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Destination Port Stephens
Destination Management Plan 2014

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The Destination

PREFACE

The Destination Management Plan (DMP) for Port Stephens has been undertaken with the primary aim of developing a strategic direction for the Port Stephens Local Government Area (LGA) as a destination to 2020.

The DMP is founded on the principle of *Shared Value* to create and foster the destination visitor economy partnerships between community, industry and government stakeholders. It seeks to find ways that businesses and the community can complement each other while developing strategies to propel Port Stephens towards the 2020 goal of doubling visitor yield.

It is the belief of the author that the DMP should not be at the margin of what businesses do but rather be in the centre of what they do: much like ecotourism seeks to complement the physical, social and cultural environments.

The DMP acknowledges from the outset that the visitor economy is not a perfect industry. Like all industries it has benefits and costs. The aim is to maximise the benefits and reduce the costs to extract the maximum net economic, social, environmental, and cultural and community benefits value.

The process of developing the DMP has adhered to principles of best practice including extensive consultation with stakeholders, including industry representatives, the business community, government agencies, academics, community organisations and residents. In addition, comprehensive audits, literature reviews, statistical analysis and research has been undertaken as well as recognition of existing strategies and reports such as the Jenny Rand Report, the Roger Stephan restructuring report, the PSTL Strategic Plan and the Nelson Bay Foreshore Strategy.

The approach for this plan was to consolidate previous work, update where necessary, and analyse tourism in terms of a visitor economy from a purely LGA perspective. The visitor economy has been approached in a broad context, which recognises the location, the people, community, and businesses in order to collectively come up with a Destination Management Plan to effectively manage the destination.

There is an apparent paradox in tackling the project at a political boundary or LGA level when the findings of the Visitor Economy Taskforce (VET) indicated the need to reject traditional boundaries and focus on destinations as perceived by consumers. This view is addressed by the need to have a starting point and with the mindset of openness and honesty regarding findings and recommended strategies. As such, it was envisaged from the outset that different strategies may well apply to different parts of Port Stephens and this has indeed been the case.

Destination Management is an on-going process and one where collaboration between the industry, government and the community is required. Stakeholders must take a collaborative approach to developing and marketing the destination and consider the best processes relevant to the destination, the people involved in the destination and the product on offer – all determined by the needs and expectations of those who will visit Port Stephens.

The key recommendations and actions developed in this plan aim to provide a road map for Destination Port Stephens, Port Stephens Council, businesses, stakeholder organisations and residents to build a strong and vibrant visitor economy.



EXECUTIVE SUMMARY

The NSW Visitor Economy Taskforce report recommendations have been taken up by the board of Destination Port Stephens who have committed to supporting the tourism industry to meet the challenge of increasing the economic value of tourism by doubling visitor yield by 2020. The goal to increase visitor yield within the short to medium term period will be informed by the DMP to the growth of a sustainable local economy within a vibrant community engaged with tourism either directly or indirectly.

Port Stephens has a proven track record of applied best practice as a leading regional tourism destination in New South Wales. The LGA has a strong and mature tourism industry with significant community support to lead new opportunities within evolving challenges including the increase in competitive environments and tourism growth inhibitors.

The destination is well regarded in the industry and has been a strong and very successful participant in the domestic and international tourism markets for many years.

Despite on-going challenges, Destination Port Stephens remains an innovative organisation, which has a proven history of adapting to and providing leadership in a dynamic and changing industry.

To effectively respond to and leverage opportunities and to meet anticipated challenges, Destination Port Stephens has elected to enthusiastically embrace the philosophy and practices of Destination Management Planning to allow a comprehensive approach to the local Visitor Economy and its integration into the fabric of the local community.

Destination Port Stephens has also adopted the *Pathways to Sustainable Tourism* approach developed by Econetwork. This approach seeks to create a basis for sustainable tourism by ensuring a strategy for the long-term conservation of Port Stephens' unique natural assets on which tourism largely depends.

Critical to the long-term success of the DMP will be the success of continuing to build brand awareness of Port Stephens as a *destination of choice* with products mapped to market preferences and delivered in a cultural framework of customer service excellence.

The central tenets that underpin the DMP include

- Protect, cultivate and capitalise on the destination brand and identity
- Encourage greater industry ownership for responsibility of growth and direction of the visitor economy
- Support of government agencies as contributing partners in the design of product innovations
- Foster strong leadership facilitated through a self-supporting resourced corporate structure
- Recognise the importance of partnerships and open communication with local business associations, organisations and residents to drive tourism development
- Increase diversity of product and service offerings promoting uniqueness of destination for both host community and visitors
- Strengthen linkages with Tourism Generating Regions (TGRs) domestic and international operators to increase visitation.
- Recognise the value, diversity and life-cycle stage from established to new tourism products and providers across the region attracting a range of target markets
- Collaborate with geographical boundary destination competitors to secure repeat visitation and develop multi-destination products within Port Stephens destination branding
- Increase collective awareness that tourism development is reliant on collaboration and partnership arrangements.

The strategic recommendations in this plan have been broken down into 3 key areas;

- Destination Development
- Destination Management
- Destination Marketing

Together, these key areas are designed to allow Port Stephens to embrace and benefit from the visitor economy under the key strategic directions:

- Products and Experiences
- Service quality and standards
- Visitor Servicing
- The community



- Strategic Leadership
- Corporate Structure
- Infrastructure development
- Sustainable development
- Transport
- Research and Measurement
- Branding
- Domestic Marketing
- International Marketing
- Business Tourism
- Digital Innovation

THE DESTINATION

Port Stephens covers an area of 979km² which extends from Karuah in the north to Tomago / Fern Bay in the south and out to Woodville and Duns Creek in the west. The major areas within the LGA are the Tomaree and Tilligerry Peninsulas, Raymond Terrace and the Pacific Highway corridor, western Port Stephens and central southern areas from Salt Ash to Williamtown and Tomago. From a tourism perspective, the main area that currently attract visitation and offer the majority of tourism infrastructure and services is the Tomaree Peninsula and to a lesser degree, the Tilligerry Peninsula and the area west to Williamtown.

Port Stephens is a sophisticated tourism destination, with established product and experiences; the area has long been a popular place for Sydneysiders heading north for short breaks or summer holidays. Tourism is the main activity on the Tomaree Peninsula and arguably the largest economic driver in the LGA. Tourism is important on the Tilligerry Peninsula however this area is a comparatively undeveloped natural environment compared with the Tomaree Peninsula. The areas along the Pacific Highway are more service oriented from a tourism perspective whilst the Williamtown and Salt Ash areas include the airport and a number of attractions and activities. West of the Pacific Highway is relatively undeveloped but has scope for product development.

Table 1 below gives a 'snapshot' of Port Stephens whilst Figure 1 identifies the areas and main industries throughout the region.

Population	64,807
Population Projection	Increase of 23,000 people over next 15 years
Climate (Avg yearly temp)	Max 22.6C Min 12.4C
Labour Force	28,378 (43.8% of the population)
Employment	24,856

Table 1: Snapshot of Port Stephens

The Port Stephens Economic Development Strategy (2007) found that the area has 4 main economies;

- Services and tourism employing around 4400
- Global manufacturing and logistics supplying an estimated 3700 jobs
- Defence and aviation with an estimated 3300 jobs
- Services which employs around 3000 people

Whilst accurate measures of the total economic benefit derived from the visitor economy are in all practical terms very difficult to obtain

- Tourism generally has a higher multiplier effect compared to other industries
- The less *tourism-oriented* localities of Port Stephens are important dormitory suburbs for people working in the industry (refer to 1996 TOPS employment survey)
- Port Stephens has significant visiting friends and relatives (VFR) segment given its coastal location near major population centres.



Tourism is often portrayed as a highly seasonal industry without real jobs. At this juncture it is worth noting that a Tourism Organisation of Port Stephens (TOPS) study carried out in 1997 revealed that the nature of much of the work suited many residents, especially mothers with families and *migratory youths* who followed the seasons with work in the snow fields or overseas. Whilst there are no more recent supporting studies, anecdotal evidence and employment records from some of the larger hotel and attraction businesses seem to support this notion. In terms of pay, tourism is on par with other service industries and in terms of career opportunities and progression; tourism provides more opportunities than most other sectors.

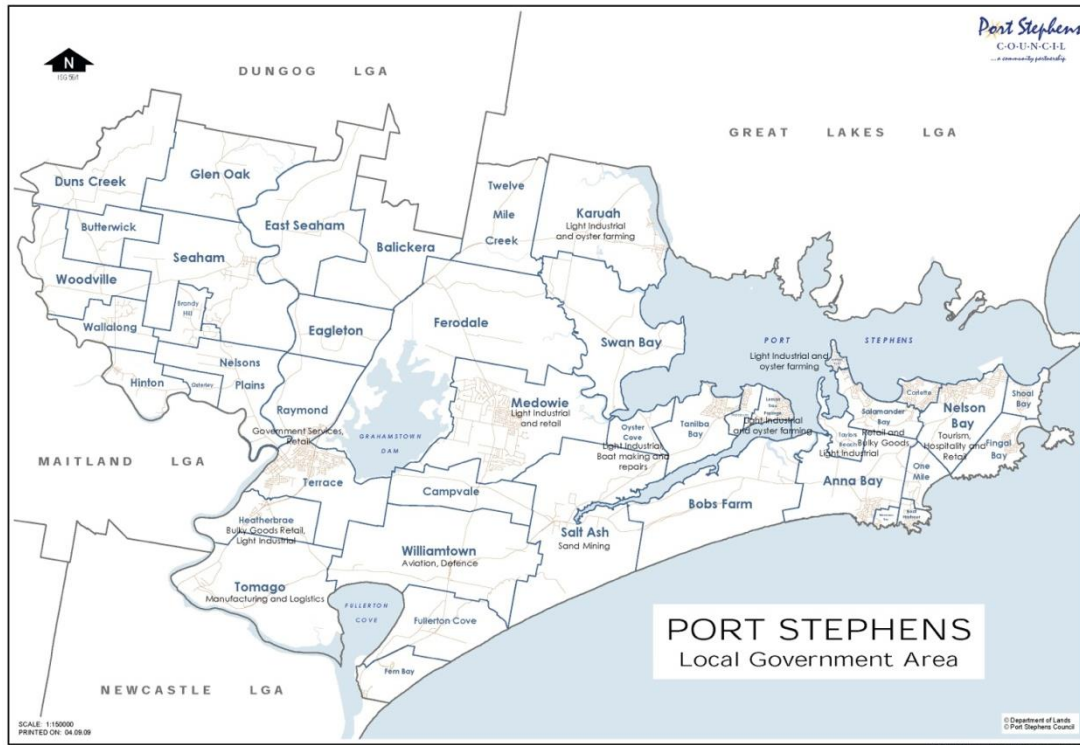


Figure 1: Port Stephens LGA show boundaries and major industries

STRUCTURE OF TOURISM IN PORT STEPHENS ORGANISATIONAL

Tourism marketing and servicing is enabled by two primary organisations, Port Stephens Tourism Ltd and Port Stephens Council.

Port Stephens Tourism Ltd trades under the business name of Destination Port Stephens(DPS). Incorporated in 1997, the company operates under member ownership. Membership is open to businesses and individuals who pay an annual membership fee. Historically, the role of the company has been to market Port Stephens LGA as a tourism destination with the objective to develop a thriving, sustainable, year round tourism industry.

Port Stephens Council (PSC) is a key partner with Destination Port Stephens members in supporting destination marketing and development. Port Stephens Visitor Information Centre (VIC) is located on Victoria Parade, Nelson Bay and is an accredited Level 1 operation. The VIC is owned and operated by PSC and is funded in part through the return of annual business rates. The VIC is the flagship enquiry centre for Port Stephens and is also the business operation location for a dedicated Event Management Team, responsible for facilitating and co-ordinating events.



RELATIONSHIPS

Destination Port Stephens fosters partnerships, business and community relationships with a range of public and private entities.

Destination Port Stephens maintains close co-operative networks with North Coast Destination Network (NCDN) and Visitor Economy Hunter (VEH) however has elected not to be a financial member of Regional Tourism Organisations (RTOs).

Key relationships include:

- Members: between 200 and 250 members depending on time of year
- Business Chambers: in Nelson Bay, Tilligerry and Raymond Terrace
- Port Stephens Council
- Residents
- Destination NSW
- Tourism Australia
- Surrounding Local Tourism Organisations (LTA's) / LGA's especially Newcastle, Hunter Valley Wine Country, Great Lakes, Gloucester
- Industry membership bodies such as TIC, ATEC, BCA, ARTN

RESOURCES

Funding for marketing activities comes from a mix of:

- Council funding via a CPI adjusted business levy at \$269,165 for 2013/14
- Provision of a Council employed Marketing Manager
- Membership fees
- Co-operative member campaign buy-in
- Visitor guide and map advertising
- Grants from Destination NSW
- Other grants such as from Department of Trade and Investment

The organisation had a total expenditure of around \$881,000 for 2012/2013, an income of \$834,000 and retained earnings of \$115,000 as at 30 June 2013.

The funding and working agreement with PSC is due to expire at the end of June 2014 however it is expected that an on-going agreement will be reached well prior to that time. With the new agreement, there may well be significant changes to the membership structure, funding and operation of the organisation.

Destination Port Stephens employs one full time Administration Manager and a part time Marketing Assistant to maintain the web site. In addition, contractors are used to maintain social media, the corporate web site and to implement campaigns and specialised groups such as MICE. As at the end of 2013, the organisation employs between 2 and 2.5 FTE staff in addition to the Marketing Manager funded by Council. Port Stephens Council employs 3 full time staff at the VIC supported by a small team of part time and casual staff. The events section employs an additional person. The Economic Development unit in Raymond Terrace employs 2 full time staff, excluding group and section Managers).

The VIC / Events Team have a budgeted expense of approximately \$535,000 which includes \$75,000 to support events in the region. This is offset by budgeted revenue of \$228,000 leaving Council with a net budgeted cost of approximately \$375,000.

