Create a sense of place and identity in the public realm for visitors and the local community through placemaking; and

---

Continue to develop Newcastle as a leisure and business events destination through strategic partnerships.

---

## Destination Management Plan Themes and Initiatives

### Identity, Awareness and Placemaking

Creating a cohesive brand identity for Newcastle that can drive placemaking initiatives and promote positive awareness of Newcastle as an inclusive and accessible destination, establishing it as the hub of the Hunter Region.

#### Priority Initiatives

Destination Positioning Development

---

Marketing Plan Development

---

Precinct Placemaking, Wayfinding and Gateways Improvement Plan

---

Hunter Street Mall Enhancement and Placemaking

---

### Connectivity and Capacity

Ensure Newcastle's infrastructure and assets can effectively service and support the city's growing visitor economy, providing an accessible and connected network with the capacity to realise potential as a visitor hub and gateway to the Hunter Region.

#### Priority Initiatives

Cruise Industry Plan

---

Newcastle Airport Expansion

---

### Nature, Coastal and Wellness

Leverage the unique coastal position and surrounding natural assets to create compelling nature-based and wellness experiences through targeted product development and supporting infrastructure, facilities and services.

#### Priority Initiatives

Newcastle and Merewether Ocean Baths and Precinct Redevelopment

---

Bathers Way and Coastal Revitalisation Projects

---

Blackbutt Reserve Plan of Management and Masterplan

---

Harbour Foreshore Masterplan

---

Glenrock Conservation Area Amenity Improvements

---

### Creativity, Culture and Heritage

Create spaces and experiences that allow Newcastle's creativity, culture and heritage to develop and flourish, whilst ensuring the preservation, protection and improvement of city assets. Showcase diverse historical narratives and tell the stories of the city's makers and creators.

#### Priority Initiatives

Fort Scratchley Business Plan

---

Newcastle Art Gallery Redevelopment

---

Flagship Cultural Event

---

Nobbys Lighthouse Redevelopment

---

### Nightlife, Food, Wine and Ferments

Build on an already vibrant night-time economy, showcasing bespoke experiences and the city's emerging food and ferments scene. Encourage and facilitate growth of these aspects of the Newcastle offering.

#### Priority Initiatives

Extend Newcastle's Night-time Economy

---

### Events, Festivals and Conferencing

Raise awareness of Newcastle and showcase product strengths through attracting and developing signature events, as well as growing the business and conferencing events sector. Ensure the protection and improvement of existing assets while developing new infrastructure that defines Newcastle's unique proposition and support future growth.

#### Priority Initiatives

Events Strategy Update

---

Broadmeadow Sport and Entertainment Precinct

---

Waterfront Convention and Exhibition Facility

---

Consolidated Events Register

---

### Industry Collaboration and Product Development

Establish a unified and collaborative approach across Newcastle and the Hunter Region to connect experiences and create compelling itineraries. Industry and private sector need to invest in creating bookable and distributable tourism products and experiences. The City of Newcastle needs to facilitate industry development through engagement, education and training.

#### Priority Initiatives

COVID-19 Tourism Industry Recovery Plan

---

Collaboration across Hunter Region destinations

---

Newcastle and Hunter Region Product Packaging and Marketing

---

Tourism Capacity Building Project

---



# Destination Management Plan









# Introduction

## Overview

Urban Enterprise was commissioned by the City of Newcastle to assist with the development of the Newcastle Destination Management Plan 2021-2025. The Newcastle Destination Management Plan (DMP) has been prepared in close consultation with industry and other agencies. It aims to ensure the viability of the Newcastle visitor economy, enabling it to become resilient to external influences and changes in a dynamic and competitive market.

The key outcomes of the DMP include:

A situation analysis of the existing local tourism environment in Newcastle;

A concise set of strategic issues and opportunities;

Initiatives to direct sustainable growth of tourism; and

An action plan that provides specific, tangible actions to deliver the strategic directions.

## Roles in the Visitor Economy

The visitor economy is much broader than 'tourists' with products and services playing a key role in the development of regional local economies through the creation of jobs for locals, and enhancing services and assets for tourists and locals alike.

The City of Newcastle plays an integral role in the visitor economy through significant investment in:

Visitor Servicing;

Event sponsorship and attraction;

City of Newcastle owned and managed community and tourism facilities and assets.

The City of Newcastle also manages the 'Newcastle' brand and the Tourism team leads all Destination Marketing including:

Visit Newcastle website;

Visit Newcastle social media channels;

Visit Newcastle digital marketing including EDMs;

Destination marketing and brand awareness campaigns;

Brand management and development;

Collateral including banners and signage; and

Photography and video assets.

To ensure the sustainable growth of the visitor economy, City of Newcastle, State Government, tourism industry groups and the private sector need to adopt an integrated approach to tourism to support and deliver:

Infrastructure investment;

Asset development;

Facilities/attraction provision;

Placemaking development and management;

Investment and resident attraction;

Services to businesses and community;

Multiagency event support;

Industry development, capability and capacity building; and

Positive visitor experiences.

## Best Practice Destination Management

Destination management planning is based on the holistic consideration of a region's tourism industry, and the tourism industry's position in the regional economy. Destination Management Plans reflect the attributes of destinations, providing a blueprint for future investment in tourism including new experiences and attractions, and infrastructure requirements (roads, parks, technology) to support visitor growth.

## Destination Management Plan Process

### 1. Background Research and Visitor Data

Review of relevant policies and strategies;

Visitor data analysis utilising Tourism Research Australia data (National and International Visitor Survey);

Product and experience review based on desktop analysis and information provided during consultation;

Economic and Community profile; and

Visitor Servicing Assessment.

### 2. Consultation and Information Gathering

Localised consultation in conjunction with City of Newcastle including:

Workshops with government and industry (four in total); and

Individual and small group discussions in region and by phone (15 in total).

A total of 73 participants from 37 separate industry organisations and operators were represented across these activities.

### 3. Newcastle Destination Management Plan Background Report

Development of the Newcastle Destination Management Plan Draft Background Report including:

Overview of background research and analysis conducted;

Issues and opportunities analysis identifying key strategic considerations; and

Strategic framework providing overarching objectives; assessment criteria; priority projects and project opportunities.

### 4. Newcastle Destination Management Plan Report

Preparation of a Draft Destination Management Plan for public exhibition and comment; and

Preparation of a Final Destination Management Plan.

*Refer to Appendix A for Background Research and Analysis*

# Strategic Considerations

## Collaboration and Regional Positioning

### LGA Industry Fragmentation

Newcastle is yet to benefit from a whole-of-industry approach and strong partnerships between industry, State Government and City of Newcastle. This has prevented an integrated approach to achieving mutual goals. There are however signs of progress in this area and in particular growing collaboration between City of Newcastle and Newcastle Tourism Industry Group.

### Joint Investment Required

To ensure ongoing sustainability of Local Government-led tourism activity, a financial model that considers stakeholder contribution needs to be explored. This will ensure City of Newcastle and industry work more collaboratively and effectively towards identified strategic priorities for Newcastle's visitor economy. This model will need to be adequately resourced and supported by all stakeholders.

### Limited Industry Knowledge and Networking across the broader economy

Local awareness across industry and the community of what's on offer in Newcastle is limited. In addition, the tourism products and attractions that are available to support a short break/weekend holiday leisure stay for family groups and adult couples are not promoted and/or are not available for purchase via third party distribution channels. This presents opportunities for product development and packaging. An emphasis on industry education and development and community awareness will be integral to making improvements in knowledge, awareness, service levels, product development and distribution for Newcastle.

### Stronger Regional Industry Collaboration Required

Industry fragmentation extends to the regional context, where several different models apply to tourism governance across the Hunter. This means several different industry and government agencies have various levels of input and influence on the visitor economy in the Hunter Region, but there are limited mechanisms to foster communication and collaboration.

### Understanding of the Value of Tourism

There is low awareness and understanding of the value of tourism to the local economy. This value is beyond the direct economic benefits derived from visitor expenditure and includes the lifestyle benefits from enhancing tourism product and experiences. This needs to be communicated to the community and other stakeholders to ensure a whole-of-industry approach to visitor economy growth.

### Role of Newcastle as a Hub for the Hunter Region

Newcastle has a significant opportunity to act as a hub for visitors for the broader region. There is an extensive amount of product in surrounding areas including the destinations of Lake Macquarie, Port Stephens and the Hunter Valley. Newcastle has a large and growing accommodation base that can support leisure travel to the region, particularly on weekends when occupancy is low. Promoting product in surrounding areas can lead to an increase in length of stay in Newcastle and attraction of visitors who would have otherwise stayed elsewhere in the region.

### **Low Perception and Market Awareness of Newcastle's Offering**

When benchmarked with other regions and city destinations, Newcastle has had limited spend on marketing programs to support leisure travel. The low awareness of what Newcastle has to offer in potential key holiday markets of Sydney, Melbourne, Brisbane and Auckland has led to limited knowledge of Newcastle as a destination.

### **Development of a Clear and Cohesive Identity for Newcastle**

Newcastle's leisure tourism proposition is currently not communicated to visitors in a clear and cohesive manner that effectively identifies and promotes the city's competitive advantage. The lack of bookable product is one reason for low awareness and appeal. Development of a clear brand identity for Newcastle that is cohesive across pre and during trip marketing, visitor information and services is required to promote positive awareness of the city and establish it as a destination of choice. Marketing needs to be developed in phases to include building awareness; followed by tactical marketing.

### **Packaging and Promotion of Existing Assets**

Although there are a range of existing assets and activities available within Newcastle, effective promotion and packaging of these as linked 'experiences' or itineraries is limited. Industry education and development will be integral to making improvements in product development and distribution for Newcastle.

Effectively promoting and developing packaged experiences has the potential to achieve a range of positive outcomes including the conversion of day trip to overnight visitors, increasing the current length of stay for overnight visitors to the region, aiding dispersal across Newcastle and the wider Hunter Region, providing greater visitor motivation, and enhancing regional positioning.





## Infrastructure and Enabling

### Key Arrival Visitor Infrastructure Requires Better Connectivity and Access

Connectivity and access between key arrival points into Newcastle is currently fragmented and does not provide the best arrival experience for visitors, including both the airport and port.

Whilst there has been substantial investment in public transport within the Newcastle CBD (such as light rail), there remains a need to improve transport linkages and the regularity of services within Newcastle and beyond to surrounding areas.

### Enhancement of Existing Accommodation

Existing accommodation varies in quality and service offer, and requires enhancement both to improve the overall visitor experience, and to enable existing operators to better compete with recent and planned accommodation investment.

### Accommodation Investment

Newcastle has a number of planned accommodation investments within the higher quality, (five-star) end of the market such as Crystalbrook – Kingsley, QT, and Little National, which will be coming online in the near future. However, there are still a number of gaps across key accommodation typologies that are required in order to effectively service identified target markets including the adult couple leisure market and the family holiday market.

### Newcastle Airport Upgrade

There is an opportunity to invest in the widening and strength of Newcastle's runway and expansion of its terminal to support international flights. This would open Newcastle Airport to international markets in South East Asia for direct flights. The Australian Defence Force is already seeking to undertake runway expansion works that could be leveraged with further investment to deliver the full package of runway works required. Design plans and an investment business case are already prepared for the infrastructure works.

### Cruise Port Terminal

The development of a home port terminal with an enhanced visitor experience was identified as a key opportunity to grow the cruise market within Newcastle. In addition to this, a substantial State Government funding commitment was made to establish the terminal. There remains a lack of commitment by the Port of Newcastle to support the initiative due to the shortfall in funding required to deliver the terminal and lack of clarity around ongoing management of the cruise sector in Newcastle.

Further investigation is required into the best delivery approach for this infrastructure including location, level of investment needed and responsibility for ongoing servicing of the cruise sector.



## Product and Experience Development

### Undiscovered Stories to be Built On

Newcastle is one of the oldest cities in Australia and has significant pre and post European history, which could be enhanced. This includes areas of Aboriginal significance, European settlement, heritage and military heritage, as well as significant history and assets related to the city's important role as an industrial hub. Ongoing marketing enhancement of heritage assets will enable visitor access to Newcastle's heritage narratives.

### Lack of Bookable Product

There are only three activities and attractions that are bookable through online distribution partners. Further product development and industry education should focus on ways to activate and create bookable and commissionable experiences.

### Interpretation and Activation of Existing Heritage and Cultural Assets

There are a vast number of heritage buildings that have little or no heritage activation or interpretation. Heritage interpretation should be explored further to provide a layer of interest and activity for visitors and improve placemaking. Support for the professionalisation of management of key heritage sites would lead to long-term positive tourism outcomes while retaining volunteer knowledge and support.

Key sites that should be a focus for heritage asset enhancement include Fort Scratchley and The Res.



### Signature Assets Require Enhancement

In addition to key heritage assets, there are a number of other signature assets that require enhancement to fully realise their potential, both as visitor attractions, and as community assets. Key assets include:

Newcastle Ocean Baths;  
 Glenrock State Conservation Area;  
 Blackbutt Reserve;  
 Harbour Foreshore Precinct;  
 Newcastle Art Gallery;  
 Newcastle Convention and Exhibition Centre (NEX);  
 Supporting infrastructure for Broadmeadow Sports and Entertainment Precinct; and  
 Hunter Street Mall Enhancement.

### Entertainment Precincts

While the food and beverage experience in Newcastle is strong, it is fragmented across numerous precincts and locations. There is a need to examine locations for revitalisation and redevelopment to create a signature entertainment precinct that can be activated and leveraged to attract visitation. Salamanca area in Hobart presents an example of an effective entertainment precinct that draws visitors. Having numerous activity centres dilutes the opportunity for a large and vibrant entertainment precinct.

### Continuing the Night-Time Economy Recovery

The lockout conditions imposed on Newcastle's night-time venues since 2008 are considered by some to have had a severe impact on the night-time economy, and continue to reinforce a negative perception of the city. Newcastle should continue to focus on improving the city's twilight/night-time economy, particularly through advocating for more flexible conditions that support the development of new night-time offerings and activations that showcase Newcastle's strengths in arts and culture, and boutique food and beverage experiences.



# Strategic Framework

## Objectives

The following strategic framework provides the overarching approach and future directions for sustainable development of the visitor economy in Newcastle. This includes understanding the key strategic considerations that provide an overview of the identified issues and opportunities for Newcastle's visitor economy, and the vision and strategic development themes that provide a focus for future investment in the region.