VISITOR SERVICING

Visitor Information Centres (VIC's)

There are a number of accredited and unaccredited Information Centres around Port Stephens. Aurora Research manages the NSW Accredited Visitor Information Centre Network (AVIC) and provides accreditation at 3 levels, namely Levels 1, 2 and 3. Level 1 is the highest accreditation and has more onerous service and information delivery requirements. It is not compulsory to be accredited to run an information



centre however accreditation is necessary to use the trademarked logo.

The Nelson Bay Centre is accredited as a Level 1 owned and operated by Council staff and volunteers.

Visitation to the centre has been in consistent decline for many years with a particularly noticeable drop over the summer holiday period (See Figure 2). Directional signage to the Visitor Centre is extremely poor with a single small sign on a cluttered pole at the Church St / Stockton St roundabout and a single sign 100m prior to the VIC on Government Rd. Signage on the centre itself is quite prominent and clear and it is easily located by anyone visiting the waterfront area in Nelson Bay.

Parking at the centre is limited to 15 minutes with only 3 car spaces immediately out the front. There is ample paid parking in the vicinity however spots are difficult to secure during peak times.

The centre is open 364 days per year and provides after hours services via a 24 hour Datatrax machine (with limited local product) and a paper list of available accommodation with contact numbers is posted on the window each evening. There is no longer a supply of paper visitor guides or maps for after hours visitors. Revenues from accommodation and tour bookings are increasingly related to direct online bookings in the face of diminishing VIC sales. For 2012, direct online sales accounted for \$285,000 (up 144% on 2011) however growth and consolidation on mainstream competing booking engines will challenge this income stream over coming years.

Other visitor information centres in Port Stephens include:

- Raymond Terrace (unaccredited) operated by Port Stephens Council
- Karuah (Level 3) Run by Karuah Working Together
- Tanilba Bay (Level 3) Tilligerry Habitat
- Lemon Tree Passage (Level 3) LTP Newsagency
- Salamander (Level 3) Salamander Bottleshop.
- Bobs Farm (Level 3) The Palms Golf Course
- Newcastle Airport (unaccredited) run by the Airport
- National Parks and Wildlife, Nelson Bay (national and marine park info)

The main focus by staff at the Visitors Centre is on the provision of information, booking of tours and accommodation and retail sales. There is currently very limited cohesion or overall co-ordination between the various information centres within Port Stephens although there are plans to address this. The Nelson Bay Centre is the only one to actively utilise Book Easy. At this point in time there are no agency agreements set up with other information or booking centres, either inside Port Stephens or beyond, despite the system offering this functionality. Holiday lettings managed by real estate / booking agents are currently not being sold via Book Easy and this represents an additional funding opportunity.

There is currently no working relationship / (corporate or operational) between the Visitor Information Centres in the surrounding region, especially Newcastle, Maitland and Hunter Valley, however informal relationships appear to be growing, especially with Newcastle

Online Bookings

The VIC uses the Council owned Book Easy as their booking engine which is embedded into the Destination Port Stephens owned consumer web site, www.portstephens.org.au. Accommodation bookings at the VIC have also seen a significant decline whilst tour bookings remain relatively steady in dollar terms. Bookings for events assisted by the events team have risen since the formation of the unit however many of these bookings are managed outside the booking engine.

Digital Information

The main source of consumer / visitor information in digital form is the consumer site www.portstephens.org.au.

The site has been optimised for mobile devices which are capturing an increasing share of the digital market (46% of visits to the site) however a custom designed app to assist in *live* place information has not yet been developed. Social media is increasingly being used to communicate happenings and events however this also falls short of adequately meeting visitor's needs.



Other

Destination Port Stephens produces an annual Port Stephens Visitors Guide, which has been the main consumer information brochure for many years. It is distributed via

- Brochure racks around the LGA,
- To other information centres around the state
- Brochure racks throughout Sydney (via The Informed Tourist and The Word racks)
- Online
- In response to consumer enquiries at the Visitor Centres

2012 saw the production of a fold out map, which included all the CBD areas in the LGA and besides being a very useful map for visitors; it has served as a catalyst to improve relationships between businesses and associations in the various areas.

There is a distinct lack of layby / information bays in the LGA. Plans for a permanent display with an information kiosk (manned only during peak times) at Salt Ash were abandoned in 2003 however the road and toilet infrastructure are in place.

Port Stephens will receive their Legendary Pacific Coast Information Bay during 2014, which will aid people travelling along the Pacific Highway. See Figure 3 below:

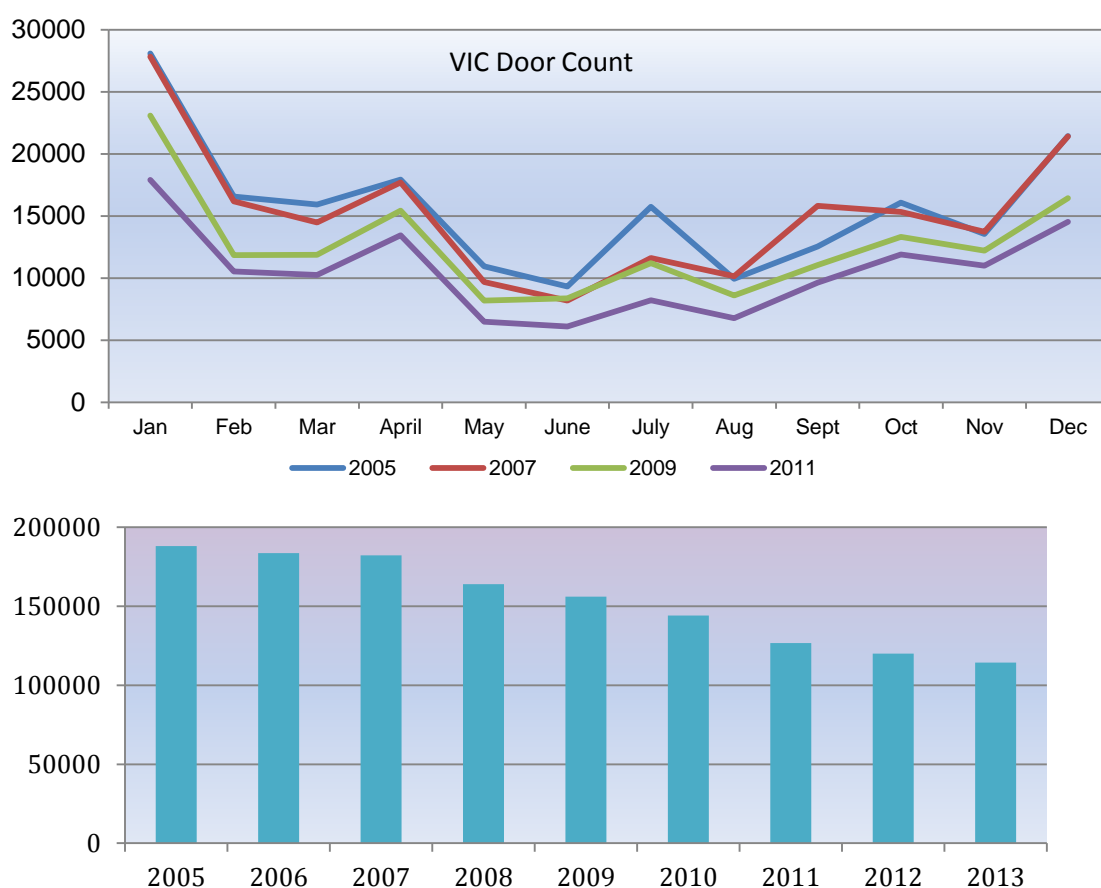


Figure 2: Yearly total door count for the Visitor Information Centre in Nelson Bay (2004/5 - 2011/12)



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Figure 3: TLPC Rest Area Information Bays

There are no general interpretative or information displays in the area. Old touring route markers are still in existence however, they are functionally unusable.

Interpretative signage is available at many points within Tomaree National Park and at Gan Gan Lookout. Other than this, the area lacks interpretative signage and visitors need to consult web sites or publications to understand significant locations, their meaning and/or history.

SIGNIFICANCE OF PORT STEPHENS AS A DESTINATION

The VET Report recommendations, the subsequent State Government adoption of the document (with a few amendments) and the resultant state funding to successfully develop the visitor economy, are predicated on the notion of developing and promoting areas that are “destinations” in the mind of the consumer. The previous approach of establishing “branded regions” has proven to be ineffectual in that the consumer themselves determine destinations. As such, it is important to establish how consumers view Port Stephens and in particular, to answer the question of whether Port Stephens is seen as a destination in it’s own right or if it is seen as part of a destination. There are a number of studies that can be drawn on to answer this question.

QUANTITATIVE RESEARCH

Brand Health Tracking (BHT)

Destination NSW commissioned an on-going study into the various brands of NSW destinations. (Annual sample of n=5500). It is important to note that of the sample population, Sydney, Melbourne and Brisbane account for 15% each, regional NSW, VIC, QLD and ACT each account for 10% and Adelaide, Perth and Hobart each account for 5%. The brand is thus measured well beyond NSW.

Key findings from the 2012 June quarter results include:

- 56% of all respondents think of Port Stephens as a place that they could go for a short break or getaway. (Consistent result over 3 quarters)
- Approximately 50% see Port Stephens as either “Extremely Enticing” or “Very Enticing” as a short break destination.
- Less than 15% answered “don’t know” when asked how enticing Port Stephens is as a holiday destination.

Hunter Valley Research Foundation (HVRF) Omnibus survey: 2000 and 2002

Port Stephens Council participated in 2 separate Sydney Omnibus surveys (2000 and 2002) conducted by Hunter Valley Research Foundation.

In the 2000 study with a sample of n=1,000, Sydney domiciled respondents aged 18 and up, were asked *Have you seen, read or heard about Port Stephens in the last 12 months?* 54.6% answered in the affirmative. The study also found that 51.1% of Sydney residents surveyed indicated that they had visited Port Stephens and of those, 46% had visited in the previous 2 years; 24.8% in the previous 2 to 5 years and



29.2% more than 5 years.

The follow up study in 2002 revealed that 58.7% of respondents indicated that they had visited Port Stephens. (This figure may possibly have been slightly higher than the 2000 result as it was a question asked after two other Port Stephens specific questions)

UTS undergraduate survey on short break holidays (Kim Trinh, 2012)

As part of a UTS final year undergraduate project supported by Port Stephens Tourism in 2012, a population of 177 Generation Y respondents were asked various views on holiday destinations and on Port Stephens. The unprompted question, *“Thinking of a short-break holiday within a 2-3 hour drive from Sydney, which are the first 5 destinations that come to mind? Please list.”* resulted in 12 mentions of Port Stephens as the first answer, equal in number to Wollongong. See Figure 4. When all destinations were analysed (5 destinations per respondent), the Blue Mountains had 46 mentions, Hunter Valley 42, Port Stephens 40 and Wollongong 39. This is broadly consistent with the Brand Health Tracking results. It is also worth noting that the Port Stephens result included 10 *“Nelson Bay”* responses and that all references to the Hunter were *“Hunter Valley”*.



Figure 4: 2012 UTS study, first answer results to the unprompted question 1 *“Thinking of a short-break holiday within a 2-3 hour drive from Sydney, which are the first 5 destinations that come to mind?”*

Yes	161	91%
No	16	9%
Total	177	100%

Table 2: 2012 UTS study results to the unprompted question 2 *“Have you heard of Port Stephens?”*

Port Stephens Beachside Holiday Park (PSBHP) study (2010)

In 2010, Port Stephens Beachside Holiday Parks conducted an online survey to investigate issues around branding their businesses. The survey was incentivised and advertised online via Google Ads, targeted mailing lists (Holidays with Kids). The initial part of the questionnaire focused on unprompted questions with the latter part zeroing in on specific holiday park issues. As part of this project, Port Stephens Tourism added the following branding question as the opening, unprompted question.

“Q. When thinking of a holiday or short break within a 3 hour drive or 2 hour flight from your home, name the destinations that come to mind. “

In all, 4446 responses were received and analysed. Of these, 2352 were from NSW and 1033 from Sydney.



The results are shown in figures 5 and 6, both Tag Clouds the larger the fonts equate to more responses that included that particular word.

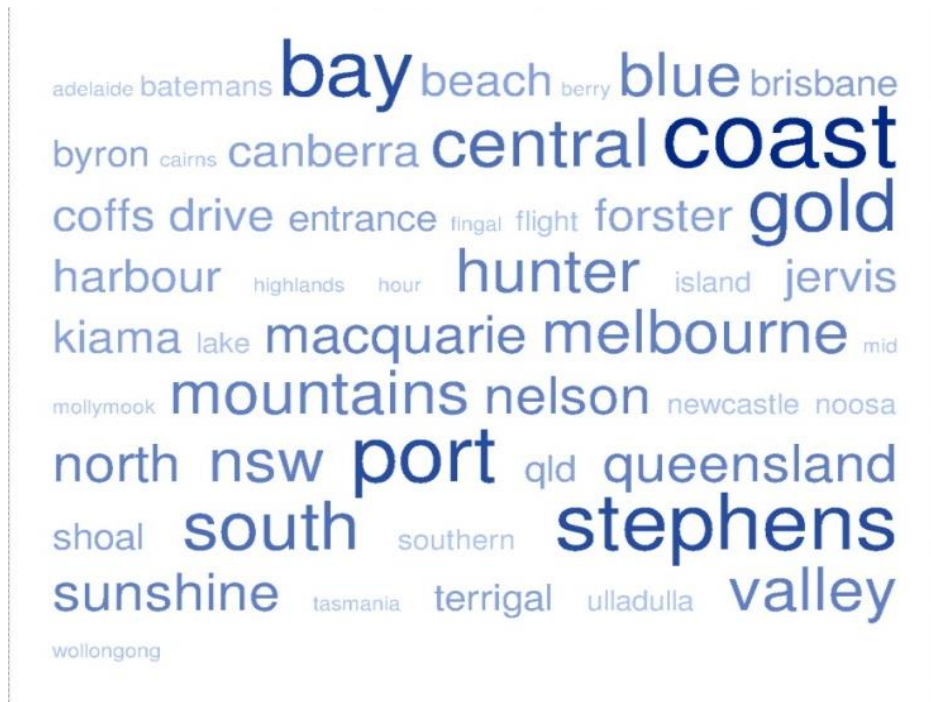


Figure 5: 2010 PSBH study: Question 1 results for 1033 Sydney respondents

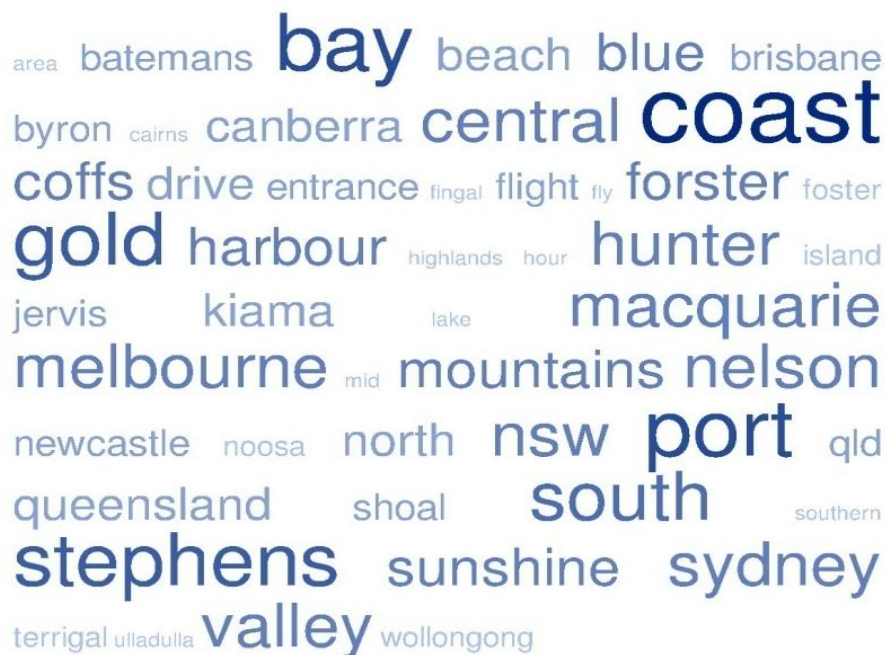


Figure 6: 2010 PSBH study: Question 1 results for 2352 NSW respondents

For the overall state result, Port Stephens was mentioned 634 times or in 27% of the total responses. From the Sydney respondents, Port Stephens scored 347 mentions or 33.6% of the responses. It is also worthy to note that:

- Nelson Bay has strong recognition 10 % of Sydney respondents and 9.5% of overall NSW respondents



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identifying the township.

- Shoal Bay was mentioned by 4% of the NSW respondents and 2.9% of overall state respondents.

Inclusion in International Travel Programs

Significant effort has been expended in developing Port Stephens as a destination for international travellers over the last 20 years. Whilst it is almost impossible to quantify perceptions of Port Stephens by travellers from other countries, a pseudo indicator is the presence of Port Stephens in the various travel itineraries / programs sold by travel agents. During the 2013 Australian Tourism Exchange, Destination Port Stephens had 82 appointments with travel buyers (excludes ITO's, media, airline GSA's, TA and DNSW staff, Australian based companies) of which 60 had Port Stephens included in at least one of their itineraries / packages. Of the other 22, some itineraries are unknown / not stated whilst others came for information on Port Stephens with the view to commencing inclusion.

All major Inbound Tour Operators (ITO's) sell Port Stephens as a branded destination and throughout the international travel industry, Port Stephens is commonly accepted as an independent destination which is sold standalone or as part of a multi destination itinerary.

QUALITATIVE RESEARCH

Perceptions of Air Travel to Newcastle and Regions: A Qualitative Study: (April 2005)

Undertaken by Roy Morgan Research on behalf of Tourism NSW (now Destination NSW), this qualitative research was based on interviews of eight focus groups; 4 in Melbourne, 2 in Geelong, 1 in Brisbane and 1 in the Gold Coast. Whilst the perceptions and analysis of the groups' comments are not in question, the use of the study for the purpose of understanding the destination is extremely limited and so of not much value. For the sake of completeness however, the study is mentioned in this plan.

The study did find that *"little is known about Port Stephens"*. However, "Port Stephens is not quite as well known as the Hunter Valley, although it was spontaneously mentioned as a tourism destination in NSW by 3 groups"

The real value of this research was as an insight into the types of holidays that could be developed to the region serviced by the airport and in determining this, the researchers had to describe destinations, attractions and activities to elicit responses. As such, the study contributes little to the understanding of the destination but does offer an insight to the nature of desired fly/ drive packaging.

CONCLUSIONS

The above studies clearly demonstrate that Port Stephens is seen as a stand-alone destination in the eyes of consumers, both domestically and internationally. There is some evidence that on the domestic front, Nelson Bay also retains a level of autonomous identification as a destination, possibly reflecting some confusion around the lack of a distinct town /locality of Port Stephens. Nelson Bay however does not rate significantly enough to warrant treatment as a destination in its own right rather it may indicate the need to work towards achieving greater clarity or understanding of the Port Stephens destination.

The above studies essentially quantify awareness of the destination however it is also important to understand exactly what and where consumers perceive the destination to be.

Anecdotal evidence from inquiries at the Visitor Centre suggests that consumers essentially see the Tomaree Peninsula townships and environs as Port Stephens. This may include the Williamstown / Salt Ash areas as well as Tilligerry Peninsula. In the majority of cases, the western and northern areas are excluded simply because of the limited product available in these areas. Furthermore, the 2002 HVRF study, approximately 41% of the responses identified localities on the Tomaree Peninsula as a *"town or location"* within Port Stephens whilst approximately 42% knew only of Port Stephens and couldn't name a specific town or location.

No branding analysis of the *"Hunter"* or *"North Coast"* regions needs to be undertaken as the above studies clearly show that these are not consumer destinations. Whilst they are undoubtedly strong brands in their own right and most probably have significant relevance in their respective local and regional settings, from



the outside visitor perspective they appear to essentially be administrative or geographical brands. The Sydney Surrounds branding was not investigated for similar reasons to the regional brands. It is however worthy of mention as this brand has been successfully used in International markets for many years and is especially useful for consumers who have no specific knowledge of the destinations surrounding Sydney. As a brand it capitalises on awareness of Sydney and serves to paint a useful picture of regional or beyond city experiences. As such, it will continue to serve as a powerful marketing tool for both establishing the destinations in 3 hours radius around Sydney in new markets and as a basis for co-operative campaigns as an umbrella brand.

The overall evidence is however very clear, Port Stephens is a well-known destination in the eyes of consumers.

ANALYSIS OF VISITORS

Given the location of Port Stephens relative to population centres and transport routes combined with spectacular natural assets and a relatively mature industry, tourism is a sizeable and significant economic driver in the LGA.

According to the National Visitor Survey (NVS) and International Visitor Survey (IVS) estimates, excluding the value of international day trips, tourism directly injected \$430 million into the local economy over 2012. This figure excludes the significant value of international day trips, which is not measured.

The Australian Bureau of Statistics surveys certain properties in an effort to quantify accommodation data. Unfortunately the measurement, whilst accurate in it's own right, is not consistent from year to year (dependent on government funding) and it variously ignores smaller properties. Nevertheless, the data is useful in helping to “*paint a picture*” of the local accommodation sector.

From the ABS data for Port Stephens:

- Holiday Parks have 2712 sites and had takings of \$17.815million (12 months to end June 2010)
- The 21 hotels /motels surveyed provide in excess of 1200 rooms and have takings of \$37.67million (2012 ABS)
- Hotel/Motel Average stay is 2.74 nights with an average room rate of \$151.52
- The 21 surveyed hotel/motels accounted for 534,385 guest nights with a quarterly occupancy that in 2012 varied between 48.5% (Q2) and 66.3% (Q1)
- Holiday Units accounted for 1217 units, 8066 bed spaces, and had occupancies that varied from 28.6% (Q3/2009) to 49.6% (Q1/2010)
- Holiday units were responsible for takings of \$22.439million with an average quarterly length of stay between 4.8 and 7.3 nights

Domestic

The National Visitor Survey provides a detailed breakdown of visitors to Port Stephens during 2012 and provides the most comprehensive and reliable data at this point in time.

For the calendar year 2012, Port Stephens recorded:

- 1.94 million visitor nights
- 640,000 visitor overnight trips
- 787,000 domestic day trips
- 414,000 Visiting Friends and Relatives (VFR) visitor nights
- Average length of stay of 2.74 nights for hotel/motel guests
- Average length of stay of 4.8-7.3 nights for holiday units
- Overall average length of stay of just over 3 nights

Age of our Visitors

The largest age group of visitors is the 45-64 year olds with 37% of the total followed by the 25-44 year olds with 35%



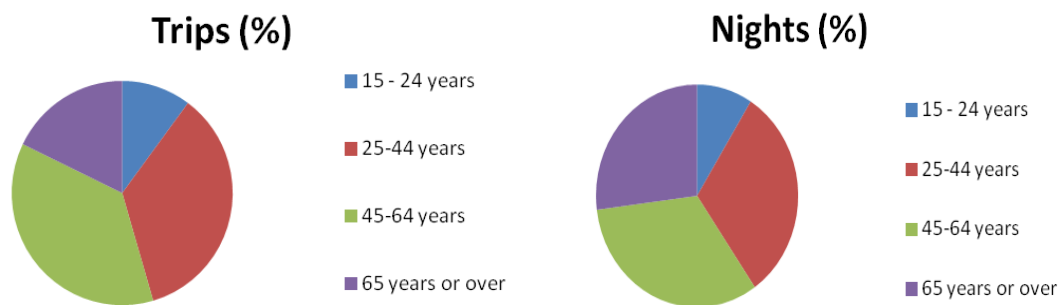


Figure 7: Age breakdown of visitors to Port Stephens 2012 (Source NVS)

Lifecycle

The “older non-working married person” group makes up the single largest single category with 21% of all trips however the three combined “parents” groups take the families to a total of 41%.

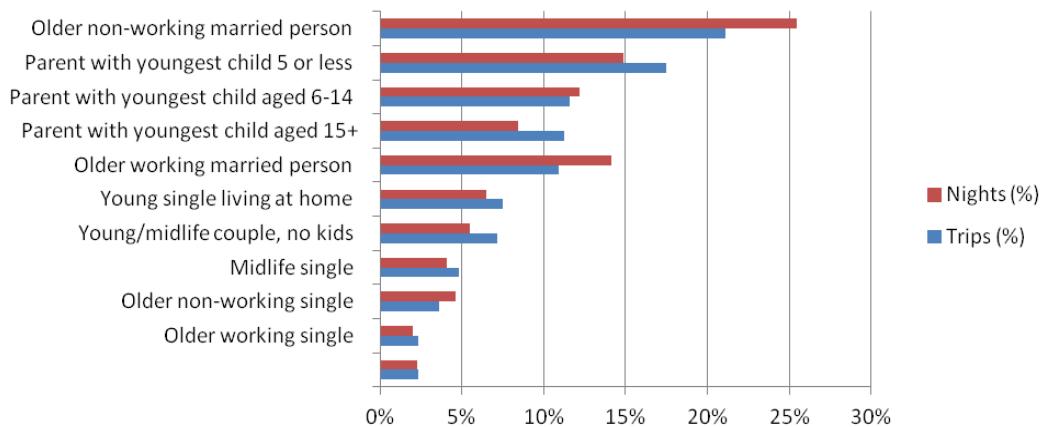


Figure 8: Lifecycle of visitors to Port Stephens 2012 (Source NVS)

Travel Party Composition

The 2 main travel party groupings are “adult couples” and “family” which appears to reflect the commonly held view that Port Stephens is a family destination during summer and school holidays but more adult short break during the lower seasons.

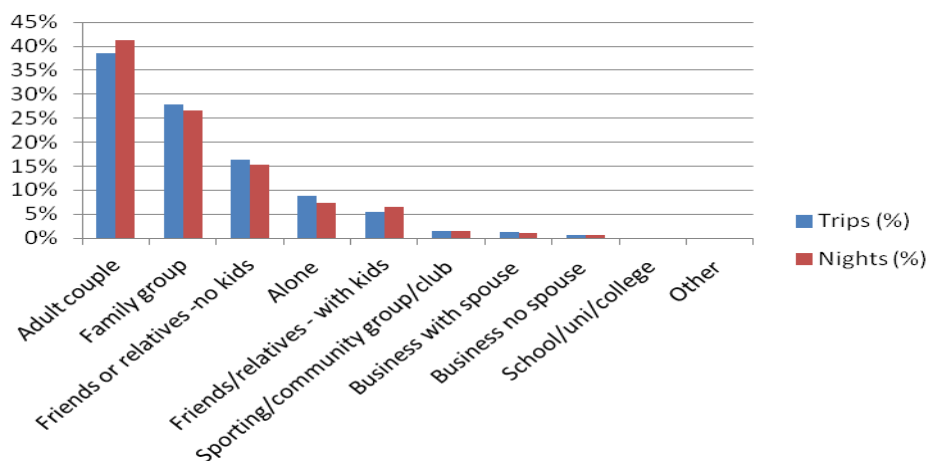


Figure 9: Travel party for visitors to Port Stephens 2012 (Source NVS)



Seasonality

In terms of “day of week” travel patterns, the NVS unsurprisingly shows Sunday to be the most common day of return from a visit. The relatively high figure for Monday (18%) may well reflect the fact that more people are making the most of the weekend and staying Sunday night.