### Vision

Newcastle is a premier Australian visitor destination, showcasing a rich art, cultural and foodie scene, a vibrant night-time economy, and accessible nature-based and coastal experiences.

Through investment in new tourism products, industry collaboration and targeted marketing, Newcastle's visitor economy will thrive and lead to population, economic and jobs growth.

### Objectives

Create a unified industry;

---

Leverage the diversity of strengths within Newcastle and surrounds;

---

Develop Newcastle as a hub for the broader Hunter Region;

---

Grow Newcastle's role and reputation as a leisure destination;

---

Improve connectivity and access into and around the city;

---

Ensure that tourism activity and initiatives are adequately resourced and supported by stakeholders;

---

Connect and promote experiences across Newcastle and the wider region;

---

Create a sense of place and identity in the public realm for visitors and community through placemaking; and

---

Develop Newcastle as a leisure and business events destination through strategic partnerships.

---



## Assessment Criteria

In response to the objectives identified, the following key criteria have been developed to inform the assessment of proposed projects and to identify priorities:

Criteria	Description
<b>Motivates Target Markets</b>	Creates new experiences that will motivate target markets
<b>Improves Market Perception and Awareness</b>	Promotes positive awareness of Newcastle and wider region
<b>Generates Visitor Dispersal and Extends Length of Stay</b>	Provides new or improved products and experiences that motivate overnight stays, provide packaging opportunities and/or assist in creating a critical mass of product to assist in converting daytrip visitors to overnight
<b>Increases Visitor Yield</b>	Provides opportunities to capture or increase visitor yield through product development and packaging
<b>Facilitates Collaboration</b>	Enables industry networking, and/or creates opportunities for regional collaboration (eg through developed itineraries, packaging, and promotion), as well as opportunities for joint-funded initiatives
<b>Improves Visitor Experience</b>	Improves visitor readiness and servicing, and/or connectivity and access into Newcastle and to existing experiences
<b>Improves amenity and activation</b>	Contributes to improved amenity and activation within Newcastle for both visitors and local community through placemaking



# Destination Management Themes

Based on research, analysis and consultation, the following seven themes have been identified to provide the framework for ensuring the viability and sustainable growth of the Newcastle visitor economy.



### Identity, Awareness and Placemaking

Creating a cohesive brand identity for Newcastle that can drive placemaking initiatives and promote positive awareness of Newcastle as an inclusive and accessible destination, establishing it as the hub of the Hunter Region.

### Connectivity and Capacity

Ensuring Newcastle's infrastructure and assets can effectively service and support the growing visitor economy, providing a connected network with the capacity to realise potential as a key visitor hub and gateway.

### Nature, Coastal and Wellness

Leveraging Newcastle's unique coastal position and surrounding natural assets to create compelling nature-based and wellness experiences through product development and supporting infrastructure, facilities and services.

### Creativity, Culture and Heritage

Creating spaces and experiences that allow Newcastle's creativity, culture and heritage to develop and flourish, whilst ensuring the preservation, protection and improvement of assets. Showcasing diverse historical narratives, and telling the stories of local makers and creators.

### Nightlife, Food, Wine and Ferments

Building on an already vibrant night-time economy for Newcastle, showcasing bespoke experiences and emerging food and ferments scene. Encourage and facilitate growth of these aspects of the Newcastle offering.

### Events, Festivals and Conferencing

Raising awareness of Newcastle and showcasing strengths through attracting and developing signature events, and growing the business and conferencing events sector. Ensure the protection and improvement of existing assets while developing new infrastructure to meet market needs and support future growth.

### Product Development and Industry Collaboration Establishing

Establishing a unified and collaborative approach across Newcastle and the Hunter Region to connect experiences and create compelling itineraries. Facilitate industry development and the creation of bookable and distributable tourism products and experiences through engagement, education and training.







## Theme 1:

# Identity, Awareness and Placemaking

**Creating a cohesive brand identity for Newcastle that can drive placemaking initiatives and promote positive awareness of Newcastle as an inclusive and accessible destination, establishing it as the hub of the Hunter Region.**

Newcastle is the largest urban centre within the Hunter Region and has the largest accommodation base, service industry, and employment base, located only 20 minutes from the airport.

Market perception and awareness of Newcastle as a destination is currently limited, however there is a diverse range of experiences to capitalise on to develop a unique selling proposition (USP) and cohesive brand identity.

The overarching comparative advantage of Newcastle is its compact nature, which straddles both a working harbour and some of the best beaches in Australia. This provides a destination with beach and ocean product as good as any other competing destination, with the service offering, arts and culture, dining, entertainment and accommodation of a large regional city or metro precinct. This is a unique proposition when compared to other destinations in Australia and should be the focus for promotion.

This Destination Management Plan will focus on realising the hub potential of Newcastle as the key visitor arrival point, retail and service centre for the wider Hunter Region.

There is significant potential for Newcastle to become the centre for overnight stays in the region drawing on its accommodation assets, diverse experience offer and proximity to the range of complementary attractions and experiences across the wider Hunter Region.

Improvement of in-region visitor servicing also represents a key opportunity to enhance the current visitor experience of Newcastle, and in turn increase awareness of the region through successive word-of-mouth advocacy. The recent relocation and enhancement of the Visitor Information Centre (VIC) is a positive step towards improving visitor servicing in Newcastle. Enhancement of precincts, wayfinding and signage will strengthen the visitor experience and create stronger definition to the way the region is explored.



## Priority Initiatives

### **Destination Positioning Development (Newcastle DNA Identity) and Marketing Plan**

Newcastle requires destination positioning development and a subsequent marketing plan that builds on the findings of the Destination Management Plan in terms of target markets, key product strengths and product and experience mix to drive visitation to the destination.

### **Hunter Street Mall Enhancement and Placemaking**

Hunter Street Mall is the historic retail and activity centre of Newcastle. The Mall provides a compact and interesting experience for visitors, with heritage buildings and sloping topography that creates a sense of ambiance that is not achieved in other precincts in Newcastle.

The Mall, however, is in need of refurbishment and enhancement to improve the public amenity. Further activation of the spaces in the Mall will improve its attractiveness.

There is long-term opportunity for the Mall to become a premier entertainment and dining precinct given its unique character and proximity to the foreshore and beaches and increasing accommodation and population density.

### **Precinct Placemaking, Wayfinding and Gateways Improvement Plan**

Wayfinding and gateways in Newcastle are underdeveloped and reflect poorly on the visitor experience in terms of navigating the city and reinforcing the Newcastle brand.

The development of a placemaking, wayfinding and gateway improvement plan will greatly improve the way Newcastle is experienced by visitors.

Arrival signage at gateway points as well as directional and promotional signage North and South on the M1/Pacific Hwy, and West on the New England Hwy (Hunter Expressway), will create awareness and increase desire to visit Newcastle for the millions of people travelling on these arterial roads.

## Identity, Awareness and Placemaking Initiatives

Initiatives	Timeframe	Stakeholders	Lead Organisation	Notations
<b>Establish Destination Positioning and Marketing Plan</b>	●○○	City of Newcastle Newcastle Tourism Industry Group	City of Newcastle	<ul style="list-style-type: none"> <li>Develop brand positioning</li> <li>Create new digital assets aligned to experience pillars</li> <li>Implement phased marketing campaigns to increase destination awareness and appeal.</li> </ul>
<b>Development of Targeted Marketing Campaign(s)</b>	●○○	City of Newcastle Newcastle Tourism Industry Group	City of Newcastle	<ul style="list-style-type: none"> <li>Following preparation of the Destination Positioning and Marketing Plan, develop and deliver marketing campaigns targeted to agreed market segments.</li> </ul>
<b>Visitor Information Servicing Plan</b>	●○○	City of Newcastle	City of Newcastle	<ul style="list-style-type: none"> <li>Prepare a brief for the preparation of a visitor information services plan to align with branding and marketing projects that includes consideration of pre and during trip information, physical visitor information centres, digital information and roving visitor information to meet market need.</li> </ul>
<b>Precinct Placemaking, Wayfinding and Gateways Improvement Plan</b>	○●○	City of Newcastle BIA	City of Newcastle	<ul style="list-style-type: none"> <li>Prepare a placemaking, wayfinding and gateway plan for Newcastle including design of signage, gateways and precinct activations.</li> <li>Work collaboratively with relevant Government agencies on plan development, funding and implementation eg Transport, Roads and Traffic.</li> </ul>
<b>Hunter Street Mall Enhancement and Placemaking</b>	○●○	City of Newcastle BIA Iris Capital	City of Newcastle	<ul style="list-style-type: none"> <li>Undertake placemaking and activation plan for Hunter Street Mall. This should consider: <ul style="list-style-type: none"> <li>Expanding the retail and entertainment mix;</li> <li>Ongoing activation of the Mall;</li> <li>Placemaking and branding;</li> <li>Reinvestment in heritage buildings; and</li> <li>Public space improvement.</li> </ul> </li> </ul>

● 1-2 Years   ● 3-4 Years   ● Beyond Current DMP



Initiatives	Timeframe	Stakeholders	Lead Organisation	Notations
<b>Access and Inclusion City Guide and Website Information</b>	○●○	City of Newcastle BIA Newcastle Tourism Industry Group	City of Newcastle	<ul style="list-style-type: none"> <li>Develop an Access and Inclusion City Guide and associated website information for Newcastle and surrounds.</li> </ul>
<b>VIC Opportunity Study</b>	○●○	City of Newcastle	City of Newcastle	<ul style="list-style-type: none"> <li>Investigate opportunities for further development of the VIC space, including the ability to create a visitor experience and/or realise brand propositions (eg Smart Cities).</li> </ul>
<b>Positioning Newcastle as the Hub of the Hunter Region</b>	○○●	City of Newcastle Newcastle Tourism Industry Group	City of Newcastle	<ul style="list-style-type: none"> <li>Review current visitor information provided by Newcastle to create links with regional product and experiences;</li> <li>Produce visitor information maps that show Newcastle as a hub for the broader region, and proximity to regional experiences; and</li> <li>Future branding and marketing should consider ways to create a link between Newcastle and the regional experiences and product.</li> </ul>

● 1-2 Years   ● 3-4 Years   ● Beyond Current DMP









## Theme 2:

# Connectivity and Capacity

**Ensuring Newcastle's infrastructure and assets can effectively service and support the growing visitor economy, providing a connected network with the capacity to realise the potential as a key visitor hub and gateway.**

Newcastle is a gateway to the Hunter Region and the strategic development of key infrastructure provides significant opportunity to better service current visitors, as well as assist in attracting key target markets.

Whilst Newcastle is well serviced with existing transport methods, the quality, scale and capacity of key existing major infrastructure such as the Airport and Port currently present major barriers to realising tourism growth. Despite significant connectivity improvements by replacing the CBD commuter rail line with the Newcastle Light Rail, there are still key service gaps in public transport provision, particularly those that are location-based (eg airport connections).



## Priority Initiatives

### Cruise Industry Plan

Due to Newcastle's high quality port infrastructure and proximity to strong regional experiences, such as Lake Macquarie, Port Stephens, the Hunter Valley and Maitland, with good transport connections by road, rail and air, Newcastle has become a cruise ship destination.

There is opportunity for the Port Authority of NSW to develop a Cruise Industry Plan for Newcastle that will determine the future direction and long-term development of the cruise industry within Newcastle, taking into consideration the Port Master Plan 2040, and including the following sub-projects:

**Cruise Visitor Centre** – Development of a dedicated cruise visitor arrival centre.

**Cruise Port Terminal** – Investigation of the potential delivery of a cruise port terminal at the current Port of Newcastle site that can provide home port facilities, as well as the investigation of alternative location and/or management options.

**Visitor servicing and industry development** – There is a need for improved servicing of cruise visitors and industry education to service the cruise sector better.

### Newcastle Airport Expansion

To truly be the airport the region deserves, Newcastle Airport is proposing that the runway it accesses from RAAF Base Williamstown should be widened, strengthened and upgraded to a 'Code E' aircraft standard. This will allow the airport to safely land longer-range, greater capacity aircraft, increasing the viability of Newcastle as a new destination for domestic and international airline partners. Further enhancements to the airport terminal will also be required to facilitate forecast growth with the runway upgrade.

This will open up the Hunter Region for much-needed longer-range international passenger services with increased freight capabilities – to the significant benefit of the Hunter community, NSW and Australia more broadly.

Newcastle Airport commissioned independent economic impact assessments by Synergies Economic Consulting and Morrison Low to estimate the benefits that can be expected from the runway upgrade project. The reports conclude that, in the next 20 years, spending \$150M on the runway and terminal upgrades will boost regional economic income by \$12.7B and create 4,410 new full-time jobs in the region that otherwise wouldn't have been achieved through natural airport growth.

## Connectivity and Capacity Initiatives

Initiatives	Timeframe	Stakeholders	Lead Organisation	Notations
<b>Accommodation Audit</b>	●○○	City of Newcastle Newcastle Tourism Industry Group	City of Newcastle	<ul style="list-style-type: none"> <li>Conduct a detailed accommodation audit to inform the Economic Development Investment Prospectus.</li> </ul>
<b>Cruise Industry Plan</b>	○●○	State Government Port of Newcastle DSSN City of Newcastle	Port Authority of NSW	<ul style="list-style-type: none"> <li>Undertake a Cruise Plan for delivery of cruise infrastructure and services. This should be developed in partnership between City of Newcastle and Port of Newcastle, taking into consideration opportunities identified in the Port of Newcastle Port Master Plan 2040.</li> </ul>
<b>Newcastle Airport Expansion</b>	○●○	Newcastle Airport City of Newcastle Port Stephens Council Hunter Joint Organisation DSSN State and Federal Government	Newcastle Airport	<ul style="list-style-type: none"> <li>Newcastle Airport to continue to advocate for funding of the Newcastle Airport upgrade as outlined in the 2036 Newcastle Airport Vision.</li> </ul>
<b>Visitor Transport and Connectivity Review</b>	○●○	Newcastle Transport Hunter Joint Organisation City of Newcastle Newcastle Airport Port of Newcastle Transport NSW	Newcastle Transport	<ul style="list-style-type: none"> <li>Consider a transport and connectivity review; and</li> <li>Deliver a whole-of-region transport plan that addresses both residential and visitor transport needs.</li> </ul>
<b>Newcastle Airport Airline Attraction Business Case</b>	○●○	Newcastle Airport City of Newcastle Port Stephens Council Hunter Joint Organisation DSSN	Newcastle Airport	<ul style="list-style-type: none"> <li>Promote opportunities for attraction of additional carriers to Newcastle Airport;</li> <li>Develop a business case and undertake ongoing presentations and 1:1 discussions with potential airlines.</li> </ul>
<b>Broadmeadow Light Rail Extension</b>	○○●	State Government Transport NSW City of Newcastle	State Government Transport NSW	<ul style="list-style-type: none"> <li>Advocate for investment in the light rail extension;</li> <li>Collaborate and provide inputs to concept plans for delivery of the light rail where possible; and</li> <li>Undertake/provide input into the strategic planning of future transport corridor provision to ensure future viability of light rail extension.</li> </ul>







## Theme 3:

# Nature, Coastal and Wellness

**Leveraging Newcastle's unique coastal position and surrounding natural assets to create compelling and accessible experiences through product development and supporting infrastructure, facilities and services.**

Newcastle has amazing nature assets that are in close proximity to the CBD and support an active lifestyle by residents that is unparalleled by many cities in Australia. Key assets include beaches, ocean baths, parks and reserves, as well as road and mountain biking experiences within close proximity.