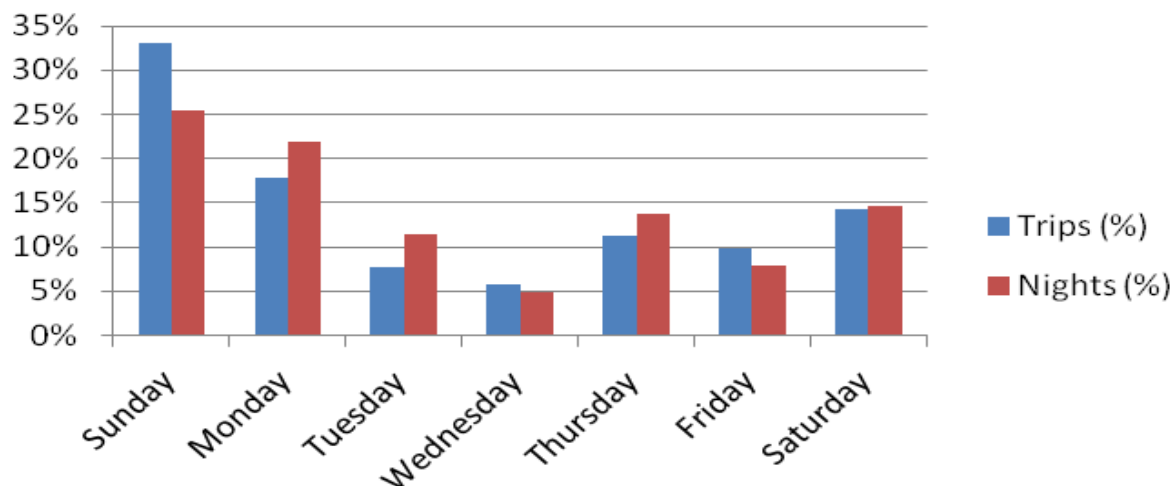


Figure 10: Day returned home for visitors to Port Stephens 2012 (Source NVS)

In terms of monthly travel patterns, January remains the peak season. The Easter holiday period is also popular however the strong November figure is also encouraging. Whilst tourism is still undoubtedly a seasonal industry, the lows traditionally experienced over the July to September period appear to have risen significantly reflecting the greater diversity of source markets (southern states and inbound over winter months), better product offering (especially whale watching) and marketing campaigns targeting this time of year.

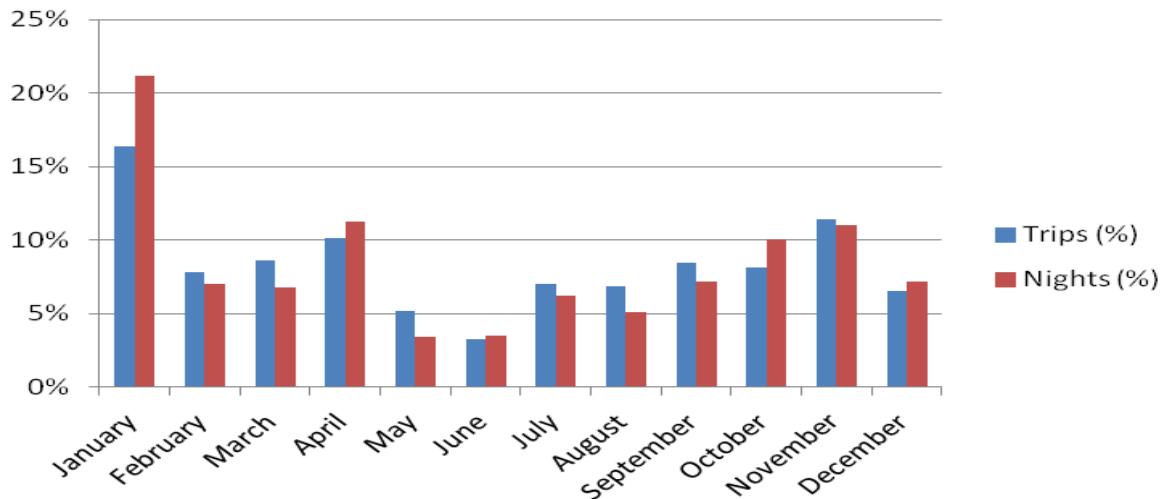


Figure 11: Month returned home for visitors to Port Stephens 2012 (Source NVS)

Overnight Domestic Source of Visitors

Again unsurprisingly, the greater Sydney region is the largest single source of visitation with NSW accounting for 91% of domestic visitors.



Trips (,000)

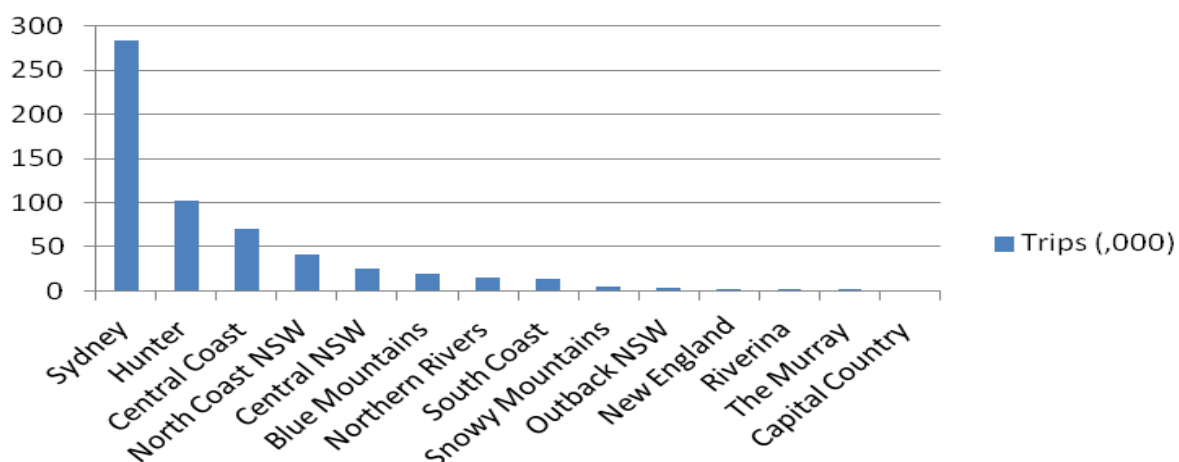


Figure 12: Regional source of NSW visitors to Port Stephens 2012 (Source NVS)

	Trips (,000)	%		Nights (,000)	%
State					
New South Wales	580	91%		1,752	90%
Victoria	28	4%		104	5%
Queensland	7	1%		18	1%
South Australia	3	0%		14	1%
Western Australia	7	1%		17	1%
Tasmania	3	0%		10	1%
Northern Territory	2	0%		4	0%
ACT	10	2%		21	1%
Total	640	100%		1,939	100%

Table 3: State source of visitors to Port Stephens 2012 (Source NVS)

Activities

Table 4 below lists the main activities undertaken by visitors to Port Stephens. (see Appendix 2 for full list) The research does not necessarily reflect motivations and does not include domestic day trips (data not collected). Anecdotal evidence and observation suggests that the area attracts many day trippers for the purpose of beach and sports such as surfing, scuba diving, golfing, fishing.

	Visits (,000)	%
All destination activities		
Eat out at restaurants	393	61%
Go to the beach (including swimming)	349	55%
Visit friends and relatives	228	36%
General sight seeing	216	34%
Go shopping (pleasure)	210	33%
Pubs clubs discos etc	158	25%
Go fishing	86	13%



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Going to markets (street, weekend or art craft) (2000 onwards)	75	12%
Visit national parks or State parks	72	11%
Bushwalking or rainforest walks (2000 onwards)	72	11%

Table 4: Activities undertaken by visitors to Port Stephens 2012 (Source NVS)

International

International Visitation: (IVS)

For the calendar year 2012, Port Stephens recorded

- 122,156 international visitor nights
- 23,000 overnight visitors.
- 101,658 International Day Visitors
- 4.3% of all international visitors to NSW

The most visible and most commented on aspect of international visitation are the groups from North and South-East Asia. Much of this is day trip visitation, which is not included in the IVS statistics.

Port Stephens maintains a healthy, but recently diminishing, share of 4.3% of the state's international tourism (see discussion at under International Trends and Table 12).

The following table shows the country of origin of international overnight visitors over recent years. Whilst there are some inherent inaccuracies in the data due to sample size and the size of Port Stephens relative to Australia, the results do give an indication of the breadth and depth of visitation.

Rolling annual	Year ending December 2004	Year ending December 2009	Year ending December 2011	Year ending December 2012
Country of residence				
New Zealand	3,227	1,412	2,422	1,186
Japan	952	235	584	495
Hong Kong	545	-	550	-
Singapore	832	182	1,811	741
Malaysia	21	-	213	260
Indonesia	58	-	-	62
Taiwan	26	-	252	596
Thailand	-	89	-	-
Korea	1,218	1,941	867	952
China	-	1,047	1,341	965
Other Asia	84	313	125	867
USA	1,880	1,402	2,073	2,413
Canada	566	1,618	2,111	1,315
United Kingdom	8,900	7,188	5,285	6,206
Germany	1,972	1,410	1,742	1,204
Other Europe	5,941	5,695	5,589	4,891
Other Countries	61	975	683	814
Total	26,283	23,508	25,647	22,964

Table 5: Country of origin for international overnight visitors (source IVS)

Another indicator of the depth of international visitation is the accommodation bookings made via Book Easy. Most of these are direct online however the data also includes bookings made at the Visitor Information Centre. Table 6 below shows the source countries as a percentage of total annual visitations booked via Book Easy for 2009, 2011 and 2012. (See Appendix 3 for full list)



Combined with table 5 above, the data shows that, contrary to popular opinion, currently western hemisphere countries dominate international visitation to Port Stephens. Advice from the travel industry and anecdotal evidence from accommodation providers suggest that much of the western hemisphere business is “Free Independent Travellers” (FIT’s) largely

- Travelling the coastal route between Sydney and Brisbane (particularly in RV’s)
- Independently exploring the regions around Sydney
- Adding on a coastal destination to Hunter Valley trips

Our eastern hemisphere visitors tend to purchase packaged travel products either as group travel (leisure or incentive) or independently with known and pre-booked itineraries to destinations such as Port Stephens. They also tend not to drive or tour the same distances as their western hemisphere counterparts however there are some promising signs of increased interest in self drive itineraries.

Country	Booking Value			Number of bookings		
	2009	2011	2012	2009	2011	2012
Canada	3.8%	3.9%	4.1%	4.8%	4.4%	3.7%
China	0.5%	0.6%	1.5%	0.7%	0.6%	1.6%
Denmark	2.7%	2.3%	3.6%	1.9%	2.2%	2.7%
England/UK	33.4%	27.0%	12.2%	26.3%	22.9%	14.3%
France	2.4%	4.1%	4.4%	2.7%	5.2%	5.7%
Germany	8.4%	12.8%	12.9%	13.3%	16.0%	14.6%
Hong Kong	4.5%	2.9%	3.9%	4.3%	2.7%	3.9%
Ireland	1.4%	1.6%	1.4%	1.4%	1.9%	1.5%
Italy	0.4%	1.5%	1.1%	0.5%	1.4%	1.5%
Japan	0.9%	0.9%	0.8%	1.4%	1.2%	1.1%
Korea	0.0%	0.8%	0.8%	0.0%	0.9%	1.0%
Malaysia	0.4%	1.1%	1.3%	0.5%	0.8%	1.0%
Netherlands	6.6%	4.1%	3.7%	5.3%	5.3%	4.3%
New Zealand	9.0%	8.4%	2.5%	8.7%	5.5%	2.7%
Singapore	0.0%	5.6%	8.5%	0.0%	5.6%	8.3%
Sweden	3.7%	1.9%	1.0%	1.7%	1.5%	1.3%
Switzerland	2.5%	6.3%	4.7%	4.3%	7.1%	6.2%
USA	5.7%	4.2%	4.5%	6.5%	5.0%	5.2%
Vietnam	0.2%	0.3%	0.0%	0.2%	0.1%	11.8%
Percentage of total bookings	7%	12%	13%	6%	15%	16%

Table 6: Comparative international bookings from Book Easy (Source Book Easy)

Neighbouring regions

Given the close proximity and working relationships with Newcastle and Hunter Valley Wine Country, it is useful to investigate these destinations as well.

Figure 14 below summarises the domestic NVS data in terms of visitation to the 3 destinations. Newcastle has the largest visitation followed by Port Stephens and then Hunter Valley.



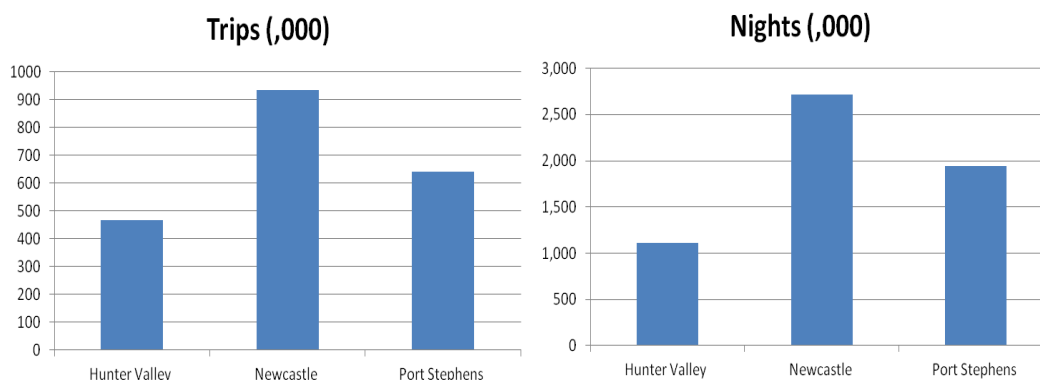


Figure 13: Comparison of visitor trips and visitor nights between Hunter Valley, Newcastle and Port Stephens (Source NVS 2012)

The above result is somewhat more clearly explained when the visitation is broken down into “purpose of visit”. Table 7 shows that Newcastle has an extremely high level of Visiting Friends and Relatives (VFR) possibly reflecting the comparatively larger residential population. These results may also indicate an opportunity for Port Stephens, being a nearby area with greater attraction / activity assets, to target Newcastle residents and their guests.

	Trips			Visitor Nights		
	Hunter Valley	Newcastle	Port Stephens	Hunter Valley	Newcastle	Port Stephens
Holiday or leisure	52%	24%	67%	52%	21%	74%
VFR	27%	51%	27%	26%	44%	21%
Business	16%	19%	4%	20%	28%	4%
Other	4%	7%	3%	2%	7%	1%

Table 7: Relative comparison of “purpose of visit” between Hunter Valley, Newcastle and Port Stephens (Source NVS 2012)

Table 7 also reveals that visitation to Port Stephens is heavily skewed towards “Holiday or Leisure” and that as a “Business” destination, scores significantly lower than both the Hunter Valley and Newcastle. Even when compared to the state of NSW as a whole, with a level of 17% Business visitation, Port Stephens does not fare well. This presents a growth opportunity for Port Stephens.

Another useful comparison can be made between the seasonality of visitation in the three destinations. Figure 14 shows that Newcastle has a more consistent level of visitation throughout the year with the notable exception of a spike in Visitor Nights over March. This is possibly the result of extended VFR stays over the holiday period or possibly even overflow accommodation when Port Stephens accommodation becomes in high demand with resultant price increases or indeed, a statistical anomaly. More investigation needs to be done to accurately understand the data and the mechanisms that lead to this result.



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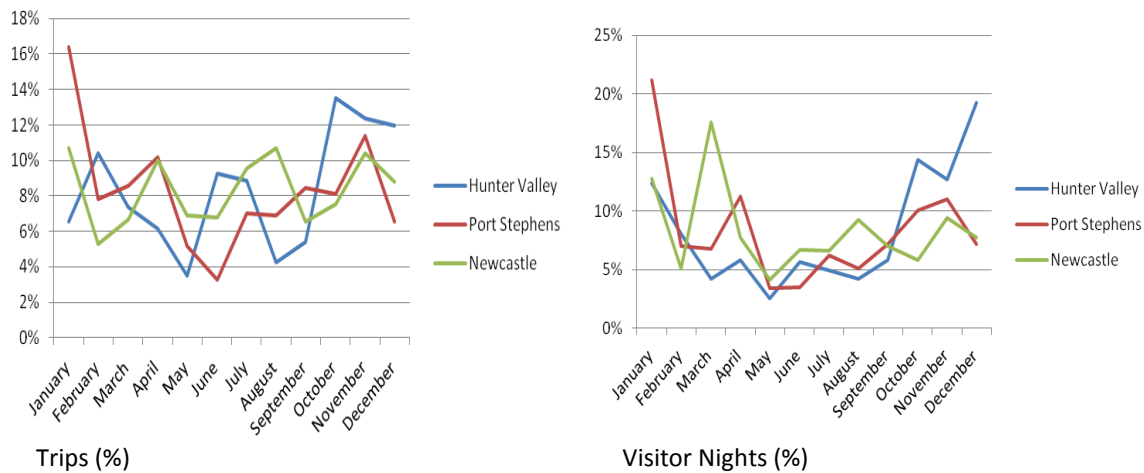


Figure 14: Comparison of seasonality between Hunter Valley, Newcastle and Port Stephens (Source NVS 2012)

The other observation that can be made from Figure 14 is differences in winter visitation when the Hunter Valley rises and Port Stephens falls. Interestingly, the relatively high level of winter trips to the Hunter Valley do not lead to a commensurate increase in nights, indicating shorter stays.

The last observation that can be made from Figure 14 is that seasonality is more pronounced in Port Stephens compared to the other two destinations, reflecting extraordinarily high occupancies over summer and lower occupancies over winter. This is in line with expectations for a coastal destination with a high focus on beaches and outdoor activities but also highlights the opportunity to find ways to reduce dependence on weather and temperature.

ACCOMMODATION CAPACITY

It is useful to understand the theoretical “carrying capacity” of the area which will assist in understanding growth possibilities for overnight stays. The analysis in Table 8 looks at ABS reported occupancies and capacity of holiday parks, holiday units and hotels/motels and calculates unfilled capacity based on quarterly data. The results indicate that Port Stephens has vacancies to the tune of;

- 251,123 sites in holiday parks
- 606,992 bed spaces in holiday lettings
- 442,327 rooms in hotels / motels

This is quite a substantial capacity, especially when the ABS data used excludes a significant number of smaller establishments and ignores private accommodation (VFR) and there appear to be a number of inaccuracies with the holiday lettings figure. The usefulness of the analysis is in that it demonstrates that the area can accommodate many more visitors if suitable strategies to attract them can be devised.

With regards to the “holiday lettings” base of properties, accurate data is unavailable. The ABS reports that there are 1217 properties (Quarter 2, 2010), Stayz lists 1314 properties (as at 10 May 2013), YesBookit lists 1083 properties between the 6 main agents on the Tomaree Peninsula) Furthermore, it appears that many holiday lettings convert to long term (3 to 6 months) rentals during the off season. Anecdotally, Port Stephens may well have up to 2000 holiday rentals available during peak season.

A similar analysis on unused capacity of attractions and activities would also be very useful however the necessary data is unavailable. This type of data is essential to effectively plan for growth and marketing strategies.



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HOLIDAY PARKS				
Sites		2712		
Quarter	Qtly Occupancy	Avg occupied / day	Avg vacant/day	Available/Q
Q1 (2010)	80.3	2178	534	48084
Q2 (2010)	70.4	1909	803	73050
Q3 (2009)	74.5	2020	692	63624
Q4 (2009)	73.4	1991	721	66368
Total		8098	2750	251,126
HOLIDAY UNITS				
Bed spaces		8343		
Quarter		Avg occupied / day	Avg vacant/day	Available/Q
Q1 (2010)	49.6	1345	1367	123016
Q2 (2010)	33.3	903	1809	164610
Q3 (2009)	28.6	776	1936	178146
Q4 (2009)	43.4	1177	1535	141219
Total		4201	6647	606,992
HOTEL MOTELS				
Rooms		1223		
Quarter		Avg occupied / day	Avg vacant/day	Available/Q
Q1 (2011)	65.5	1776	936	84208
Q2 (2011)	47.8	1296	1416	128825
Q3 (2011)	46.5	1261	1451	133485
Q4 (2011)	61.6	1671	1041	95810
Total		6004	4844	442,327

Table 8: Analysis of theoretical accommodation carrying capacity (ABS data)

TRENDS

It is important to again stress that the NVS and IVS data is variable from year to year due to issues with sample size and the area under study. Data for the state and regions is thus inherently more accurate and stable compared with data at LGA level, which is subject to unexplained fluctuations. To counter this somewhat, trending becomes a useful exercise. Tables 9 to 14 below compare various measures against the state, Blue Mountains, Hunter, North Coast and South Coast regions for both international and domestic over the years from 2005 to 2012. Average annual growths have been calculated from 1999 to 2012 to achieve an overall comparison however caution is warranted with this calculation.

Domestic

Overall, the data indicates that visitation nights are declining slightly, the number of visitor trips is increasing slightly and day visitation is growing at a healthy rate. It appears that more people are coming but staying for shorter times.



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	2005	2006	2007	2008	2009	2010	2011	2012
New South Wales	-8%	5%	-3%	-1%	-6%	2%	4%	1%
Blue Mountains	29%	-4%	-3%	8%	-18%	14%	9%	9%
Hunter	-1%	6%	8%	-6%	-2%	-5%	16%	3%
North Coast NSW	-8%	0%	10%	-9%	-1%	1%	-3%	4%
Port Stephens	21%	-11%	27%	-10%	-13%	0%	-8%	-4%
South Coast	-6%	8%	-15%	13%	-10%	0%	3%	-2%

Table 9: Year on year change in domestic overnight visitation nights (source NVS)

Since 1999 Port Stephens has experienced a long term average annual decline of 1.7% per annum which is below benchmarked areas.

	2005	2006	2007	2008	2009	2010	2011	2012
New South Wales	-7%	4%	-3%	1%	-6%	3%	4%	1%
Blue Mountains	22%	-1%	0%	6%	-17%	14%	-1%	19%
Hunter	-9%	9%	2%	-5%	-1%	1%	15%	-8%
North Coast NSW	-8%	3%	5%	-5%	-5%	5%	-1%	3%
Port Stephens	15%	-14%	29%	-4%	-9%	5%	-3%	0%
South Coast	-7%	6%	-9%	10%	-9%	-4%	9%	0%

Table 10: Year on year change domestic overnight visitor trips (source NVS)

Since 1999, Port Stephens has experienced a long term average annual increase of 0.7% per annum which is above all benchmarked areas.

	2005	2006	2007	2008	2009	2010	2011	2012
New South Wales	3%	6%	9%	-8%	5%	5%	5%	6%
South Coast	39%	5%	8%	1%	11%	-5%	21%	-4%
Hunter	6%	11%	17%	-14%	17%	7%	3%	-2%
North Coast NSW	15%	15%	5%	-14%	8%	11%	-3%	12%
Port Stephens (A)	-6%	-19%	63%	-24%	11%	-9%	12%	7%
Blue Mountains	13%	-8%	20%	-13%	11%	-6%	7%	7%

Table 11: Year on year change domestic day trips (source NVS)

Since 1999 Port Stephens has experienced a long-term average annual increase of 2.9% per annum which is significantly higher than all benchmarked areas. (next closest is North Coast with 1.5%)

International

Table 12 below shows the share of international visitors who visit Port Stephens and shows a decline over the last 3 years. This data is based on a combined day and overnight visitation.

	2009	2010	2011	2012
% of international visitors to NSW coming to PS	4.3%	5.3%	4.8%	4.3%

Table 12: Percentage of International visitors to NSW coming to Port Stephens (IVS data)

Tables 13 and 14 indicate that the long term average growth rate is still very healthy however there is some evidence that this trend may be declining over the last few years. Average yearly growth rates (long term trending) have been calculated from 1999 as the current series of stats commenced in 1998. Comparisons with the South Coast need caution as there was a break in series) As can be seen in table 13, swings in visitation of -26% to 33% over a year are indicative of statistical errors and so it is difficult to draw conclusions with confidence.



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	2005	2006	2007	2008	2009	2010	2011	2012
New South Wales	4%	1%	2%	-3%	-2%	5%	-3%	5%
South Coast	17%	-24%	20%	16%	-7%	11%	-13%	13%
Hunter	-11%	18%	-2%	0%	4%	17%	-14%	-3%
North Coast NSW	-4%	8%	9%	-4%	-5%	1%	-15%	0%
Port Stephens (A)	7%	-12%	16%	11%	-26%	33%	-18%	-10%
Blue Mountains	-12%	-1%	23%	-4%	1%	5%	4%	-11%

Table 13: Year on year change international visitors (source IVS data)

Since 1999 Port Stephens has experienced a long term average annual growth of 3.1% per annum which is significantly higher than all benchmarked areas.

	2005	2006	2007	2008	2009	2010	2011	2012
New South Wales	4%	15%	0%	3%	6%	5%	6%	2%
South Coast	-24%	-11%	2%	16%	9%	-2%	2%	19%
Hunter	-5%	-27%	62%	-7%	13%	42%	-11%	5%
North Coast NSW	1%	41%	-1%	-10%	2%	0%	-1%	6%
Port Stephens (A)	27%	-9%	-17%	14%	-14%	36%	-16%	-1%
Blue Mountains	39%	-45%	49%	13%	-10%	12%	5%	-14%

Table 14: Year on year change international visitor nights (source IVS data)

Since 1999 Port Stephens has experienced a long term average annual growth of 7.3% per annum which is greater than the results for the state and for the North Coast but slightly below other benchmarked areas.

MARKETING

Destination Port Stephens is first and foremost, a marketing organisation charged with the task of growing the industry in a sustainable manner for the benefit of business and residents alike. By diversifying into different source markets and market segments and by capitalising on new and established partnerships to attract these markets, DPS has established a diverse and successful visitor economy.

Destination Experiences and Key Visitor Source Markets

Given the nature of destination marketing and the diversity of accommodation types, attraction types and the inherent seasonality of tourism, target markets for a destination like Port Stephens must necessarily be much broader than that for any individual tourism business.

Other than emerging opportunities with the expansion of Newcastle Airport, the target audience for Port Stephens has not fundamentally changed over recent years however relative importance and methods of attracting are certainly changing.

Under the framework of this Destination Management Plan, the focus on building key visitor experiences that highlight the distinctiveness of the destination, increase the attractiveness of the destination for visitors and ultimately, increase visitor spend need to be continued.

Traditional approaches to tourism marketing are no longer relevant. Marketing strategies need to identify the products available, understand the visitor, engage more broadly with community and other industry sectors and then, market the destination and its experiences.

The key experiential themes of food and wine, health and well being, nature and adventure fit well with the attributes and assets of the destination, fit well with both domestic and international markets and are all identified tourism and social growth areas.

As part of this, Destination Port Stephens has commenced implementation of a four-year strategy aimed at building capacity and visitation around these four key themes.

The concept is one that offers many benefits to the organisation; it provide tools for building tourism product and experiences outside the traditional tourism zones of the Tomaree Peninsula, it allows opportunities for small and emerging businesses to piggy back with more sophisticated operators and most



importantly it provides mechanisms for Destination Port Stephens to increase overnight visitation in line with the VET.

It also offers flexibility to both grow demand and build supply and provides year round options and gives a range of high quality experiences which can then be marketed across a range of platforms to key visitor source markets or special interest groups.

The current geographical target markets are:

- Sydney
- Regional NSW
- Victoria
- SE Qld
- International (predominantly eastern hemisphere plus NZ)
- The current segments include:
- Experience seekers (mainly sports, lifestyle and outdoor activity related)
- Family
- Short Breaks
- MICE

The *PS I Love You* theme has been adopted in all marketing communications since 2010 and has formed the basis of successful campaigns. The theme has continued to be developed and integrated into experience led campaigns in both the domestic and international markets. Success to date and industry support all point towards the need to maintain the theme.

The full capacity of the *PS I Love You* theme has yet to be maximised by the Destination Port Stephens however, on-going planning continues to see future investment and expansion of this concept in all key domestic and international markets.

Domestic

In 2013, Destination Port Stephens promoted two domestic campaigns, which targeted the Tourism Generating Regions (TGRs) of Sydney, Regional NSW, and Victoria and in a limited capacity, SE Queensland markets under the themes of PS I Love You and Go Wild, a nature based/whale watching campaign aimed at increasing off-season revenues.