There is a need to reinforce these key natural assets through public and private sector investment in key precincts that are drivers for visitation and experience.



## Priority Initiatives

### Newcastle and Merewether Ocean Baths Precinct Redevelopment

The Newcastle and Merewether Ocean Baths are popular amongst Newcastle residents and visitors, however both facilities are in need of improvement and provide opportunity for enhancement.

Reinvigoration of these sites should include activation to enhance the experience for locals and visitors.

### Bathers Way and Coastal Revitalisation Projects

Bathers Way is largely complete, however there are a few links that still require finalisation. The walk is used by residents and visitors alike and once complete will provide a must-do experience for visitors to Newcastle.

### Harbour Foreshore Masterplan Delivery

The foreshore precinct is a large area of open space in proximity to the CBD, harbour and beach front that would benefit from investment and activation.

This includes an improved public space offer and commercial investment opportunities in the area.

### Blackbutt Reserve Plan of Management and Masterplan

Blackbutt Reserve is a unique nature-based destination in Newcastle in close proximity to the CBD.

An updated Plan of Management and Masterplan for Blackbutt Reserve could consider wildlife and adventure activities as tourism attractions, while maintaining the environmental value of the reserve.

This should also take into consideration future opportunities for the existing exhibits at the Reserve, including:

Future maintenance, investment, improvements and/or changes to exhibits; and

Possible partnership opportunities with other sanctuaries and/or Newcastle products.

### Glenrock Conservation Area Amenity Improvements

Investment in public amenity improvements (car parking and public toilets) in the Glenrock Conservation Area with a focus on the following areas in Newcastle and Lake Macquarie LGA: Hickson St precinct, Dudley Beach car park, walking track renewals, Bombala St walking track upgrade and Yuelarbah car park.

These works will greatly improve the accessibility and visitor experience of Glenrock Conservation Area. Planning and design work is completed and implementation is currently underway for some projects.

## Richmond Vale Rail Trail Development

The Richmond Vale Rail Trail is a proposed 32km cycling and walking track along the former Richmond Vale rail line between Kurri Kurri and Hexham, along the former Chichester to Newcastle water pipeline between Shortland and Tarro, and through the Hunter Wetlands National Park.

It would provide a great active transport choice for locals and visitors, passing through old railway tunnels, over bridges and amongst wildlife habitats while linking Newcastle to the Hunter Valley via the Hunter Wetlands and Interpretive Centre.

The proposal is being put forward by City of Newcastle, Cessnock and Lake Macquarie councils, with funding contributions from National Parks and Wildlife Service and Donaldson Conservation Trust.





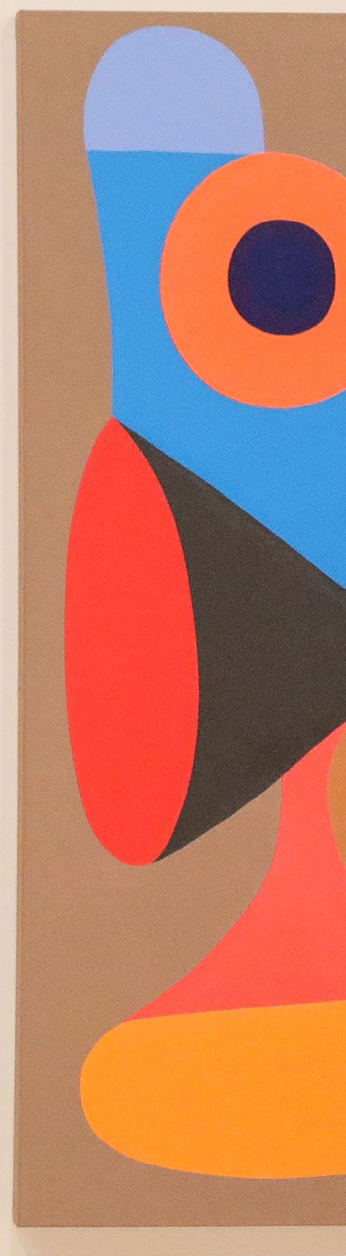
## Nature, Coastal and Wellness Initiatives

Initiatives	Timeframe	Stakeholders	Lead Organisation	Notations
<b>Newcastle and Merewether Ocean Baths and Precinct Redevelopment</b>	●○○	City of Newcastle Private Sector	City of Newcastle	<ul style="list-style-type: none"> <li>Undertake concept masterplans for each of the ocean baths identifying public infrastructure improvements;</li> <li>Seek activation of sites based on community consultation.</li> </ul>
<b>Bathers Way and Coastal Revitalisation Projects</b>	●○○	City of Newcastle	City of Newcastle	<ul style="list-style-type: none"> <li>Completion of Bathers Way and Coastal Revitalisation Projects to be allocated to future works programs.</li> </ul>
<b>Blackbutt Reserve Plan of Management and Masterplan</b>	●○○	City of Newcastle	City of Newcastle	<ul style="list-style-type: none"> <li>Update the Plan of Management and prepare a Masterplan for Blackbutt Reserve that considers delivery of nature-based tourism experiences that drive visitation in key market segments;</li> <li>Future opportunities for consideration of the existing exhibits at the Reserve include: <ul style="list-style-type: none"> <li>Future maintenance, investment, improvements and/or changes to exhibits; and</li> <li>Possible partnership opportunities with other sanctuaries and/or Newcastle products.</li> </ul> </li> </ul>
<b>Foreshore Park Masterplan</b>	●○○	City of Newcastle	City of Newcastle	<ul style="list-style-type: none"> <li>Ensure the foreshore precinct has consideration of its important tourism and events role, and connectivity value when preparing the new Masterplan.</li> </ul>

Initiatives	Timeframe	Stakeholders	Lead Organisation	Notations
<b>Glenrock Conservation Area Amenity Improvements</b>	○●○	NSW National Parks and Wildlife Service City of Newcastle Lake Macquarie City Council	NSW National Parks and Wildlife Service	<ul style="list-style-type: none"> <li>Implement and continue to undertake amenity development projects in the Glenrock Conservation Area to improve appeal, access, car parking and servicing for visitors.</li> </ul>
<b>Richmond Vale Rail Trail Development</b>	○○●	City of Newcastle Cessnock City Council Lake Macquarie City Council National Parks and Wildlife Service, Donaldson Conservation Trust	National Parks and Wildlife Service	<ul style="list-style-type: none"> <li>Complete environmental assessment and concept design;</li> <li>Complete environmental impact statement (EIS) for the Hunter Wetlands National Park;</li> <li>Development Application (DA) process involves assessment by Council and determination by the Hunter and Central Coast Joint Regional Planning Panel.</li> </ul>

● 1-2 Years   ● 3-4 Years   ● Beyond Current DMP





## Theme 4:

# Creativity, Culture and Heritage

**Creating spaces and experiences that allow Newcastle's creativity, culture and heritage to develop and flourish, whilst ensuring the preservation, protection and improvement of owned and natural assets. Showcasing diverse historical narratives, and telling the stories of local makers and creators.**

A unique competitive advantage of Newcastle when compared to other beachside destinations is its creative industry and heritage assets.

These experiences, in combination with outstanding coastal attractions, strengthen the appeal of Newcastle as a leisure destination.

Opportunities include formalising the Newcastle Cultural Precinct, Fort Scratchley enhancement, heritage building activation, arts and cultural activations and the development of cultural events.



## Priority Initiatives

### Fort Scratchley Heritage Conservation Plan, Interpretive Strategy and Business Plan

Fort Scratchley is Newcastle's premier built heritage attraction. The Fort was built in 1882 to defend the country against a possible Russian attack.

The Fort was actively used in 1942 during the shelling of Newcastle by a Japanese submarine. The site was vacated by defence in 1972 and is managed by a volunteer group and overseen by CN.

There is opportunity to improve the Fort through investment in contemporary interpretation and the addition of professional staff in addition to the volunteer group.

### Newcastle Art Gallery Redevelopment

In order to strengthen Newcastle's reputation as an arts and cultural destination, there is opportunity to establish an iconic art gallery. The vision is to create a gallery that houses Newcastle's extensive art collection and becomes a key visitor attraction.

### Flagship Cultural Event

Newcastle has limited major cultural events within its calendar. Most of the large scale events are sports and recreation-related. In order to strengthen Newcastle's arts and cultural offering, there is a need to strengthen the events calendar to incorporate the arts sector.

### Nobby's Lighthouse Redevelopment

Undertake a Masterplan and Business Case for the refurbishment and activation of Nobbys Lighthouse to establish it as a premier heritage attraction for Newcastle. This could include consideration of expansion of current uses to include:

Museum and/or gallery;

---

Improved activations;

---

Food and beverage facilities; and/or

---

Contemporary interpretation including digital media and VR/AR.

---

## Creativity, Culture and Heritage Initiatives

Initiatives	Timeframe	Stakeholders	Lead Organisation	Notations
<b>Flagship Cultural Event</b>	●○○	City of Newcastle State Government and Arts SectorCity	City of Newcastle	<ul style="list-style-type: none"> <li>Support ongoing development and delivery of a flagship cultural event and increase awareness of the cultural and arts offering in Newcastle.</li> </ul>
<b>Newcastle Museum and Museum Park</b>	●○○	City of Newcastle	City of Newcastle	<ul style="list-style-type: none"> <li>Continue Newcastle Museum's revitalisation to improve engagement including repurposing of former Newcastle Shop/Cafe for visitor use, as well as enhancement of recently transformed Museum Park through events and outdoor exhibition space focusing on Aboriginal heritage links.</li> </ul>
<b>Aboriginal Product Development</b>	●○○	City of Newcastle Awabakal and Worimi Communities Guraki Aboriginal Advisory Committee Destination NSW NSW Aboriginal Tourism operators Council (NAITOC)	City of Newcastle Awabakal and Worimi Communities Guraki Aboriginal Advisory Committee	<ul style="list-style-type: none"> <li>An audit of key cultural heritage sites and exploration of ways to interpret and package Aboriginal cultural experiences.</li> </ul>
<b>Fort Scratchley Heritage Conservation Plan, Interpretive Strategy and Business Plan</b>	○●○	City of Newcastle Fort Scratchley Historical Society (FSHS)	City of Newcastle, FSHS	<ul style="list-style-type: none"> <li>Undertake a Heritage Conservation Plan, Interpretive Strategy and Business Plan for Fort Scratchley to guide potential tourism activation and use of the site with consideration to future use and management.</li> </ul>
<b>Newcastle Art Gallery Redevelopment</b>	○●○	City of Newcastle	City of Newcastle	<ul style="list-style-type: none"> <li>Undertake a business case for the establishment of an iconic art gallery in Newcastle.</li> </ul>

● 1-2 Years   ● 3-4 Years   ● Beyond Current DMP



Initiatives	Timeframe	Stakeholders	Lead Organisation	Notations
<b>Nobbys Lighthouse Activation</b>	○●○	Port Authority	Port Authority	<ul style="list-style-type: none"> <li>Undertake a Masterplan and Business Case for the refurbishment and activation of Nobbys Lighthouse to establish it as a premier heritage attraction for Newcastle. This could include consideration of expansion of current uses to include: <ul style="list-style-type: none"> <li>Museum and/or gallery;</li> <li>Improved activations;</li> <li>Food and beverage facilities; and/or</li> <li>Contemporary interpretation including digital media and VR/AR.</li> </ul> </li> </ul>
<b>Victoria Theatre Redevelopment</b>	○●○	Century Venues City of Newcastle	Century Venues	<ul style="list-style-type: none"> <li>Facilitate and support redevelopment of Victoria Theatre where possible including through the planning application process and through identifying funding opportunities and providing advocacy to support redevelopment.</li> </ul>
<b>Civic Theatre Enhancement</b>	○●○	City of Newcastle	City of Newcastle	<ul style="list-style-type: none"> <li>Investigate demand and funding options for enhancement of Civic Theatre Newcastle.; and</li> <li>Prepare a concept plan and business case.</li> </ul>
<b>Arts and Cultural Heritage Strategy and Tourism Activation Program</b>	○●○	City of Newcastle BIA	City of Newcastle	<ul style="list-style-type: none"> <li>Develop a brief and appoint a tourism and heritage interpretation consultant to develop interpretive and tourism activation plans for key heritage sites.</li> </ul>
<b>Public Realm Art Activation and Cultural Interpretation</b>	○●○	City of Newcastle BIA	City of Newcastle	<ul style="list-style-type: none"> <li>Consider public art activations as part of the Arts and Cultural Plans.</li> </ul>
<b>The 'Res' Underground Attraction</b>	○●○	Hunter Water City of Newcastle	Hunter Water	<ul style="list-style-type: none"> <li>Investigate the reopening of 'The Res' and operating this historic underground reservoir as a visitor attraction.</li> </ul>
<b>Newcastle Library and Cultural Centre Redevelopment</b>	○○●	City of Newcastle	City of Newcastle	<ul style="list-style-type: none"> <li>As one of the key cultural sites in Newcastle, redevelopment of Newcastle Library should be explored to include a key cultural experience and enhanced library offering; and</li> <li>Development of a feasibility and business case to support the project.</li> </ul>

● 1-2 Years   ● 3-4 Years   ● Beyond Current DMP











## Theme 5:

# Nightlife, Food, Wine and Ferments

**Building on an already vibrant night-time economy for Newcastle, showcasing bespoke experiences and the city's emerging food and ferments scene. Encourage and facilitate growth of these aspects of the Newcastle offering.**

One of the key constraints to enhancing the night-time economy are the liquor-related laws that are in place in Newcastle. This places constraints on late night dining, bars and nightlife. For Newcastle to reach its potential as a leisure destination, these laws need relaxing in line with changes recently adopted in Sydney and consistent with other destinations.