The consumer web site and the annually produced visitor guide are the main collateral pieces and call to action for most campaigns and the consumer site now has a mobile version, which automatically displays on tablets and hand held devices.

Unfortunately, the level of email and phone enquiries to the Visitor Centre in response to campaigns continues to decline to the point where the Visitor Centre phone number is often not included in advertisements and promotions. Increasingly consumers demand instantaneous, web based fulfilment. (The development of a smart phone app has commenced however it is not expected to materialise until 2014). Domestic campaigns and most of the marketing activity have a predominant strategic brand-building objective but often also have tactical member co-operative opportunities, which rely on co-operative member funding.

Member involvement in domestic marketing has generally reduced over recent years, particularly with the advent and growth of online booking engines, distress inventory sites and online travel agents / aggregators (OTA's) However there appears to be a slight resurgence over 2012 and 2013 with the change to a greater digital presence including:

- Specific campaign based landing pages
- The ability to package and sell product
- More responsive EDM's to a targeted mailing list
- Inclusion of PR
- Ability for members to advertise on the consumer site
- The inclusion of a suite of packaged promotional options (e.g., EDM, landing page, web ads)

As mentioned, a smart phone app is under development and in line with the changes in technology more and more access to the Internet will be via smart phones and portable devices. This presents monetising challenges given the limited ability to display advertisements.



Over recent years there has been a move towards the promotion of local experiences. The *PS I Love You* theme works well with experiences and it has enabled local tourism operators to design specific packages, which meet consumer demands and tastes.

Consumer shows such as the Caravan and Camping Shows continue to be well supported although brochure distribution is declining. This channel remains important for the retiree market and the general Sydney market as well as a source of *market intelligence*. They are resource intensive in terms of staffing however recent moves to design more member friendly options for involvement have ensured a continued presence at the longer shows. The current arrangements are eminently capable of being expanded to increase the number of shows at which Port Stephens is represented as a destination.

Until early 2013, marketing to the MICE market has historically been patchy and largely ineffective, as operators and DESTINATION PORT STEPHENS could not find an effective solution in working together. This has changed with the recent engagement of a contracted casual MICE Co-ordinator, the formation of the Destination Port Stephens MICE Group and the collaborative approach with Newcastle and Hunter Valley. The efforts of the MICE group to collectively market the destination has, to date, yielded impressive results in terms of investment, co-operative involvement and importantly, inquiries and bookings. It is anticipated that with continued support of providers of MICE products and services and importantly, the development of linkages with Newcastle and Hunter Valley, further opportunities can be leveraged holistically benefiting Port Stephens, directly and indirectly.

The wedding market also represents opportunities however the area lacks dedicated wedding facilities and a non-denominational chapel. Although marketing opportunities have been well supported by a small number of DESTINATION PORT STEPHENS members, the wedding market remains a significant and lucrative target market waiting to be developed to its full potential.

The PSC Events Team facilitates all aspects of event management including coordination activities and liaison with government authorities and agencies responsible for appropriate licences and permits. The service offered by the team provide a single point of contact for event activities and information relating to funding support for events from PSC as well as seed funding grants that may be available.

Destination Port Stephens provides free marketing support for confirmed events and opportunities exist to actively encourage and seek new events for Port Stephens.

Whilst some of the festivals and events have markets or other activities associated with them to keep visitors entertained, there is generally no concerted effort from a destination level. The area can achieve a greater leverage from existing and new events by providing more activities and entertainment. Visitation patterns allow this, the area is a highly desirable destination, can support many different kinds and sizes of events and the facilitation and support offered by the Events Team is comprehensive.

International

Whilst international tourism currently makes up around 10% of tourism visitation to Port Stephens and is a large contributor to the overall total visitor spend, the real value of the international market lies in the ability to address seasonality and to reduce the impact of weather on local tourism.

Port Stephens as a destination has been extremely successful in developing international tourism since the early 90's and is currently in most programs from North and South East Asia, Japan, China, India and to a slightly lesser degree, in western hemisphere programs. Besides the Blue Mountains and the Hunter Valley, Port Stephens was for many years the only regional NSW destination to both recognise the importance of the international market and to actively pursue business. This has resulted in significant results and brand awareness.

With increased competition for the international tourism dollar and the increasing importance of the inbound market as part of the customer mix, a new marketing approach needs to be adopted. Since approximately 2005, Wollongong, the South Coast and Central Coast have developed their local product offerings and marketing strategies and become major competitors. In addition the Legendary Pacific Coast is now beginning to engage the international market and destinations along it are also increasing efforts. Newcastle has been the recipient of healthy accommodation business as a result of Port Stephens' efforts and the city is now developing more suitable international ready product and embarking on marketing activities. Further afield, destinations such as Tugalooma continue to power ahead due to their ability to



effectively control the destination, develop the product and effectively market themselves. On a larger scale, Victoria is increasingly attracting international flights whilst Sydney struggles with high airport taxes and difficulties in growing air routes. Furthermore, developments such as the new Chinese theme park on the Central Coast, Glenworth Valley expansions, the Nan Tien temple in Wollongong, the Illawarra Fly and new high-speed vessels in Jervis Bay are all giving competing destinations new product offerings that continue to challenge the attractiveness of Port Stephens.

Efforts from Port Stephens continue to rely predominantly on:

- Destination Port Stephens representation at the various trade events and marketing activities
- A few local operators representing their activity/attraction product at various trade events and marketing efforts
- A number of local operators approaching tour guides, bus drivers and ITO's directly but generally not active in any other way.
- Corporate representation of properties (e.g. Mantra, Oaks)
- Families and media opportunities / families from DNSW and Tourism Australia
- One individual representing a range of local accommodation properties and a couple of restaurant options at sales calls in market and in Australia with ITO's
- Tour operators (e.g. AAT, IEC) selling day tours and boutique tour operators also including Port Stephens as a day option

Despite being located in Port Stephens, some operators curiously elect to align some of their international efforts with Newcastle Tourism.

Destination Port Stephens has also commenced cross promotional partnerships with Hunter Valley, Newcastle and the Central Coast with the view of developing an effective Sydney Surrounds / short itinerary product. Previous attempts to include the Blue Mountains have been largely unsuccessful however it is felt that eventually they, and other "Sydney Surrounds" areas, will be able to form an effective collaborative approach.

Travel to Port Stephens by Korean, Taiwanese, Chinese and Japanese visitors continues to be dominated by day trips, either scheduled services (e.g. AAT or IEC) or group series. Whilst day trips are still extremely valuable and often necessary to establish the destination in the first place, they should be treated as a means to an end; a stepping stone to overnight conversion.

Steps taken to achieve this include;

- Round trip itineraries with the inclusion of the Hunter Valley, Central Coast and Newcastle to alleviate the need to return to Sydney after an excursion.
- Promotion of the airport and itineraries to encourage either entry or egress via Newcastle Airport (NTL) with an overnight stop in Port Stephens

The level of industry engagement with Destination Port Stephens activities has diminished over recent years and there is currently no concerted push to convert to and build overnight business.

Some businesses appear to be under the belief that the business will come anyhow or, they simply accept online bookings direct from consumers without effectively understanding how these bookings come about in the first place. Other businesses such as franchised food vendors and supermarkets simply reap the substantial business that the inbound market provides without any contribution or involvement in partnership marketing.

The launch of the International Travel Planner has provided a useful piece of collateral and a vehicle for members with suitable product to leverage against, however the financial contributions are increasingly falling short of the significant cost in implementing the needed activities. In addition, corporate representations of properties tend not to promote the destination as a whole.

Based on feedback from trade representatives and agents as well as from the various consultations undertaken in preparing this plan, other key issues affecting the international market include:

- Presentation of local product becoming "tired"
- Lack of new product development
- Lack of effective base signage / information for international visitors
- Minimal cultural understanding by many businesses / information centre
- Poor tourism signage for self drive guests (domestic and international)



- Lack of local language skills, especially Mandarin
- Opening hours and days of tourism businesses (especially public holidays)
- Absence of grouped attraction / activity ticketing system (wholesale and retail)
- Bus parking issues in Nelson Bay and at the sand dunes
- Opportunity for new resorts, conference centres and theme parks
- Poor facilities / infrastructure at the sand dunes in Anna Bay

On the positive side, developments that have aided or have the potential to aid the push into the international market include:

- Planned hotel development at Williamstown
- Local uptake of Chinese cultural workshop in the Hunter Valley recently
- Planned 2014 launch of a new vessel, "Why Knot" by Port Stephens Watersports
- Participation by One Mile Beach Holiday Park in the Australian Thousand Miles Caravan Traveling promotion in Beijing.
- Planned expansion of routes to/from Newcastle airport, both domestic and international
- Completion of the Coastal walk from Birubi to Shoal Bay
- The number of sites that can be potentially used for new tourism developments
- Current international visitation and trending in Port Stephens indicates a raft of opportunities, which necessitate development of new strategies.

Left alone, Port Stephens will:

- Not be in the best position to capitalise on the tremendous brand awareness / program inclusion that currently exists
- See business go to competitors active in the same markets
- Not reap the full benefit from overnight stays with benefits going only to limited tour operators
- Miss out on opportunities to convert day visitation to overnight stay.





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Assets and Opportunities

ASSETS AND OPPORTUNITIES

Port Stephens is a destination abundant with differing physical social and cultural environments, industries, population centres and tourism product. Awareness of the area in the domestic and some segments of international markets is high as is the desirability as a tourism destination. Despite a mature visitor economy, the destination lends itself to significant growth and development.

BRAND ASSETS

As evidenced in the section on the *Significance of Port Stephens as a Destination*, the destination brand is the name “Port Stephens”. Brand awareness is extremely high however the way the brand is depicted is inconsistent across the LGA and across business sectors within the LGA. There is no universally agreed and adopted depiction of the brand, it’s essence, it’s meaning or it’s personality.

Logos

From a tourism perspective, the tag line and theme of *PS I Love You*, and brand representations such as the stamp device, fonts and colours have all helped create a uniform basis to represent the brand and effectively market the destination. Some tourism business’s have adopted various elements in their advertising, uniforms, collateral and business presentation however uptake is far from universal. The previous discussion substantiates that the name Port Stephens is well known, from a tourism perspective, it is reasonably safe to assume that the area represents beaches, dolphins, sand dunes (i.e physical attributes) as well as a coastal holiday destination within easy reach of Sydney and along the Pacific Highway.

Outside tourism, there is a proliferation of brand representations. Key examples include Port Stephens Council logos, locality gateway signs, and differing versions for real estate agents.



Figure 15: Examples of Port Stephens identities



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In many cases, locations within Port Stephens have also adopted not only their own brands (e.g. Nelson Bay) but also brand representations that are in contradiction to the various Port Stephens brandings. In contrast, other locations have incorporated elements of the PS I Love You branding as can be seen in the Karuah brochure (see figure 15), which not only identifies Port Stephens but also incorporates the stamp-branding device.

Overall however, residents and visitors are faced with an incoherent array of branding when it comes to Port Stephens. Reference has deliberately been made to residents given their significance in the visitor economy equation and the importance of branding when it comes to engendering a sense of ownership, patriotism and enthusiasm for embracing their local area and tourism.

Further confusion arises from the naming of the airport, which is a prominent feature of the destination in economic and awareness terms. The airport (jointly owned by Port Stephens and Newcastle Councils at this stage) is promoted as Newcastle Airport despite being in the heart of Port Stephens at Williamtown.

In summary:

- The destination “Port Stephens” is well known
- The way the brand is visually represented varies
- The icons / logos and strap lines vary considerably
- Some locations and organisations within Port Stephens are fiercely protective and defensive of local branding in preference to Port Stephens branding
- There has been no work completed on capturing the brand essence, personality, meaning or DNA into a uniformly agreed and accepted “style guide”
- More work needs to be done to find effective ways to incorporate and leverage the Port Stephens brand into all areas and business sectors in Port Stephens.

Still Images

There is a plethora of still imagery available in Port Stephens. Besides the substantial inventory of photos owned by local and other photographers, Destination Port Stephens maintains an image bank for members promotional use and for the media. Distribution of these images is still not ideal with only a small selection available directly on line via the corporate web site. All images are accessible at the Destination Port Stephens office or can be emailed on request.

Destination NSW and Tourism Australia also have ample images of Port Stephens.

Unsurprisingly, images tend to focus on the natural beauty / landscape of the area or on activities that visitors typically engage in. Water and sand dune shots feature highly.

Figure 15 below shows a typical range of images posted on the internet whilst figure 16 depicts the current banners used at trade and consumer shows.

The biggest shortcoming in the image library is the lack of “experience” shots featuring people from different cultural / ethnic backgrounds and from the various demographic segments that make up visitation to Port Stephens.



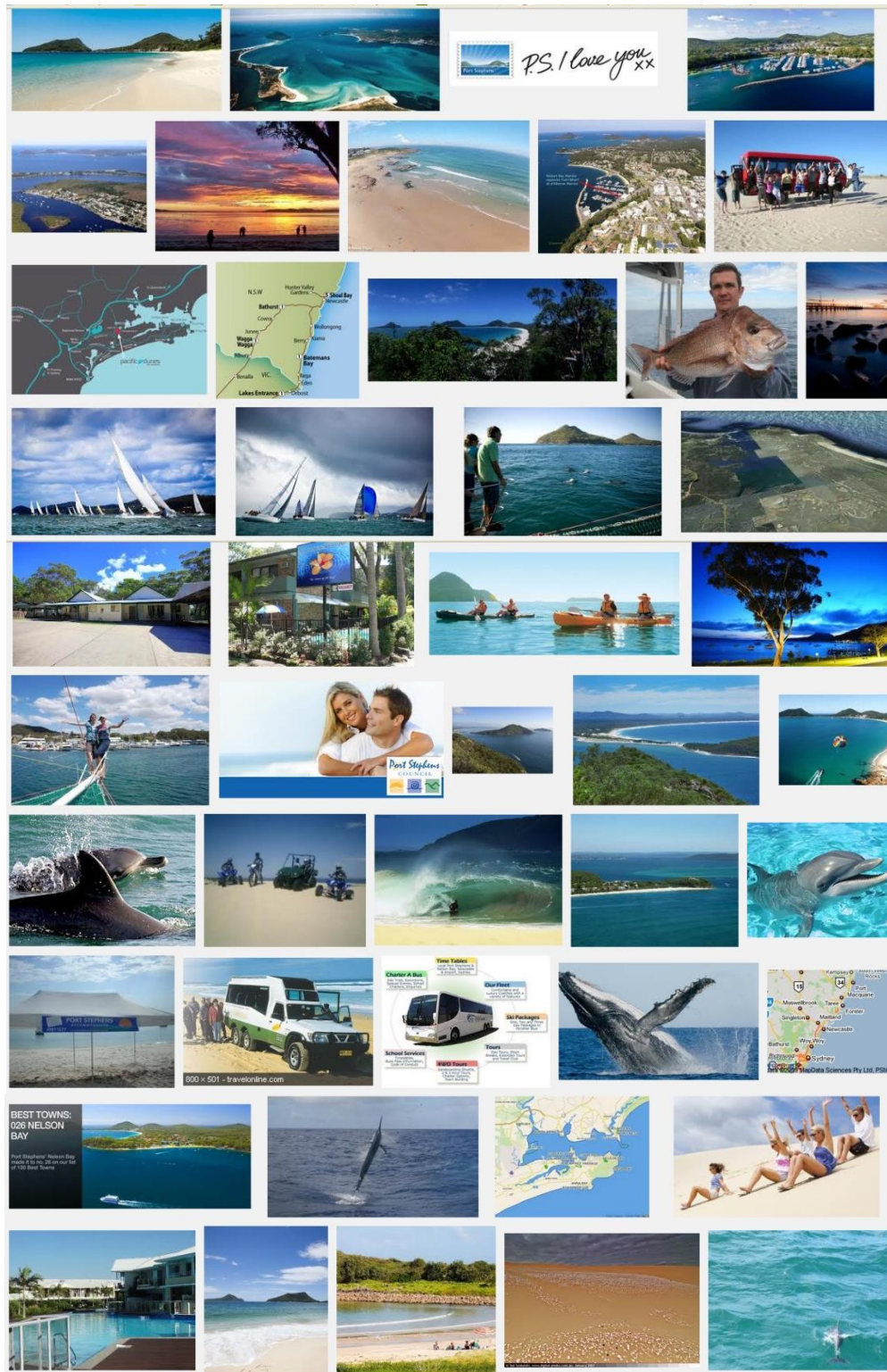


Figure 16: Port Stephens Images posted on the Internet



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Existing Port Stephens Tourism Banners



Figure 17: DESTINATION PORT STEPHENS banners for trade and consumer shows



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Videography

Destination Port Stephens has developed a series of 15, 30 and 60 sec video clips, which are used for TVC's and other promotional purposes. Whilst there are many other promotional videos, many are dated and do not fit with the *PS I Love You* theme. There is however ample raw footage, which can be readily drawn on. The corporate clips and other videos can be found on the Port Stephens YouTube channel as well as YouTube in general.

Tourism operators variously have stock video imagery for their independent promotion and this is generally available to Destination Port Stephens for destination promotion use.

Like the shortcomings in available still imagery, there is also a need for more contemporary video footage covering the many experiences and different cultures / demographic profiles that typically visit the area.

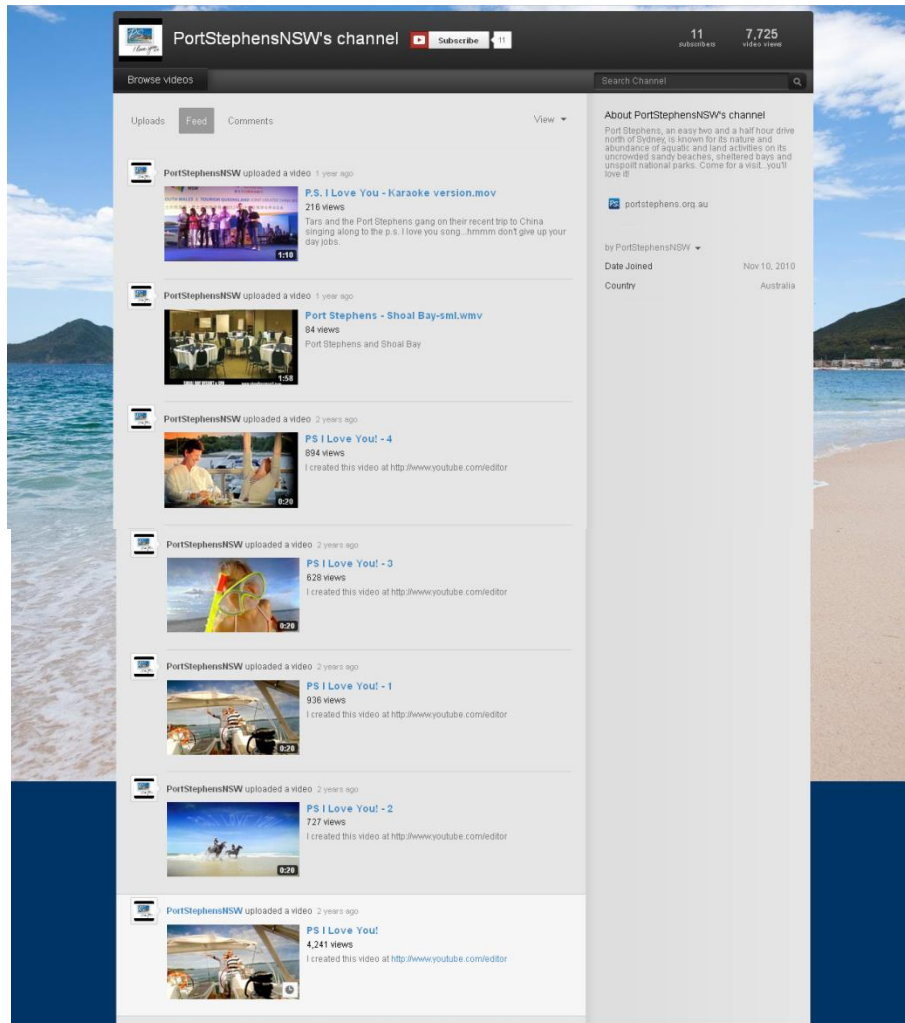


Figure 18: Port Stephens Youtube Channel.



Emotive

There is currently no clearly defined emotive description / embodiment of brand Port Stephens in the marketing communications and activities. Since the inception of the “PS I Love You” campaign, the emotional brand representation has been one of “lively fun, holiday and outdoors” and this seems to auger well with consumers and the local industry. There is no doubt that in the minds of some consumers, the brand has strong emotional attachments to memories of family holidays of past as well as romance for the myriad of honeymooners over the years. The strength, value and practical utility of these emotions have not been tested or quantified.

More work needs to be done to clearly identify the existing emotive value of brand Port Stephens and what emotions and feelings the brand needs to portray / embody.

This study needs to look at Port Stephens as a whole as undoubtedly, places like Nelson Bay are viewed differently to Tanilba Bay, Raymond Terrace and Karuah.

ATTRACTIONS

From the Visitor Economy perspective, Port Stephens has a wide base of natural and man-made attractions, which are appealing to all segments of our target markets in terms of geographic origin, lifecycle, values and lifestyle. Many man-made attractions and activities either centre on, or capitalise on, the key significant physical assets of the waterways, beaches and National Park.

Natural

The region could be described as a typical coastal / hinterland environment characterised by beaches, waterways, river system, with large areas devoted to national park or undeveloped. A number of islands are easily accessible from Port Stephens.

The most prominent natural features are the Tomaree and Yacaaba Headlands that mark the entrance to a port that is 2 ½ times the size of Sydney Harbour and Point Stephens at which becomes an island when the sand spit is covered at high tides and at other times. Figure 19 shows an aerial view of the area and highlights the predominance of water, beaches and green pristine areas.

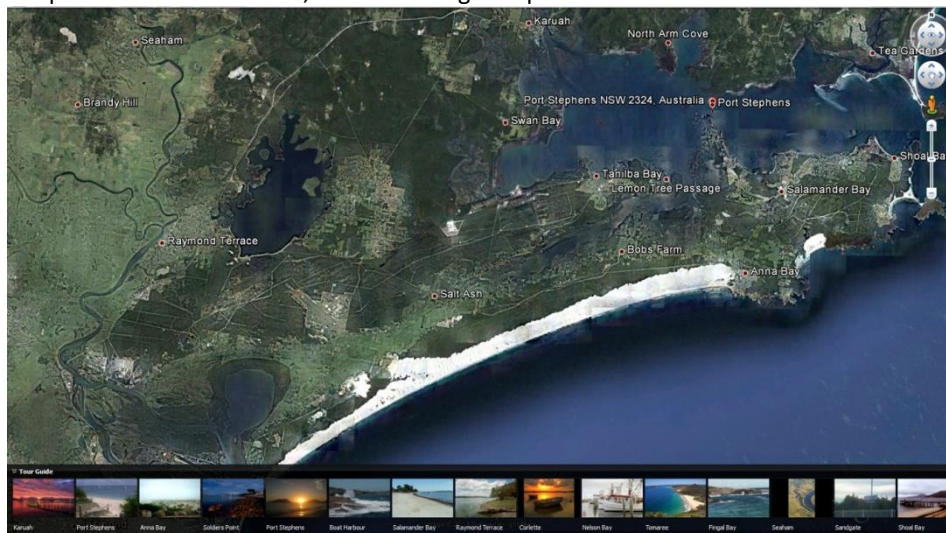


Figure 19: Satellite view of Port Stephens



Marine and National Parks

Port Stephens is in the enviable position of having an enclosed, sizeable port, river system, access to lakes and ocean frontage. The majority of the waterways constitute the Port Stephens–Great Lakes Marine Park (PSGLMP) which extends from Cape Hawke south to Birubi Beach and includes offshore waters to the 3 nautical mile limit of state waters. It includes Port Stephens and the Karuah River, the Myall River, Myall and Smiths Lakes and all their creeks and tributaries to the tidal limit. It is the largest marine park in NSW covering an area of approximately 98 000 hectares and managed by the NSW Department of Primary Industry (DPI).

“The park’s diverse marine life includes many species of dolphins, turtles, fish, invertebrates, seabirds and seaweeds along with threatened species such as the Gould’s petrel, little tern, grey nurse shark and green turtle. Humpback whales travel along the marine park coastline during their annual migration north to breeding grounds. Important oceanic islands, major estuarine wetlands and lake systems feature among a variety of park habitats.”

Many significant Indigenous cultural and spiritual sites are located within or adjacent to the marine park including middens, burial sites and traditional campsites. Aboriginal association with the sea and land in the area dates back thousands of years and Indigenous people still gather food in the traditional way.

The park is multiple use and protects marine habitats and species while catering for a wide range of sustainable activities. Appendix 5 lists the 81 Commercial Permit holders who are licensed to operate a business within the park boundaries. In addition, there are numerous one off and annual permits issued for special events, tournaments, and organised sports. There are generally over 100 active permits at any 9oint in time. Visitors and local residents can enjoy a eco-tourism activities including fishing, boating, dolphin and whale watching as well as swimming, snorkelling, kayaking and other water sports.

Fish aggregating devices, or FADS, are provided within the park as well as within nearby offshore Commonwealth waters. At present, these are not properly utilised or notified by fishermen.

The Department of Planning recently gave the Department of Primary Industry (DPI) consent to trial a fish farm in Providence Bay. This has caused some concern amongst local tourism operators.

From a sailing perspective, the waterway that constitutes Port Stephens is the only place on the NSW coast capable of hosting major sailing regattas without the need to go offshore. Despite a series of shallow sandbanks, the Port has three natural return courses eminently suitable for regattas, namely;

- Along Salamander Bay and Corlette
- On the northern side around the entrance to the Myall River, Corrie Island and Big Island.
- Off the Tilligerry Peninsula

Effectively, the Port itself can support the running of three regattas run at the same time however there is limited, and dispersed, infrastructure to attract, organise, host and administer these type of events. A dedicated aquatic centre would enhance the areas ability to facilitate water-based event and to act as a focus point for the community and visitors.

The underwater environment is also an important natural asset, albeit an environment that cannot always be readily appreciated from the surface. The area boasts significant dive sites, which can be accessed from both land and water and is home to a healthy population of seahorses, nudibranches, sharks and pelagic fish. The most popular dives sites are summarised in Table 15 however it is relevant to note that there are a host of accessible dive sites along the ocean side of Port Stephens, particularly from Anna Bay to Fingal Bay. (See Appendix 4 for a detailed listing)



Shore Dives	
Halifax Park	Nelson Bay
Fly Point	Nelson Bay
The Pipe Line	Nelson Bay
Little Beach	Nelson Bay
Boat Harbour	Boat Harbour
Boat Dives	
Broughton Island	Broughton Island is located about 20 kilometres north of Port Stephens and boasts around 8 popular dives sites.
Fingal Island	Known for sponge gardens
Cabbage Tree Island	Immediately to the east of the port
Little Island	A great dive site, especially for deep diving with depths over 40 metres.
Boondelbah Island	Safety Cove. Although the island offers a number of sites.
Wrecks	The Oakland. Lies in 27 metres of water north of Cabbage Tree Island. The Macleay. Lies in 42 metres of water off Little Island.

Table 15: Popular Port Stephens dive sites.



Figure 20: Examples of a seahorse and Nudibranches found in Port Stephens

The National Park assets, waterways / marine park and beaches are summarised in Table 16 below. (See Appendix 7 for more detailed listings)

Name	Location/destination	Recreation activity (& setting)
Tomaree NP:	Tomaree Head summit walk	Walking track and headland lookout
	Fort Tomaree walk	World War II Gun emplacements
	Point Stephens Lighthouse and Fingal Island	Historic site (Lighthouse) and walking.
	Wreck Beach walk	Bush walk, swimming, beach walking (ocean beach)
	Fishermans Bay foreshore	Picnic area, walking, kayaking (coastal rocky bay).
	Box Beach	Bush walk, swimming, surfing, beach walking
	Zenith Beach	Swimming, beach walking
	Big Rocky	Fishing and walking
	Samurai Beach	Swimming, surfing, beach fishing, walking.
	One Mile Beach	Swimming, surfing, beach fishing, walking.
	Morna Point	Bush walking (Coastal forest and rocky shore).