Further attraction and investment in contemporary food and beverage, and promotion of existing food and beverage establishments will help cement Newcastle as a premier food and entertainment destination.



# Priority Initiatives

## Ongoing Night-time Economy Improvement

The success of this theme is largely dependent on securing ongoing improvement of Newcastle's night-time economy, both through delivery of actions outlined in Newcastle's After Dark Strategy, and through reform of the liquor and night-time economy guidelines introduced by the State Government.

City of Newcastle in conjunction with industry need to advocate for continued improvement and reform to improve the opportunities for food and beverage operators.

## Nightlife, Food, Wine and Ferments Initiatives

Initiatives	Timeframe	Stakeholders	Lead Organisation	Notations
<b>Ongoing Night-time Economy Improvement</b>	●○○	City of Newcastle AHA Newcastle Live Music Taskforce Night economy businesses BIA Newcastle Tourism Industry Group	City of Newcastle	<ul style="list-style-type: none"> <li>Support ongoing improvement of Newcastle's night-time economy through:</li> <li>Delivery of initiatives and actions as outlined in the Newcastle After Dark Strategy (2018);</li> <li>Identification of ongoing key constraints to business growth and attraction; and</li> <li>Advocacy for a review of Newcastle's current licensed venue interventions in order to establish more flexible guidelines that support the development of new night-time offerings and activations that showcase Newcastle's strengths in arts and culture, and boutique food and beverage experiences.</li> </ul>
<b>Development of Arts and Cultural Night-time Activations</b>	●○○	City of Newcastle Private Sector BIA Newcastle Industry Tourism Group	City of Newcastle	<ul style="list-style-type: none"> <li>Include the development of night-time activations within the Arts and Cultural Heritage Strategy and Tourism Activation Program.</li> </ul>
<b>Live Music</b>	○●○	City of Newcastle BIA Newcastle Tourism Industry Group	Industry	<ul style="list-style-type: none"> <li>Expansion of live music opportunities to strengthen the night-time economy through implementation of the Live Music Strategy 2019-2023.</li> </ul>
<b>Development of Events Aligned to Experience Pillars</b>	○●○	City of Newcastle Event Operators Industry	City of Newcastle	<ul style="list-style-type: none"> <li>Develop events aligned with Newcastle's experience pillars.</li> </ul>
<b>Seasonal Activations</b>	○●○	City of Newcastle Event Operators	Private Sector and Industry	<ul style="list-style-type: none"> <li>Develop evening activations such as moonlight cinema in close proximity to the beach which can extend Newcastle's coastal offer into the night.</li> </ul>

● 1-2 Years    ● 3-4 Years    ● Beyond Current DMP





# NEWCASTLE



## Theme 6:

# Events, Festivals and Conferencing

**Building awareness of Newcastle and showcasing product strengths through attracting and developing signature events and growing the business and conferencing events sector. Ensure the protection and improvement of existing assets while developing new infrastructure to meet market needs and support future growth.**

Newcastle is host to a number of major events and festivals throughout the year that entertain residents and attract visitors to the region.

Flagship events include Supercars Newcastle 500 and Surfest. An analysis of events and festivals highlights a large proportion of sports events and there remains opportunity to diversify the range of events on offer in Newcastle.

Events are an important part of the visitor economy in terms of the direct economic contribution they provide but also in the way they bring awareness to destinations. Alignment of events to target visitor markets is a key consideration for event prioritisation.

Conferencing is already a key offer of Newcastle, however there is opportunity to expand markets, collaborate and invest in facilities to support this market.



# Priority Initiatives

## Events Strategy Update

Develop an Events Strategy to identify and attract events to Newcastle that are aligned to target markets and product strengths, as well as balancing the mix of events to ensure positive community and economic outcomes.

In recent years the city has attracted the apex event of Supercars Newcastle 500 in addition to fifty CN land use approvals in 2019 for events classified as medium to large scale. Due to the volume, demand and diversity for event activity and approvals across the LGA, the strategy should provide a framework on best use of community land for event purposes.

Key event opportunities to be explored include:

---

Further development of existing major events;

---

Development of new events, particularly those that are water-based;

---

Diversification of the range of events to include arts and culture; and

---

Attraction of key business events aligned to economic pillars.

---

## Broadmeadow Sport and Entertainment Precinct

Venues NSW is looking to develop the Broadmeadow Sport and Entertainment Precinct into a premier events destination. This precinct will be suited to sports and recreation events as well as open air events and festivals.

## Waterfront Convention and Exhibition Facility

Business Events are a significant contributor to Newcastle's visitor economy and beyond the tourism benefits provide multiple opportunities to leverage social legacy. Newcastle is not well positioned to bid for large scale business events as there is not an appropriately located, scaled or appointed facility capable of servicing more than 800 delegates. The establishment of a waterfront convention and exhibition facility will provide Newcastle with a competitive advantage in securing business events and driving increased visitation.

## Events, Festivals and Conferencing Projects

Initiatives	Timeframe	Stakeholders	Lead Organisation	Notations
<b>Events Strategy Update</b>	●○○○	City of Newcastle	City of Newcastle	<ul style="list-style-type: none"> <li>Develop City of Newcastle Events Strategy.</li> </ul>
<b>Waterfront Convention and Exhibition Facility</b>	●○○○	HCCDC City of Newcastle University of Newcastle	HCCDC	<ul style="list-style-type: none"> <li>Develop a feasibility study and business case for a waterfront, convention and exhibition facility in Newcastle; and</li> <li>Promote private sector investment in the complex or explore a public private partnership.</li> </ul>
<b>Business Event Marketing Opportunities Investigation</b>	●○○○	City of Newcastle, Little National Hotel / QT Hotel / Crystalbrook	City of Newcastle	<ul style="list-style-type: none"> <li>Investigate marketing opportunities to attract business events in line with development of five star accommodation properties.</li> </ul>
<b>Attraction of Large Scale Multi day Sports Events</b>	●○○○	City of Newcastle Newcastle Tourism Industry Group	City of Newcastle	<ul style="list-style-type: none"> <li>Promote sports events opportunities.</li> </ul>
<b>Attraction of Events Aligned to Newcastle's Experience Pillars</b>	●○○○	City of Newcastle Venues NSW Newcastle Tourism Industry Group	City of Newcastle	<ul style="list-style-type: none"> <li>Attract events aligned to destination experience pillars.</li> </ul>
<b>Consolidated Events Register</b>	●○○○	City of Newcastle Newcastle Tourism Industry Group AHA	City of Newcastle	<ul style="list-style-type: none"> <li>Development of a consolidated consumer facing events website capturing all events across the LGA.</li> </ul>
<b>Expand and Enhance Existing Conference Venues (NEX and City Hall)</b>	○●○○	NEX, City of Newcastle	NEX, City of Newcastle	<ul style="list-style-type: none"> <li>Following \$6m external work to City Hall, City of Newcastle to investigate funding opportunities for internal refurbishment.</li> </ul>
<b>Infrastructure Improvement to Open Air Event Venues</b>	○●○○	City of Newcastle	City of Newcastle	<ul style="list-style-type: none"> <li>Develop a strategic plan for open air event venues including consideration of supporting event infrastructure, access and transport.</li> </ul>

● 1-2 Years    ● 3-4 Years    ● Beyond Current DMP







## Theme 7:

# Product Development and Industry Collaboration

**There is a need for industry to create bookable and distributable tourism products and experiences. Private sector investment is critical if Newcastle is to have a diverse visitor offering. To support the development of product, local and state government can facilitate ongoing engagement, education and training.**

If the potential of products and experiences is to be optimised, regional collaboration is required. For example, regional coordination to capitalise on available products and experiences across the Hunter Region is required to create compelling itineraries and increase length of stay in the region.



## Priority Initiatives

### Product Development

Increase bookable experience offering in Newcastle from three to more than twenty, this will make Newcastle competitive with other LGAs. As a benchmark, in 2020 Port Stephens and Hunter Valley each have more than twenty bookable products.

### Regional Product Packaging and Marketing

There are tourism products across Newcastle and the wider Hunter Region that may be packaged to create itineraries for intrastate, interstate and international markets. There is opportunity for Newcastle to lead the development of product packaging, firstly with City of Newcastle products and then expansion to surrounding LGA products.

### Newcastle and Hunter Region Collaboration

There is limited collaboration that occurs across the Hunter Region for tourism and within Newcastle. There is an opportunity for Newcastle Tourism Industry Group to review its structure and charter to ensure it is well placed to deliver on projects identified in the DMP.

There is a need for much greater collaboration within Newcastle – between City of Newcastle and the tourism industry, and within the Newcastle tourism industry.

### COVID-19 Tourism Industry Recovery Plan

COVID-19 has had a significant impact on the visitor economy in Newcastle. Restrictions introduced by the government have led to business closures and loss of tourism and hospitality jobs.

The recovery plan needs to focus on initiatives to support, maintain and reinstate the Newcastle visitor economy.

## Product Development and Industry Collaboration Initiatives

Initiatives	Timeframe	Stakeholders	Lead Organisation	Notations
<b>COVID19 Tourism Industry Recovery Plan</b>	●○○	City of Newcastle	City of Newcastle	<ul style="list-style-type: none"> <li>Establish a Tourism Recovery Advisory Committee;</li> <li>Undertake a baseline impact assessment including a survey of industry;</li> <li>Prepare a Recovery Plan.</li> </ul>
<b>Region Product Packaging and Marketing</b>	●○○	City of Newcastle, NTIG, Neighbouring Councils, LTO's, Newcastle Airport	City of Newcastle, Neighbouring Councils	<ul style="list-style-type: none"> <li>Undertake audits of products that can be promoted and packaged across Newcastle;</li> <li>Work collaboratively across the Hunter Region to package and promote tourism experiences.</li> </ul>
<b>Tourism Capacity Building Project</b>	●○○	City of Newcastle, NTIG	City of Newcastle	<ul style="list-style-type: none"> <li>Develop a series of training and events that facilitate industry development, networking and collaboration.</li> </ul>
<b>Product Development Industry Support</b>	●○○	City of Newcastle, Key Industry NTIG	Private Sector NTIG City of Newcastle	<ul style="list-style-type: none"> <li>Initiate and invest in products and experiences.</li> <li>Support industry growth and sustainability, particularly the development of product with training and education;</li> <li>Provide visitor economy research to guide investment.</li> </ul>

● 1-2 Years   ● 3-4 Years   ● Beyond Current DMP



# Appendix





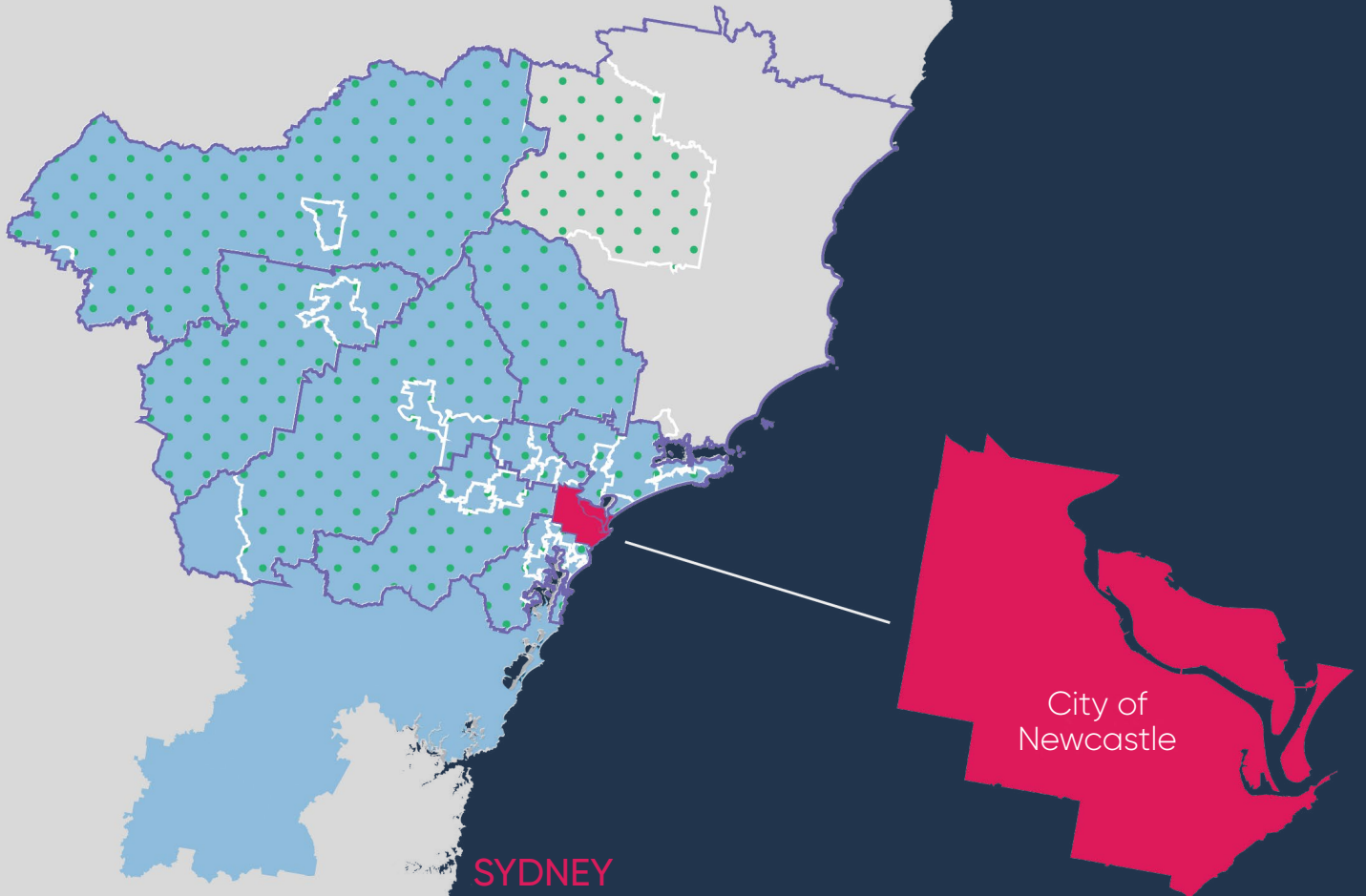




COFFS HARBOUR

NSW

PORT MACQUARIE



City of Newcastle

SYDNEY

WOLLONGONG

**LEGEND**

-  Destination Sydney Surrounds North
-  Tourism Research Australia
-  Department of Planning, Industry and Environment
-  City of Newcastle
-  New South Wales

# Strategic Context

## Newcastle Regional and Local Context

Newcastle is located on the NSW coastline, approximately 160kms, or two hours' drive north of Sydney. Located at the mouth of the Hunter River, Newcastle is Australia's seventh largest city by population, and the second oldest.

## Tourism Regions

### Hunter Region

Newcastle forms part of the Hunter Region (as defined by the NSW Department of Planning, Industry and Environment (DPIE), which overlaps much of the DSSN footprint and includes the local government areas of Port Stephens, Newcastle, Lake Macquarie, Cessnock, Maitland, Dungog, MidCoast, Singleton, Muswellbrook and the Upper Hunter.

### Destination Sydney Surrounds North (DSSN)

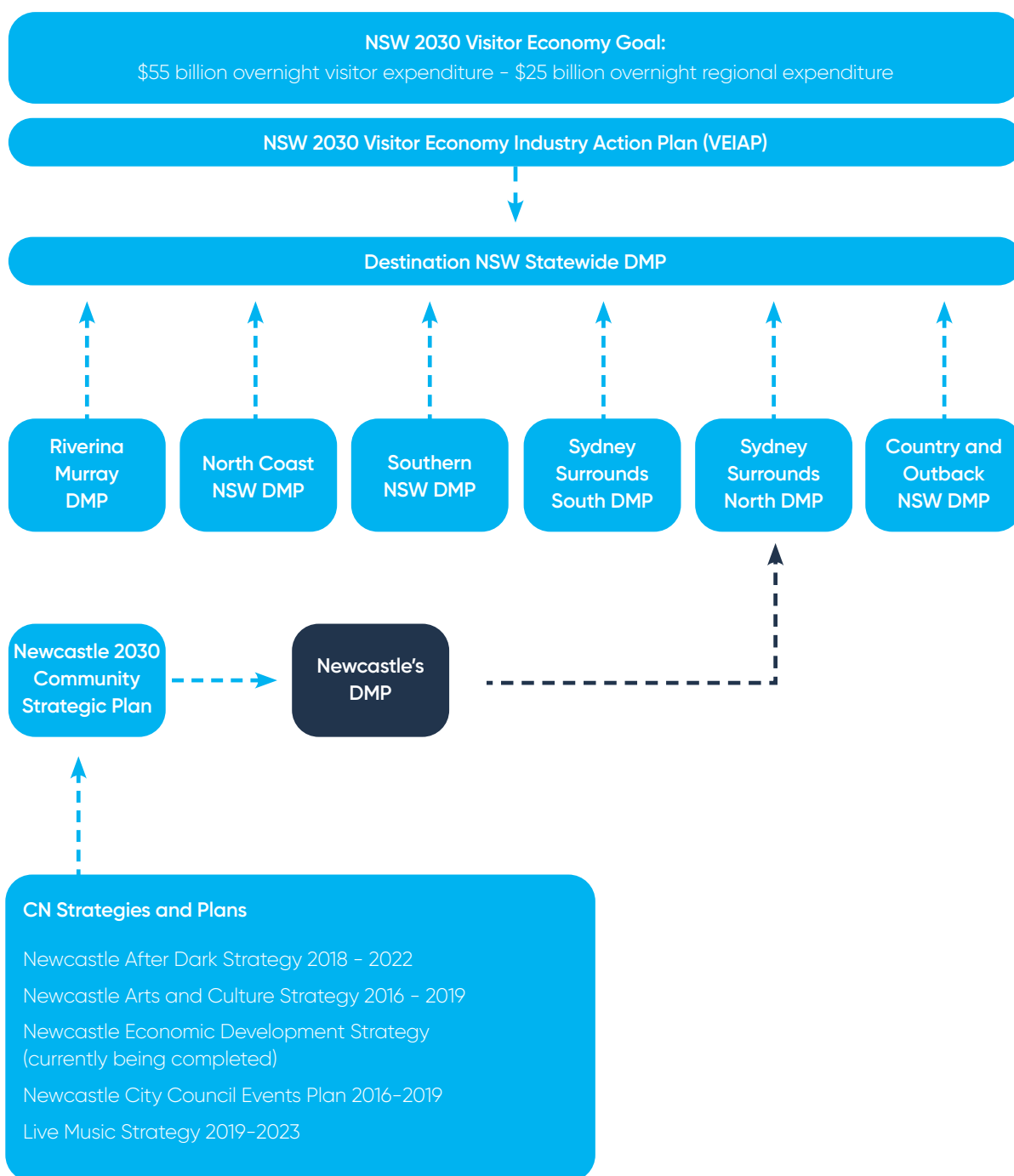
Newcastle is included in part of the DSSN footprint, as defined by Destination NSW, which includes the LGAs of Blue Mountains, Central Coast, Cessnock, Dungog, Hawkesbury, Lake Macquarie, Maitland, Muswellbrook, Penrith, Port Stephens, Singleton, and Upper Hunter Shire.

As with most of the six Destination Networks that make up Regional NSW, DSSN is a diverse geographical area with a number of NSW hero destinations including Blue Mountains, Central Coast, Hunter Valley, Port Stephens and Newcastle. When compared to other destination networks, it is smaller, however, it is one of the most developed and diverse in tourism product.



## Strategic Policy and Development Context

At a regional level, a range of strategies help guide the growth of Newcastle's visitor economy, particularly through actively focusing on the potential role Newcastle can play as a hub for the wider Hunter Region.



In addition to the review of CN documents and state government tourism plans, other key documents reviewed that have a significant influence on shaping the visitor economy include:

Greater Newcastle Metropolitan Plan 2036;

Newcastle Tourism Industry Group Strategic Plan 2017–2018;

National Parks Service (NPS) General Management Plan; and

Other relevant State Government agency strategies and plans.

In recent years, a number of key investment initiatives have taken place in Newcastle that are dramatically reshaping the city, and have led to a noticeable shift in the perception of the city as a place to live, work, invest and visit. Key projects that have had a significant impact on Newcastle are listed below.

### Honeysuckle Urban Renewal Project

A redeveloped 50-hectare site now supports a diverse mix of employment, residential, tourism, recreation and public domain uses for the community. It also celebrates and enhances heritage and is known as one of the most successful urban renewal programs in NSW.

### Revitalise Newcastle

Revitalise Newcastle was established as part of the Urban Transformation and Transport Program for NSW. The program includes a \$650 million government investment to revitalise Newcastle's city centre by delivering new transport, creating jobs and connecting the city to the waterfront. The program is comprised of three elements in varying stages of completion:

A transport interchange and light rail system linking Newcastle West to Pacific Park (East Newcastle);

Revive Hunter and Scott Streets; and

Revitalise the heavy rail corridor with new public spaces, housing, commercial and retail uses.

### Renew Newcastle

This was an initiative that started in 2008 to respond to the high number of empty spaces in Newcastle CBD, and comparative lack of affordable spaces for creative projects and artists. The initiative promoted the transition of empty shops and offices within Newcastle CBD for artists and creative projects.

### Coastal Revitalisation Project

City of Newcastle is currently conducting a Coastal Revitalisation project which began in 2010 with the vision to revitalise the coastline to provide spaces and places for people to enjoy the coastal lifestyle while also protecting the natural environment. The project has focused on improving and redeveloping facilities, amenity, and presentation of the coastline including improving preservation and accessibility across existing and new assets including Anzac Walk, Bathers Way and beaches.

**Newcastle is undergoing rapid transformation, the delivery of key projects such as Honeysuckle Urban Renewal Project, Revitalise Newcastle, Renew Newcastle and the Coastal Revitalisation Project has led to extensive investment by public and private sectors leading to improved amenity, growth in jobs and enhancement of tourism products and experiences. There are further works required to deliver the vision these projects have for Newcastle which need to be considered in the Destination Management Plan. Delivery of these projects will assist in growing the visitor economy.**



## Tourism Governance

Ensuring the ongoing sustainability and growth of the visitor economy, the City of Newcastle plays a central role in the delivery of tourism initiatives and visitor servicing. In addition, there are many organisations that directly and indirectly influence tourism service delivery in Newcastle and the broader Hunter Region including:

- Australian Hotels Association

---

- Destination NSW

---

- Destination Sydney Surrounds North

---

- Hunter & Central Coast Development Corporation

---

- Hunter Business Chamber

---

- Hunter Joint Organisations of Councils

---

- Neighbouring LGAs and LTOs

---

- Newcastle Airport

---

- Newcastle Tourism Industry Group

---

- NSW National Parks and Wildlife Service

---

- Other relevant NSW Government agencies

---

- Tourism Accommodation Association

---

- Tourism Australia

---

- University of Newcastle

---




The following table provides an overview of the key organisations that have a direct role in relation to providing destination management services in the City of Newcastle.

### Newcastle Visitor Economy Roles and Responsibilities

	Market Research	Capital Investment in Infrastructure	Tourism Industry Development	Tourism Product Development	Events, Leisure and Business	Advocacy	Industry Engagement and Education	Marketing	Visitor Information Services	Visitor Experience
<b>NSW State Government Agencies</b> Support and investment in infrastructure that assist visitor economy growth.	✓	✓			✓	✓	✓			
<b>Destination NSW</b> Lead government agency for the NSW tourism and major events sectors. Role is to position NSW as one of the world's premier tourism and events destinations and achieve the NSW Government's goals of tripling visitation expenditure by 2030.	✓		✓	✓	✓		✓	✓		
<b>Destination Sydney and Surrounds North [Destination NSW]</b> Destination Sydney Surrounds North (DSSN) is one of six NSW Destination Networks responsible for delivering on the NSW Government's objective to triple visitor spending by 2030.	✓		✓		✓	✓	✓			
<b>City of Newcastle</b> City of Newcastle Council (CN) is the primary promoter, event facilitator and provider of visitor services for the LGA. CN own, operate, maintain and promote many physical and natural assets that support the visitor economy within the LGA.	✓	✓	✓		✓	✓	✓	✓	✓	✓
<b>Tourism Industry Associations</b> Local and national tourism and hospitality associations, with key advocacy and industry partnership roles. eg AHA, TAA, NTIG.	✓		✓		✓	✓	✓	✓		✓
<b>Tourism Industry Operators and Private Sector</b> Delivery of local products, services and experiences.	✓	✓		✓	✓	✓		✓	✓	✓







## Discussion

The City of Newcastle has recently established a dedicated tourism function with the development of a new service unit plan which combines functions of Tourism and City Events. The Destination Management Plan comes at an optimal time to support the visitor economy.

Destination management is a responsibility shared beyond the immediate Tourism Team in City of Newcastle with many visitor economy key assets managed and operated by other CN units including event facilities, the foreshore, ocean baths, parkland, sporting facilities, and arts and cultural assets, as well as services such as marketing and visitor information.

The City of Newcastle manages and funds tourism activity and initiatives along with the provision of in-region visitor servicing through the Visitor Information Centre. Industry stakeholders provide financial contribution to CN-managed tourism initiatives on an opt-in basis and NTIG provides industry education and networking opportunities.

To achieve more cohesive commitment, investment and involvement in visitor economy growth and sustainability there is a need for increased collaboration and partnerships between City of Newcastle, NTIG and industry.

### Key Challenges and Opportunities:

Role of Newcastle as a hub for the Hunter Region;

---

Regional industry fragmentation and lack of collaboration;

---

Lack of industry knowledge and networking;

---

Maintaining relationships with stakeholders including Destination Sydney Surrounds North, Destination NSW and neighbouring LGAs;

---

Optimising tourism resource allocation;

---

Lack of community and business understanding of the tourism's contribution to the economy; and

---

Increasing collaboration between City of Newcastle and Industry.

---



# Visitor Economy Profile

## Visitor Economy Snapshot 2019

This snapshot was prepared for the 2019 calendar year. The impacts of the COVID-19 pandemic are not covered in the data provided and would provide a distorted view of the visitor economy.

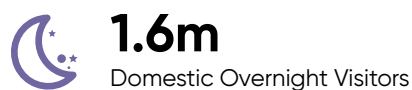
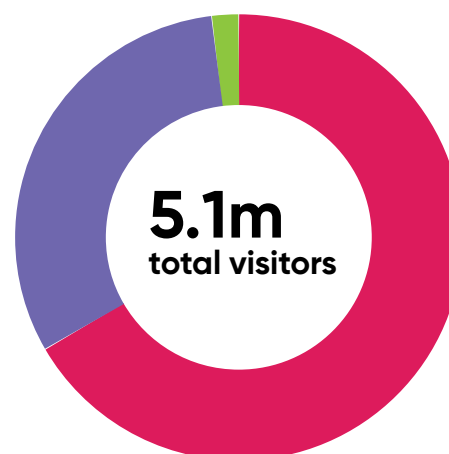
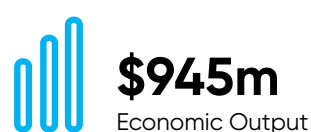
Newcastle has a strong and diverse economy, with an output of \$35.1 billion annually, of which tourism contributes an estimated \$945 million or 2.7% of the total output, and 4,950 or 4.8% of total jobs.

Within the tourism sector, accommodation and food services is the most significant industry sector, contributing 37% of total tourism output, and 49.7% of industry jobs.

In 2019, Newcastle attracted an estimated 5.1 million visitors, comprised of 3.4 million domestic daytrip visitors (67%), 1.6 million domestic overnight visitors (31%), and 105,800 international visitors (2%). This represented a growth of 1.4 million total visitors from 2010, comprising an estimated 680,500 additional day trip visitors, 690,500 additional overnight visitors and 30,500 additional international visitors annually.

Based on historic visitation, forecast estimates, and a high growth rate scenario based on potential investment, Newcastle is predicted to attract significant additional visitation in the future. Forecast visitation modelling estimates that Newcastle will attract an additional 1.83 million visitors annually by 2028, comprised of an additional 757,300 daytrip visitors, 1.01 million overnight visitors and 159,144 international visitors.

## Visitor Economy Highlights 2019



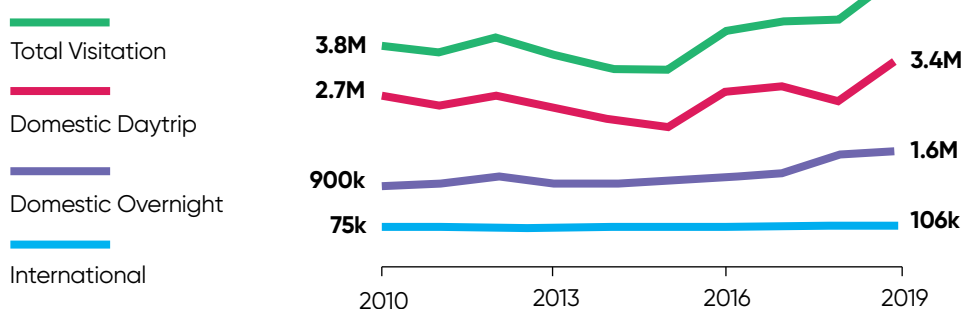
*These estimates were prepared prior to the impacts of COVID-19 on the Newcastle visitor economy.*

Across daytrip, overnight and international markets, Newcastle has a lower proportion of holiday leisure visitors, with overnight holiday leisure visitors comprising only 19%. This represents a key growth opportunity to be supported by targeted branding and marketing, and strategic investment in experiential product development and bookable product to appeal to this market.

The relatively low rate of growth in international visitors demonstrates that at the current time Newcastle is primarily a domestic visitor destination.

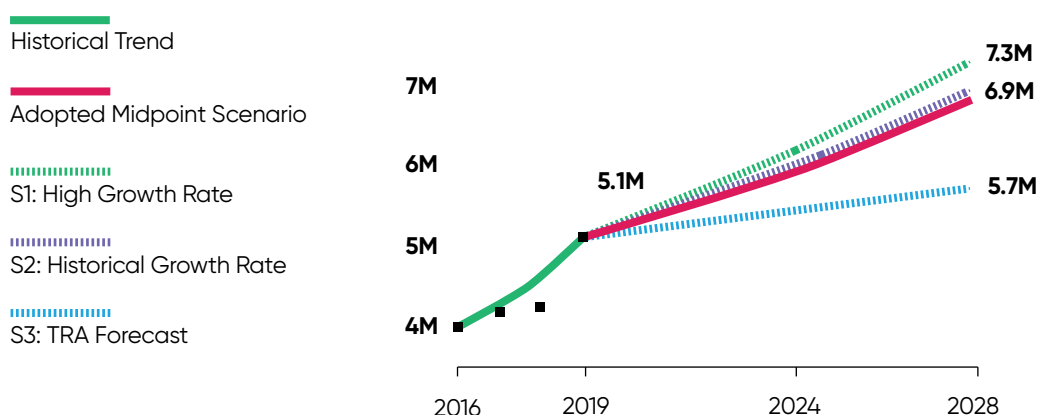
This is likely influenced by both a low destination presence in the international market due to the lack of a cohesive identity and branding to lead promotion and marketing.

### Historical Visitation to the City of Newcastle



↑  
**+1.4m**  
Additional  
Visitors per  
annum from  
2010-19

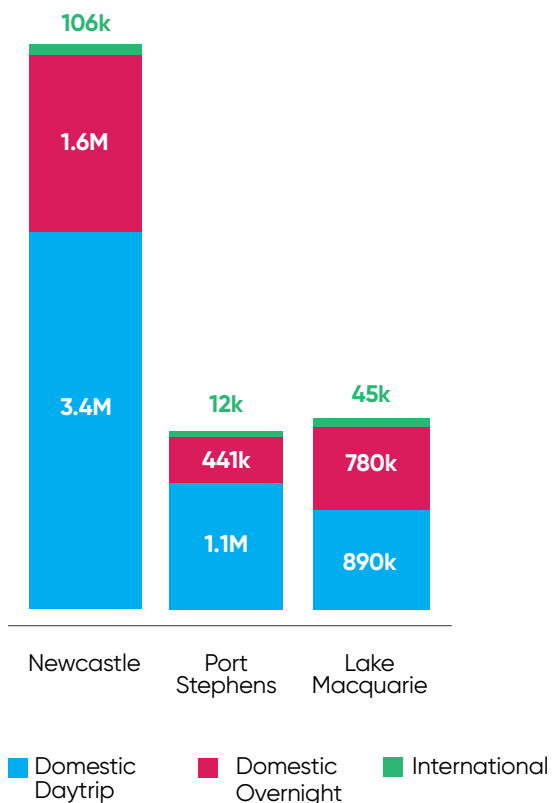
### Newcastle Visitor Projections 2019 to 2028



↑  
**+6.9m**  
Total Visitors  
by 2028



**Surrounding LGA  
Visitation Comparison**



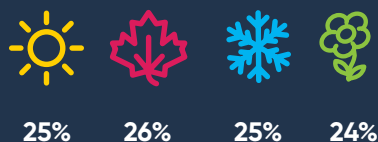
Projected growth in visitation highlights the need for continued investment in tourism products, infrastructure and experiences to meet projected demand.

Whilst organic growth in visitation will likely occur, there is opportunity to target specific markets that will decrease seasonality gaps and increase visitor yield.

Visitors to Newcastle participate to a higher degree in eating out and shopping, reflecting the strength of Newcastle’s food and retail sectors. Going to the beach is surprisingly a low activity for visitors compared to other beachside destinations and highlights the low level of summer holiday travel to Newcastle which is a key strength of competitor locations.

## Domestic Day trip Visitor Profile 2019

### Seasonality



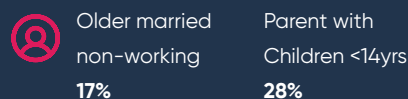
### Purpose of Visit



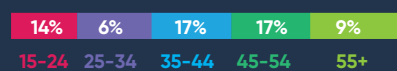
### Place of Origin



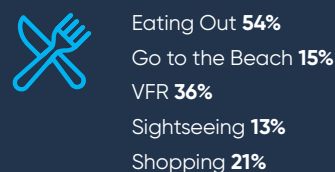
### Lifecycle Group



### Age Profile

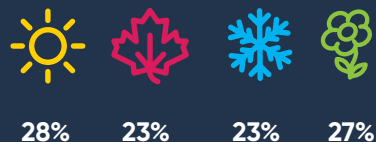


### Activities



## Domestic Overnight Visitor Profile 2019

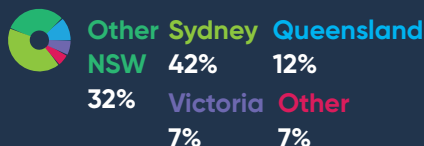
### Seasonality



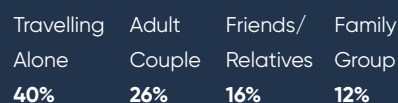
### Purpose of Visit



### Place of Origin



### Travel Party



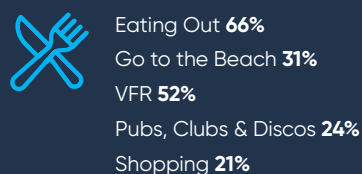
### Age Profile



### Top Accommodation Types



### Activities

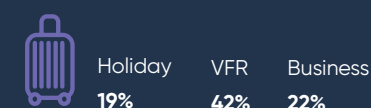


### Transport Method

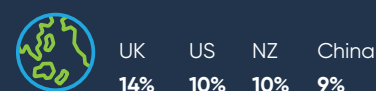


## International Visitor Profile 2019

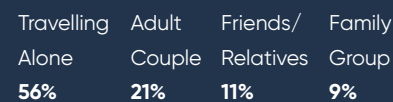
### Purpose of Visit



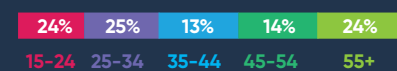
### Country of Origin



### Travel Party



### Age Profile



### Top Accommodation Types



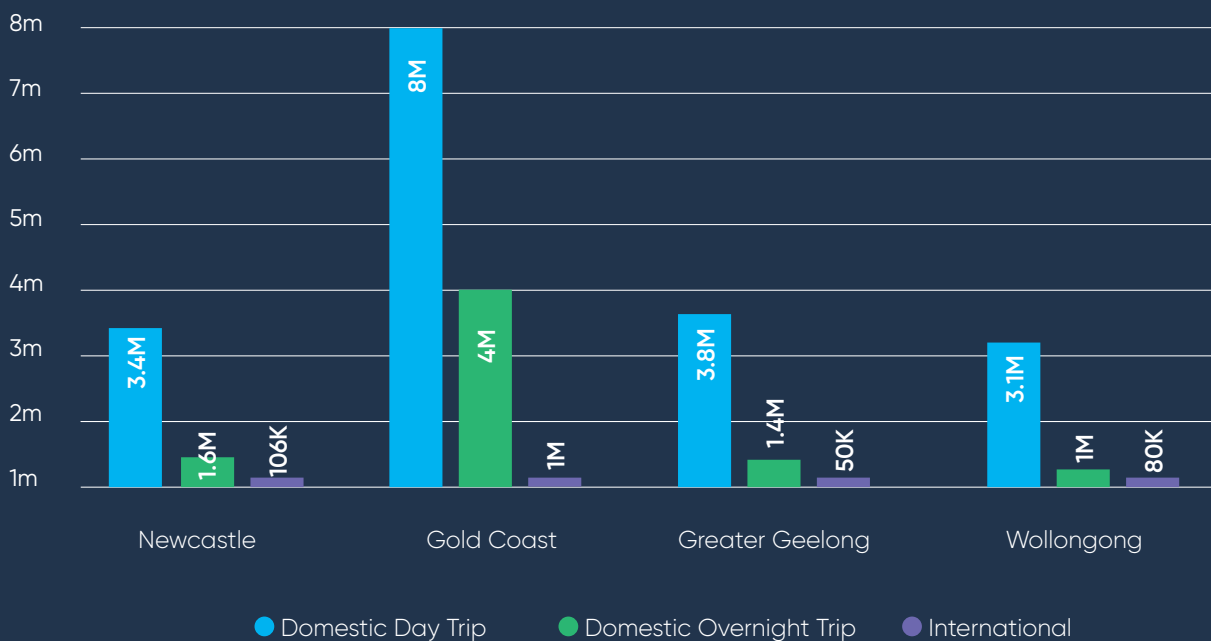
### Activities



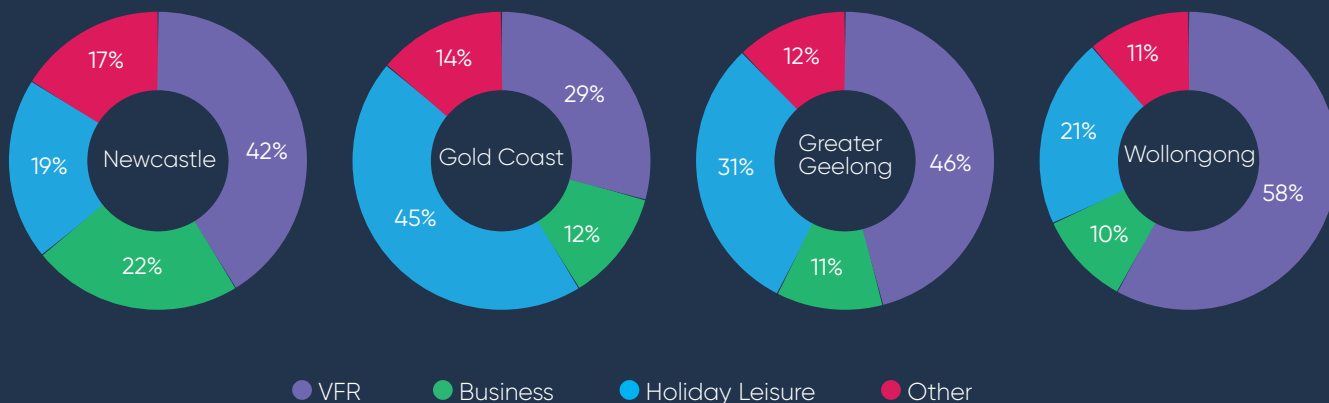


# Competitor Analysis 2019

## Number of Visitors



## Purpose of Visitors













## Discussion

The historic growth rate and projected growth of visitation to Newcastle shows a positive investment environment for Newcastle to leverage from pre COVID-19. This should provide confidence to businesses to continue to invest in Newcastle and support tourism initiatives following a COVID-19 recovery phase.

Sydney and Regional NSW are the overwhelming key market for Newcastle. However, with a port that can support cruise ships and a major airport there is great potential to grow both domestic interstate visitors from Victoria and South East Queensland. Strategies to attract international visitation should be developed in consultation with Newcastle Airport as the suite of bookable experiences available in Newcastle expands.

Key findings from analysis of the existing visitor market include:

Low leisure visitation;

---

Low levels of international visitation, however significant opportunity to grow this market, particularly NZ and University of Newcastle International student VFR;

---

Vast majority of visitors from regional NSW or Sydney;

---

Activity profile highlights the strength of Newcastle's night-time economy, reflecting the opportunity to promote Newcastle as a visitor hub for the Hunter Region; and

---

Visitation growth highlights the continued need for investment in product, accommodation diversity and infrastructure.

---



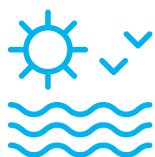
# Products and Experiences Profile

## Overview of Product Strengths

There were a total of 301 activities and attractions, 56 key events and 680 accommodation providers identified the Newcastle LGA. However, of the activities and attractions, only three are considered bookable and visitor ready. Of the accommodation providers identified, 587 are considered to be non-commercial.

Complementing Urban Enterprise research, the City of Newcastle's research has identified five experience pillars, which when viewed collectively and positioned against the geographical layout of the city, provide a compelling visitor proposition for Newcastle as a leisure destination.

The products and experience that are built around these experience pillars will help tell the Newcastle story, increase destination awareness and drive demand.



### Aquatic and Coastal

Products and experiences that highlight Newcastle's coastal assets and enable visitors to experience the raw and rugged beauty of the coastline in a way that is safe, sustainable and engaging.



### Active and Outdoors

Newcastle has infrastructure to support an active and outdoor lifestyle for locals and visitors alike. Products and experiences that enable visitors to explore the natural beauty of Newcastle from the bush and parklands to coastal walks and suburban bike trails, either as a guided or independent experience.



### Arts, Culture and Heritage

There is more to Newcastle than what is initially perceived by the visitor. The Newcastle story is rich and varied, coveted in its history, art, creative talent and architecture. This story can be told through products and experiences that showcase the breadth of expertise and talent that creates a connection with the place and its people.



### Culinary

Newcastle values the delivery of quality culinary products and experiences, especially those that showcase local produce and ingredients. Newcastle's tourism proposition can be supported with consistent, high quality products and experiences - from coffee, quirky dining, local craft beverages and value-add products through to high-end fine dining experiences.



### After Dark

A vibrant nightlife with unique dining, entertainment and bespoke venues in a safe environment means our visitors can be assured that they can enjoy Newcastle day and night.

*Note: Leisure Events, both spectator and participatory straddle all experience pillars*







## Audit of Tourism Products and Experiences

### Aquatic and Coastal Active and Outdoors

Newcastle has a wealth of coastal and nature-based assets and associated attractions and activities, and also acts as a hub from which to explore other signature experiences in close proximity to Newcastle.

In addition to Bar Beach, Dixon Park Beach, Horseshoe Beach, Merewether Beach, Newcastle Beach, Nobbys Beach and Stockton Beach, this coastline also supports a range of other visitor attractions to explore such as Nobbys Breakwall and Lighthouse, and the Bogey Hole. The ocean baths at Newcastle Beach and Merewether Beach also provide a unique experience.

Key non-coastal attractions that support a range of other active and passive recreation activities include Blackbutt Reserve and Glenrock State Conservation Area.

Product enhancement opportunities that have been identified include:

Product and activation opportunities as part of the Newcastle and Merewether Ocean Baths and Precinct Redevelopment;

Bathers Way and Coastal Revitalisation Projects;

Enhancement and development of activities and opportunities within Blackbutt Reserve as part of the Blackbutt Reserve Plan of Management and Masterplan;

Expansion of mountain biking trails and facilities at Glenrock State Conservation Area;

Improvements to public amenity at entrance points to Glenrock State Conservation Area eg access and parking;

Summer activation of beaches;

Harbour Foreshore Masterplan Delivery including all-abilities playspace, events and attractions; and

The Richmond Vale Rail Trail proposed 32-kilometre cycling and walking track between Kurri Kurri and Newcastle.

## Arts, Culture and Heritage

Newcastle has a range of existing arts and cultural assets, including the Newcastle Art Gallery, Civic Theatre, Victoria Theatre, Newcastle Library, Fort Scratchley, Newcastle Museum, Nobby Lighthouse and The Res - with many of these managed by City of Newcastle.

In recent years Newcastle has forged a reputation within the arts, culture and creative spaces through development of the Renew Newcastle program, which has created a lasting legacy of arts spaces, activations and a strong local artist community.

However, while the city has a range of existing arts and cultural assets, many of these spaces require upgrade and/or revitalisation in order to effectively support continued growth within the arts and culture space, and to enable them to act as motivating visitor assets reflective of a major city.

Newcastle is the traditional country of the Awabakal and Worimi people, it is also one of Australia's earliest European settlements, and as such has a multi-layered history with significant Aboriginal, convict and industrial heritage narratives to be explored and promoted. Newcastle Museum is prominent in the interpretation and promotion of Aboriginal and industrial heritage, providing context and explanation of Newcastle's distinct past, present and future to visitors. The new Visitor Information Centre (VIC) provides an example of indigenous heritage interpretation.

The City of Newcastle has also made developments to recognise and incorporate traditional owner stories into the cityscape of Newcastle, with the introduction of eight dual-named locations, and the recent introduction of the Niiarnnumber Burrai, and Our Country VR technology as part of NAIDOC Week in 2018.

Product enhancement opportunities that have been identified include:

Newcastle Art Gallery;

---

Fort Scratchley Business Plan;

---

Development of a Flagship Cultural Event;

---

Nobby's Lighthouse Redevelopment;

---

Aboriginal Product Development;

---

Victoria Theatre Redevelopment;

---

Civic Theatre Enhancement;

---

Arts and Cultural Heritage Plan and Tourism Activation Program for CN-owned attractions;

---

Newcastle Library and Cultural Centre Redevelopment;

---

Public Realm Art Activation and Cultural Interpretation.

---



## Culinary After Dark

Newcastle's CBD and retail precincts have a burgeoning food scene, supported by a diverse range of cafes, restaurants and food experiences, a growing number of which are focused on local produce and producers, and/or provide a range of health-focused options. Locations within Newcastle with a high number of cafes and restaurants include the harbour and waterfront, Hunter Street and King Street in Newcastle CBD and Darby Street in Cooks Hill.

The piloted Newcastle lockout laws (which have since been repealed in areas such as Sydney), were identified as having reduced alcohol-fuelled violence, but also contributed to a noticeable decline in the night-time economy of Newcastle.

Whilst there are signs of recovery, the lockout laws continue to influence the potential growth of Newcastle's night-time experience, and a new evidence-based approach is required to better guide desired development types that will effectively support Newcastle's visitor economy.

Opportunities for improving the night-time economy and food and beverage offer across Newcastle, including investment in products and experiences and associated marketing include:

After Dark Strategy;

Development of a Live Music Pub Festival;

Development of Arts and Cultural Night-time Activations; and

Development of summer night-time activation.





## Supplementary Retail and Professional Services

As a large regional city, Newcastle provides a range of retail and services for the city and surrounding region including:

Higher order retail centres (such as Westfield Kotara), boutique shopping precincts such as Darby Street, and regular markets;

Medical, beauty and wellness services; and

Education providers (such as University of Newcastle and TAFE NSW).

The University in particular has a key role to play in developing the visitor economy, with a continued dedication to activating the city centre of Newcastle through ongoing campus developments, as well as its existing tourism course program and corresponding research, placement and graduate opportunities and outcomes.

It also attracts both business and VFR travel to the city, attracting visiting academics as well as friends and family of students.

Although the COVID19 pandemic will affect short term growth in enrollments, historic data prior to the pandemic shows significant growth occurring in international student enrollments. This should provide confidence that there will be the opportunity to grow Newcastle's international visitation and market presence in collaboration with the University as international travel services return to normal.





## Events and Event Facilities

A total of 29 'tourism' events were identified within Newcastle and surrounds, which includes those that attract visitation from outside of Newcastle and/or appeal to those visiting Newcastle.

Signature events for Newcastle include Surfest, Supercars Newcastle 500, and Port to Port. There are an additional 53 events that were identified that are currently targeted to the community market.

Some of these could be further enhanced and developed to attract a broader visitor market.

Newcastle has a range of events spaces, including those that service major events, exhibitions and festivals, as well as those that primarily service the corporate conferencing/small meetings sector, with a number of these managed by the City of Newcastle. It is crucial that these sites and facilities are flexible, multipurpose spaces that meet diverse needs and expectations of the events market and have the capacity to cater for sports, festivals and other entertainment offerings.

The ability to attract larger-scale conferences was identified as a key issue limiting growth of Newcastle's Meetings, Incentives, Conferences and Events (MICE) sector, with current major event spaces such as the NEX limited by either capacity and/or quality to deliver events of scale.

Similar to Geelong, with development of a large-scale conference facility, preferably positioned on the waterfront to take advantage of the coastal location, Newcastle has the ability to

develop a competitive advantage in being a destination of choice for mid-to-large-scale conference operators due to the mix of existing (and proposed) accommodation options, good transport network and accessibility through Newcastle Airport, compact diversity of amenities and services, and proximity to other signature product experiences in surrounding destinations.

Newcastle is well positioned to leverage business event opportunities through the University of Newcastle, HMRI and CSIRO. In addition to updating the existing Events Strategy, opportunities for growing the events sector include investment in large-scale facilities and improvement of existing venues, including:

Broadmeadow Sport and Entertainment Precinct;

Waterfront Convention and Exhibition Facility;

Expand and Enhance Existing Conference Venues (NEX and City Hall);

Public Space Policy Review; and

Infrastructure Improvement to Open Air Event Venues.

Opportunities for product and experience development within events include:

Attraction of Large Scale Multi-day Sports Events; and

Attraction and Development of Events that are aligned to Newcastle's experience pillars.

## Accommodation

A total of 680 accommodation properties were identified for Newcastle, including 93 commercial properties (14% of total venues), and 587 non-commercial (Airbnb/Homeaway) properties (86% of total venues). This includes the following three new five-star venues that are currently proposed/underway:

Little National Hotel by Domagroup to be built on Honeysuckle Drive in the CBD offering 152 rooms;

Kingsley by Crystalbrook to be built on King Street in the CBD offering 136 rooms; and

QT Newcastle by QT Hotels to be built on Perkins Street in the CBD offering 160 rooms.

## Accommodation Typology

Across the commercial accommodation sector, Motels/Private Hotels/Guest Houses made up the largest share of establishments with 37 or 40% of establishments, followed by Serviced Apartments (26 or 28% of establishments).

Opportunities for improving capacity across Newcastle's accommodation sector, include the following infrastructure and enabling projects:

Stockton Tourist Park Enhancement;

Self-Contained Accommodation Development; and

An Accommodation Audit and Accommodation and Product Investment Prospectus to strategically guide future accommodation investment.

## Transport, Infrastructure and Access

Newcastle is easily accessed from Sydney via the M1, and the Pacific Highway from the north, with intercity train services operating regularly from Newcastle Interchange to Sydney and Broadmeadow to Brisbane. Access to Newcastle through the Western Corridor is also important. Light rail services commenced operation within the city in February 2019 as part of the Revitalising Newcastle program delivered by Transport for NSW, which saw the removal of heavy gauge rail line from the city centre and harbourfront.

Newcastle also has a significant amount of active transport, including walking and cycling paths, Bathers Way, Fernleigh Track, Newcastle Town Walk, the Broadmeadow to Newcastle West cycleway and a cycleway between the City Centre and university campus in Waratah. In total, there are more than 900km of cycleways in Greater Newcastle (includes City of Newcastle, Lake Macquarie City Council, Maitland City Council and Cessnock City Council). An additional 287km of off-road paths are planned across Greater Newcastle.

Opportunities for improving connectivity and capacity across Newcastle's transport network include the following infrastructure and enabling projects:

Cruise Industry Plan;

Newcastle Airport Expansion;

Visitor Transport and Connectivity Review; and

Broadmeadow Light Rail Extension.





## Discussion

There is significant opportunity to increase visitor yield from signature assets and attractions through the development of bookable contemporary products and experiences, particularly across nature-based, arts, culture and history.

Investment in product and experience development should be targeted towards projects and initiatives that will help to establish a strong identity and brand profile for Newcastle and increase market awareness, as well as drive motivation amongst identified target markets.

Industry fragmentation and lack of communication and collaboration has also resulted in a lack of packaged products and experiences that are easily marketable, and that connect Newcastle to the surrounding regions.

The recent and ongoing significant investment in the accommodation sector perfectly positions Newcastle to effectively service and support future investment in product and experience development.

Although recent work by City of Newcastle has seen improvements in Aboriginal storytelling within the city, Newcastle's significant Aboriginal history is still not well recognised or promoted within current products and experiences available in the city. Significant sites of Aboriginal heritage should be explored in collaboration with the local traditional owner community to determine potential opportunities for sensitive tourism development. Support of the ongoing program of collaboration between traditional custodians and Newcastle Museum should be supported to enhance offerings within the current market. The new City of Newcastle VIC is an example of incorporating indigenous heritage.

The city currently lacks key facilities that are needed to support a city of its size and drive growth in the events space. These include provision of high quality conference spaces to support the business and conferencing sector, as well as a dedicated sport and entertainment precinct of significance that would support the attraction of large-scale regional events.

The development of events, festivals and conferencing should be guided by a dedicated events strategy, which includes a robust audit of existing events, as well as spaces, operators and resources that support the events sector to determine key opportunities for growth.

The Newcastle Airport and Port of Newcastle are major infrastructure assets that provide a competitive advantage for travel and access to Newcastle, however both require strategic investment to ensure they have the capacity to service future growth of the Newcastle visitor economy.

### Key Challenges and Opportunities

Lack of bookable product;

Undiscovered stories and heritage to be built on;

Opportunity for interpretation and activation of existing heritage and cultural assets;

Signature assets require enhancement;

Enhancement of the night-time economy;

Packaging and promotion of existing assets;

Investment in event facilities to attract events and drive visitation growth;

Key arrival visitor infrastructure requires better connectivity and access (airport, port, and ferry);

Development of accommodation to service known typology gaps and support key target markets – e.g. self-contained (adult couple leisure market/family market); and

Enhancement of existing accommodation.



# Markets and Positioning



**Key Leisure Market Audiences**

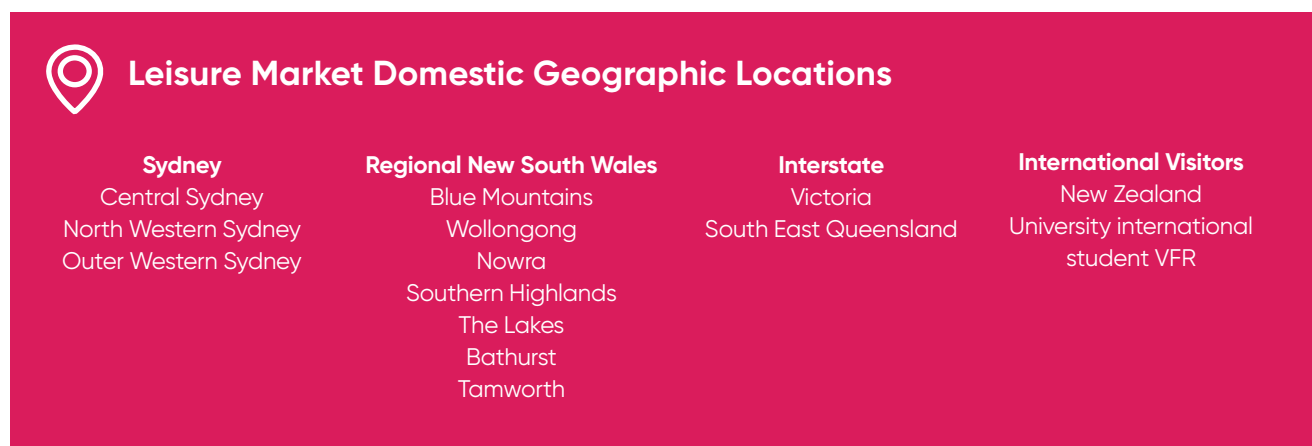
Audience Focus	Community	Personas	wc	V%	ix
Primary	Leading Lifestyles	Social progressives	33	10.50	326
		Bluechip	23	7.60	186
		Humanitarians	19	6.20	287
		Visible Success	19	6.10	263
Secondary	Heart and Home	Traditional Values	19	6.00	260
	Metrotechs	High Life	16	5.00	358

**wc:** weighted count ie 16 = 16,000 people of the 310,000 potential in our target audience.

**V%:** % of vertical i.e. 5% = 16,000 expressed as a percentage of the potential.

**ix:** index, compared to the total population in NSW. Anything above an index of 120 is judged to be significant.

Source: Roy Morgan Helix Personas, June 2020.



Using demographic and psychographic research and aligning this to Newcastle's experience pillars, target audiences that are most likely to view Newcastle as a compelling leisure destination have been identified. The personas that make up the target audiences define the type of people that are likely to be attracted to Newcastle.

## Primary Domestic Leisure Audience

### Leading Lifestyles

High income, highly educated, progressive and success and career focused people in the Leading Lifestyles Community enjoy sophisticated city living to the max.

From eating out and soaking up the cultural life of their city to indulging in their passion for international travel, Leading Lifestylers are truly living the good life.

They've worked hard for their success and place value on demonstrating their status and achievements to the world.

However, they also care passionately about the big issues that affect society at large and those less fortunate than themselves.

#### **Our audiences in this community:**

Social progressives, Bluechip, Humanitarians, Visible success.

#### **Social Progressives**

While a strong social conscience defines this persona's mindset, it certainly doesn't diminish their desire to display their achievements and indulge their passion for the best of big city living.

A mix of young singles and couples, and mid-life households, you'll find this highly progressive, civic-minded persona living in inner city areas of Sydney and Melbourne. They're also wealthy – almost half fall into the AB Socio Economic Quintile. With all of that spare cash it's not surprising that they're also big spenders. You'll also find many technology early adopters among them.

Amongst the most intellectual and progressive of the Leading Lifestyles Community, this persona is likely left-leaning and passionate about social issues and the environment.

People who belong to this persona are driven by a desire for an exciting life. They embrace change and are always on the hunt for new things and ideas and love overseas travel.

A strong sense of curiosity about the world drives high engagement with news and current affairs, particularly with the ABC. Not surprisingly, you won't find many watching commercial TV on a weeknight. As heavy internet users, they're more likely reading the business or global news section of the newspaper on their phones instead.

They also find time for sport and exercise in their busy lives.

#### **Bluechips**

Highly educated and cultured, Bluechips enjoy the kind of privileged lifestyle envied by the average Australian. Boasting the highest income and highest proportion of home ownership in the Leading Lifestyles Community, Bluechips spend big on their heart's desires, from home interiors to season theatre tickets and meals at the best restaurants.

They aren't shy about displaying their achievements but at the same time are also highly socially aware; they believe in social equality and care about the plight of those suffering social disadvantage. They also care about the environment and they are likely to keep an eye on how the government is managing the economy.

Culturally homogenous – most are Australian born, with a small proportion from the UK – half of this persona is located in Sydney, along with smaller clusters in Melbourne, Brisbane and Perth.

Bluechips are likely to be married and around a third have children under 16 living at home. Overall, the persona is comprised of a mix of mid-life families, mid-life households and older households.



Despite juggling demanding jobs and busy social lives, Bluechips still find the time to be highly engaged in the world via the arts and culture.

They are also big consumers of a broad range of media, particularly on the ABC and SBS – from news and current affairs through to business and lifestyle content.

They are also highly techy, boasting a high proportion of Early Adopters. You'll find many working in finance, business and property, with a significant proportion of professionals and managers among them.

### Humanitarians

Humanitarians are high income professionals – many employed in the public service or self-employed. They are also highly digital – you'll find many technology early adopters among them – and they embrace the full suite of social channels. All this time spent online also means they are likely to skip commercial TV altogether. Highly educated and cultured, they embrace the best of city living but do so with a solid social conscience.

The majority are Australian-born. You'll find them living in metro areas of Australia, clustered most significantly in Melbourne, followed by smaller clusters in Sydney and Brisbane, where they live mostly in separate houses with the rest mainly in townhouses and semis.

You'll find many mid-life householders in this persona, along with young parents and young singles.

Highly educated, progressive and very socially aware, this persona cares passionately about the world and the big issues that affect people's lives. Health and wellbeing are also high on the priority list for this persona.

People who belong to this persona are optimistic and consider themselves to be intellectuals, and are stimulated by new ideas. They love new experiences and are committed to making a difference in life. A desire for an important and exciting life drives them.

They're big spenders and prioritise spending on experiences rather than material wealth. They are highly social and love culture, so on the weekends you'll find them packing out cafes in between catching the latest theatre and art shows, movies and public lectures, or holding a dinner party at home with friends and enjoying a nice bottle of wine.

### Visible Success

People who belong to the Visible Success persona are focused on achievement and are very family orientated. You'll find many young parents and mid-life families among them.

The majority live in metro areas of Australia, clustered most significantly in Melbourne, Sydney, Brisbane and Perth. Most are Australian born, along with a small proportion from the UK. Almost all of the people who belong to this persona live in separate houses, although more than a half are still paying a mortgage.

Two incomes drive these high-earning households, where about half have a university degree.

They are big spenders and prefer to stick to their favourite brands. However, they also love to hunt down a bargain and sift through catalogues to save on everyday essentials.

Technology is also a priority – you'll find many early adopters among them.

When it comes to mindset, they are less likely to be socially aware than their Community peers and tend to worry about the pace of change and hold conservative views when it comes to social issues. Family and the desire for security are the key life goals for this persona.

### Hearth and Home

High income, highly educated, progressive and closest to the average Australian, life revolves around the home for these contented families and empty nesters.

They are heavily invested in their homes, financially and emotionally, seeing them as an expression of their status and achievements.

Perennial 'tinkerers' and home improvers, they also love nature and the outdoors.

**Our audience in this community:** Traditional values

### Traditional Values

Life revolves around the home for Traditional Values, and they see their homes as an important symbol of their status and achievements. Home improvement is a passion and a past-time, you'll find many wandering the aisles of hardware stores on weekends, picking up supplies for their latest DIY project, big renovation and general tinkering around the house.

Traditional Values are house proud and conservative-minded older Australians. One in three are aged 65+ and already retired.

You'll find most living in regional New South Wales in Newcastle, South Coastal area and the North Eastern part of the state, and on the Sunshine Coast in Queensland. Most are married.

A very high proportion own their homes outright, giving them a strong sense of financial security.

When they're not working around the house, leisure time is likely taken up watching commercial TV and perusing catalogues to make savings on the weekly shop, along with a regular meal at the local pub or club.

The great majority are Australian born. They are also better educated than some of their community peers.

When it comes to mindset, people who belong to the Traditional Values persona are likely to hold conservative values – indeed come election time you'll find many voting Liberal and One Nation at the ballot box.

## Metrotech

High income, highly educated, progressive and socially aware, hardworking, ambitious and culturally diverse. Introducing the Metrotech.

Their swanky rented apartments could be straight out of a premium beer commercial, while their action-packed social schedules are almost as demanding as their day jobs. No wonder Metrotechs take such good care of their health, exercising regularly – how else could they keep up the pace? Sure, they plan to settle down and buy their own place one day, but there's plenty of time for that later. For now, they just want to enjoy the freedom that their upward mobility brings: the overseas travel, the fancy restaurants, the designer clothes, the techie toys. You could say they're a marketer's dream.

Unsurprisingly, Metrotechs don't have much time to watch TV, but when they do, they steer clear of commercial channels. While you'll find Metrotechs packed with young singles and couples, you'll also find some 'young minded' midlife and older households among them, who embrace cultured city living to the max. They are also the most

culturally diverse of all the Helix communities – one in four was born in Asia.

**Our audience in this community:** High life

## High Life

High Life distinguish themselves from their peers in their love of big city nightlife – you'll find them hitting the nightclubs, bars and pubs in the evenings with gusto wearing new outfits, boasting another of their passions – fashion.

High Life are highly techy, culture and nightlife loving young singles and couples, living in Melbourne and Sydney, along with smaller clusters in Brisbane and Perth. Around one third live in shared households and a quarter are still studying.

Almost half are renters, living in a mix of apartments and houses, close to the city's entertainment centre and nightlife. Most are Australian born, along with a significant proportion born in Asia, the UK and New Zealand. A significant proportion work in the public service.

They are highly techy – you'll find many early adopters among them and they are heavy internet users; they don't hesitate to update their devices and gadgets.

Like their Metrotech peers, High Life are highly educated, socially aware and optimistic. They are stimulated by new experiences and big ideas.

When it comes to attitudes to social issues, you'll find High Life sitting firmly left of centre; they care about issues that affect society at large and place great value on the protection of personal freedoms.



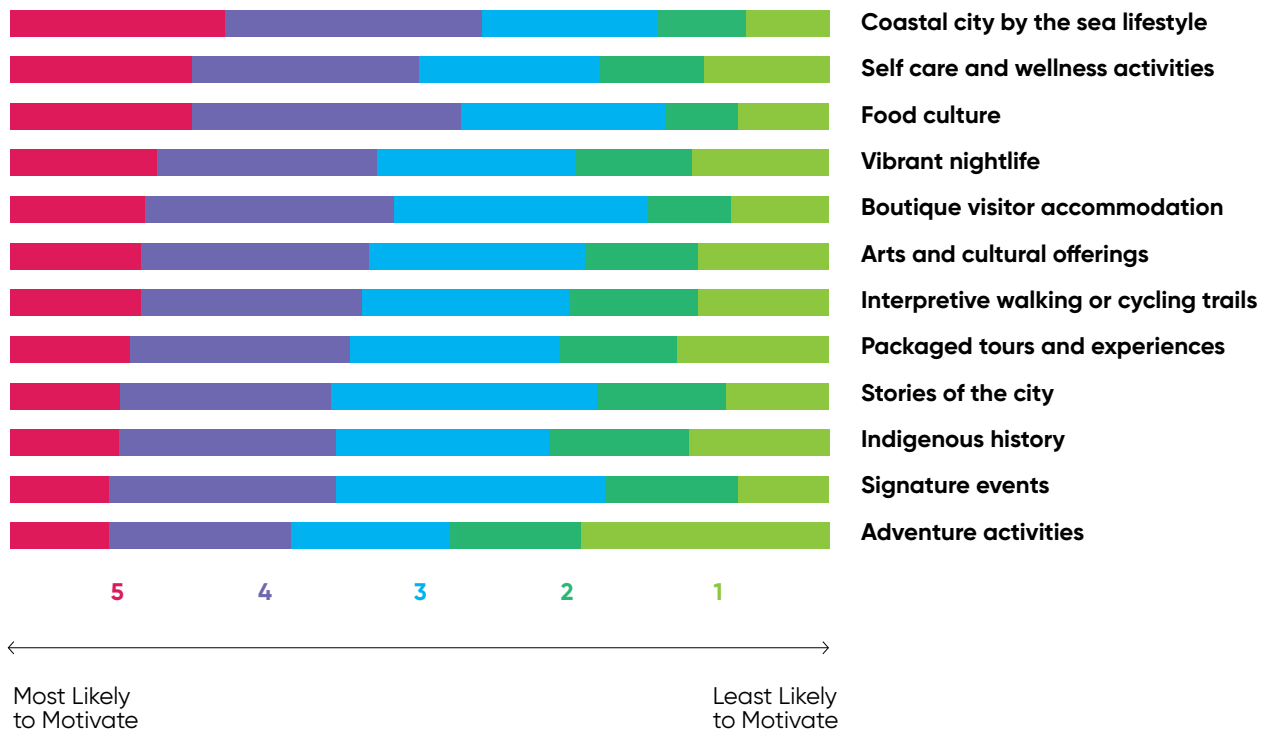
## Competitive Advantage and Unique Selling Proposition (USP)

Market research undertaken by Urban Enterprise, and complemented by City of Newcastle’s research showed that Newcastle’s identity is strongly linked to the city by the coast experience. This was demonstrated through:

The coastal aspects of Newcastle (eg beaches, swimming, sea) and ‘city-based’ experiences (eg food and wine; shopping; nightlife) both featuring strongly in what respondents identified as the activities and attractions associated with Newcastle, and in the identification of what made Newcastle unique.

As well as a strong association with the coast, Urban Enterprise’s market research study also found that there is significant opportunity for Newcastle to leverage itself as a hub of the Hunter Region, with respondents strongly associating Newcastle with the wider Hunter Region. This included a strong correlation between those who were primarily visiting the Hunter Valley but also visiting Newcastle during their trip and in the perception of activities and attractions/unique features of Newcastle also being associated with ‘wine’ through the city’s proximity to the Hunter Valley.

### Motivation for Visit



## Discussion

Analysis of existing visitor servicing and marketing for Newcastle, consultation findings, and market research studies conducted demonstrate that Newcastle currently lacks a clear identity to drive marketing and promotion activities to build awareness of what the city has to offer, including information to service potential visitors (pre trip) and those already visiting the region (during trip).

There is currently a limited sense of arrival into Newcastle for visitors, including those arriving via Newcastle Airport, which misses a key opportunity to establish an identity for the city, and capture transient visitors. There is also a lack of wayfinding signage within Newcastle to surrounding key visitor assets (eg Newcastle Airport), as well as limited translation of the city's 'precincts' (as communicated through City of Newcastle's digital and printed visitor collateral) into the public realm of the city, which misses a key placemaking opportunity.

Market research findings within both Urban Enterprise's and Think! X Innovations studies strongly align. Both studies highlight that Newcastle's unique competitive advantage is a combination of the following products and attributes:

Proximity of the city centre to surf beaches;

Strength of arts and heritage product in a coastal setting;

Night-time Economy;

Compactness and walkability of Newcastle; and

Mixing with, and 'laidback' friendly approach of locals.

As well as a strong association with the coast, Urban Enterprise's market research study also found that there is significant opportunity for Newcastle to leverage itself as a hub of the Hunter Region.

Results within Destination Think's Tourism Sentiment Index also highlighted that whilst online perception and conversations relating to Newcastle were unique, the volume of conversations was significantly less than other comparison cities, highlighting that identity and awareness is a key issue.

Development of a clear brand identity and marketing position that builds on the work already completed will provide a framework for targeted product and experience development and marketing initiatives. A solid digital strategy is also required.



[newcastle.nsw.gov.au](http://newcastle.nsw.gov.au)