	Kingsley Beach	Coastal rocky shore and beach
	Little Kingsley	Bush walking (Coastal forest and rocky shore).
	Boulder Bay	Walking track to coastal, rocky shore.
Worimi Conservation Lands (WCL)	Stockton Beach	4wding (beach and dunes in Recreation Vehicle Area), horse riding, ATV/quad biking in Recreation Vehicle Area
Seaham Swamp NR	Double Wharf Day use Area	Picnic/day use area on Karuah River
	Tattersals Camping Area	Camping and picnic area on Karuah River
Karuah NP	The Common - Wallaroo NR	Day use area
	Road and trail network	Horse riding on road and trail network
	Trail network.	Horse riding on trail network
Wallaroo NP		Bush walking, horse riding and mountain biking
Medowie SCA		Bush walking, horse riding and mountain biking
Myall Lakes NP	Broughton Island	Day use (via commercial operator) Camping area (basic)

Table 16: National Park and Nature Reserves in Port Stephens (Source NPWS)

Beaches

In terms of natural assets for visitors, beaches are probably the most prominent feature of the entire NSW coast. Other than Stockton Beach and the adjacent sand dune system, it is difficult to identify truly unique selling propositions (USP's) for beaches in Port Stephens when compared to competitive areas however Port Stephens does have:

- 24 swimmable beaches
- Beaches that face all directions ensuring a large degree of independence from wind / waves
- Samurai Beach which is one of a few registered "clothes optional" beaches in NSW
- A prominent and well know bodyboarding beach (Box Beach) where national / international competitions are hosted
- Beaches that cater for small children (e.g Boat Harbour)
- A number of patrolled beaches (e.g Birubi, One Mile, Fingal) although services are seasonal
- Warmer waters compared with the South Coast however winter water temperatures, whilst swimmable, are less than the far north coast (e.g Byron Bay) where beaches and water activities are major attractors all year round.
- Many of the beaches back onto national park (see NPWS assets above)

As the largest coastal sand mass on the east coast of Australia, Stockton Beach and its associated sand dune system is not only a setting for a myriad of commercial and non-commercial activities, it is also important to recognise the significant cultural significance of the area. There is a possibility for joint naming of key locations and interpretative signage and for cultural tours.

Man Made

Port Stephens boasts a mature and extensive list of local attractions, activities, tours and restaurants available to visitors and residents. See Appendix 8 for detailed listing.

Amongst the listings are some truly world class attractions however there is a widespread belief that the presentation and standard of many attractions, activities and tours is growing tired and in need of rejuvenation, both in the presentation and the delivery.

Many of the attractions and activities were traditionally outdoors however we have witnessed the growth over recent years of indoor, weather independent offerings such as the Shark and Ray Centre, Murrays Brewery, Fighterworld and Medowie Macadamias.

Most of the man made attractions and tours are located, or start from, the Tomaree Peninsula however



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there is ample scope for the development of more facilities at places such as :

- Raymond Terrace: Riverside developments e.g kayaking,
- Karuah: Riverside, fishing, oyster farm tours and museum
- Tilligerry: sport and nature based
- Medowie, Bobs Farm, Seaham: Farm gate / produce trails / tours/ experiences

An opportunity exists for the development of an entertainment facility to host concerts, festivals, conferences and events. Scope exists for infrastructure development of facilities such as the Tomaree sporting complex and it is envisaged that the CMCA annual rally in October 2014 will act as a catalyst for this. An area such as the old Gan Gan army camp site is also ideally suited for a multi purpose complex as it has the space, isolation from residents (noise and traffic) and accessibility.

The area is also well served by a variety of restaurants serving most cuisines. It is particularly important that specific cultural, religious and medical diets can easily be catered for. This includes Halal, Kosher, Jain, and vegetarian, celiac. The various clubs offer easy and affordable meals as well as being an attraction in their own right. See Appendix 8 for a full list.

Events

Port Stephens hosts a number of events throughout the year. Appendix 10 lists currently planned events). Most of the activity occurs on the Tomaree Peninsula and local events in Tilligerry, Karuah and Raymond Terrace tend to attract a larger proportion of residents. The exception to this is some of the sporting events which spread the benefits around the Tomaree Peninsula and Raymond Terrace.

There is ample scope to significantly increase the number, size and quality of the events that are hosted in Port Stephens or indeed in association with neighbouring areas.

Other points to note:

- The Interclub Tournament / Billfish shootout is a signature event that has been hosted here for many years. Unlike when it first commenced, it is no longer a significant spectator event.
- The Trailerboat Fishing attracts many anglers and has been running for many years.
- Sail Port Stephens commenced in 2007 and has consistently grown each year to become a major local event.
- There is some doubt about the future of the Blue Water Country Music Festival which has been running for a number of years
- There is evidence that some fishing competition organisers are becoming increasingly negative towards compliance with Marine Park requirements.

Accommodation Assets

Port Stephens is characterised by an abundant variety of accommodation types, styles and levels. There is a healthy mix of Resorts, hotel / motels, holiday lettings, serviced apartments, bed and breakfasts and holiday parks.

The glaring omission from a marketing perspective is the lack of nationally branded major properties in the area. The closest that we have is the Ibis branded Salamander Shores. Until recently Peppers had a presence however the Wests Group now owns The Anchorage Port Stephens.

New accommodation developments have tended to be serviced apartment style due largely to conditions and restrictions on financing tourism accommodation in Australia. The presence of a major branded property (e.g Accor Mecure / Novotel / Sebel or Intercontinental Hotel Group Crowne Plaza / Holiday Inn / Intercontinental or a Starwood Le Meridien / Westin / Sheridan or Four Points) would send a clear signal of support for and faith in Port Stephens as a destination to the travel industry .

There is also an absence of a sizable 5 star rated property. This has not in the past presented any major impediments as the premium 4 to 4 ½ star was catered for and suited the more laid back coastal lifestyle. As both the market and destinations mature in their expectations and as Port Stephens is ideally placed as a MICE destination, the area would benefit from a sizeable five star property with conference facilities.

One of the largest sources of accommodation holiday lettings however it is difficult to ascertain the exact size of this segment (see "Analysis of Accommodation Capacity). Recent incidents in Sydney and in



particular on the Central Coast have highlighted the problems of mixing holiday lettings into residential areas and the resultant legal action and possibly legislation form a very real threat to this accommodation segment. In an attempt to ameliorate the negative impacts, the Real Estate Institute of NSW (REINSW) has developed a voluntary "Holiday Rental Code of Conduct". Universal and full adoption of this code in Port Stephens is critical if the holiday letting segment is to flourish and if residents are to accept and embrace visitors.

As is the case with attractions and activities, there is a widespread belief that a number of the accommodation properties are also growing tired and in need of renovation. Properties such as the Nelson Resort and The Anchorage are undergoing major renovations and lead the way but many more are in need of "tidying up".

There is no single complete listing of all tourism products available in Port Stephens. This in itself is a shortcoming for the area and an issue that needs to be resolved. The aim of the State and National Tourism Data Warehouse/s was to compile comprehensive and current listings of all product there are severe shortcomings of their implementation.

Using a Destination Port Stephens membership audit, the STDW listings and Internet searches, a more complete picture of accommodation assets was built and this can be found in Appendix 11.

Infrastructure Assets

Port Stephens is blessed with a solid base of infrastructure on which the visitor economy relies. Port Stephens Council is the main authority with responsibility for much of the local infrastructure, from parks, sporting fields, waterfront, local roads. Not only do they manage these assets but often they are responsible for planning and building as well. Accordingly, Council will play a major role in any discussion on assets.

At this juncture, it is worth commenting on the amenity / presentation of the area as this was a commonly raised issue in the consultations. Much comment has been made about the visual presentation of the drive into the Tomaree Peninsula and about Nelson Bay and Tanilba Bay / Lemon Tree Passage in particular.

Common perceptions included:

- Too many unsightly and damaged signs
- Leaning poles
- Poor landscaping
- No sense of arrival; visitors entering Port Stephens from Hexham or the Tomaree Peninsula along Nelson Bay Rd or Tanilba Bay along Lemon Tree Passage Road do not feel like they are entering somewhere special.
- No pride in presentation
- Poor directional and informational signage
- Confusion about the townships
- Cleanliness of the towns (particularly Nelson Bay) and the state of empty shops.
- State of the flags in Apex Park
- Poor state of car parking area at the start of the walk up Tomaree Headland.
- No unity in signage, street furniture, presentation around the area
- Poor co-ordination and implementation of garbage collection days

These sentiments are in line with the findings and the direction of the Nelson Bay Town Centre and Foreshore Strategy, which addresses most of the issues and continues to guide development of the locality. Positive comments were however made about the development along the Nelson Bay foreshore as an example of what could be achieved. The Shoal Bay Wharf re-development is also seen as a real asset and as an example of the value of public assets to the visitor economy and to the community.

Table 17 below gives an overview of the key infrastructure relevant to the visitor economy.



What	Description	Relevance / Issues
Airport	Newcastle Airport in the heart of Port Stephens (see also discussion below)	Expansion of routes inc Adelaide, Perth, Cairns and International Ability to convert day trips to overnight for inbound Fly drive packages. Needs to be renamed as no connection to Port Stephens.
M1	Freeway from Sydney	Main vehicular connection from the south. Congestion esp holiday periods and end of weekend Expansion into Port Stephens
Sporting Fields	48 sporting fields in Port Stephens	Maintained to a high standard. Opportunity for greater utilisation
Cycleways	Dedicated cycleways/ Pedestrian pathways on Tomaree Peninsula and Grahamstown Dam area	Need greater linkages and expansion
Accommodation	Broad mix of all accommodation types	See audit for listing. Ageing of properties More nationally branded resorts / hotels needed Larger hotels needed to cater for inbound and group market
Tracks, trails, lookouts	Walking tracks and key lookouts at Tomaree and Gan Gan	Tomaree park trails need connecting Local walking trails need identification and interpretation (see below)
Marina, boat ramps	2 main marinas and boat ramps around the destination	Concrete and maintained ramps in the port but ocean side locations are beach based (see below)
Picnic / BBQ / toilets public amenities	Spread throughout the destination. Free BBQ's	Generally well kept and more are always welcome. Toilets insufficient to meet demand in Nelson Bay and Anna Bay at the head of the dunes
Wharves	Particularly at Little Beach, Salamander Soldiers Point	More wanted / needed. Great fishing spots
Visitor Info Centre	Level 1 centre in Nelson Bay	Insufficient parking Undergoing revamp
Public Transport	Port Stephens Coaches	Local services, airport and Newcastle connections and daily Sydney service. Tilligerry and other areas not well serviced
Rail	In Newcastle	Whilst strictly not in Port Stephens, the rail with connecting buses services the destination

Table 17: Infrastructure in Port Stephens

Airport

Located within the Port Stephens LGA, Newcastle Airport (NTL) is of strategic importance to the local and regional visitor. It offers very real potential for growth from new domestic and international markets as well



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as enabling the area to convert existing day trips into overnight stays. From a Port Stephens perspective, it is unfortunate that the airport name does not reflect its location nor recognise the importance of Port Stephens as a brand and hence a recommendation of this plan that application be made to include "Port Stephens" in the name.

Figure 21 shows existing demand (in blue) and potential demand for travel to/from NTL for a range of currently unserved markets. The key destinations that stand out are Perth and Adelaide, two routes that Newcastle Airport staff are currently working towards commencing. The third destination / origin of strategic interest is Cairns which Newcastle Airport staff and DESTINATION PORT STEPHENS are also working on. Whilst the demand is relatively lower it is still significant at 311 weekly passengers and 941 with 150% stimulation, the real value is the ability to influence international itineraries to move from a day trip to overnight or no visit to day trip.

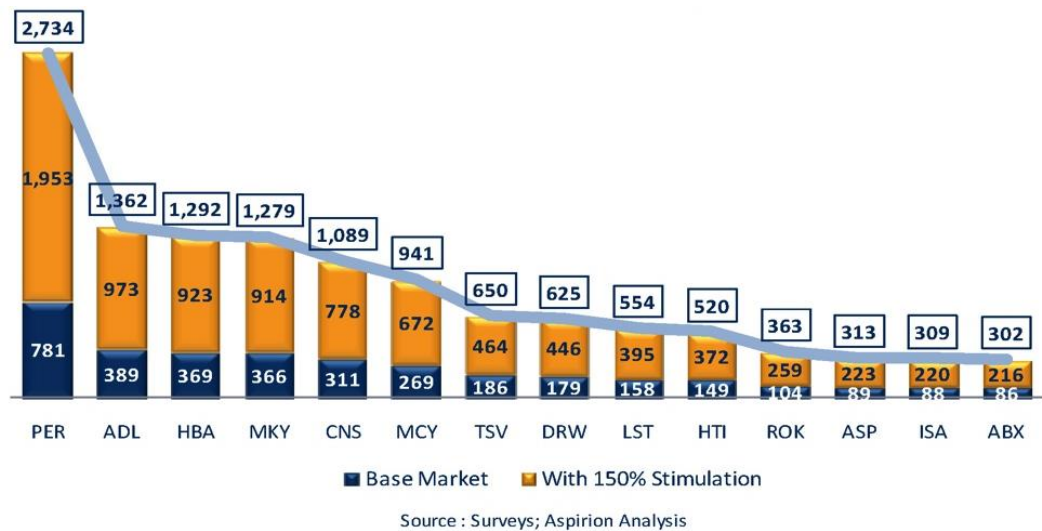


Figure 21: 2014 Origin-Destination Market Sizes for Unserved Markets.
Passengers weekly Each Way:

Newcastle Airport has secured funding for the next expansion to include customs and immigration facilities sufficient to adequately handle travel to/from New Zealand under new proposed immigration requirements. Fig 22 highlights the potential markets available.

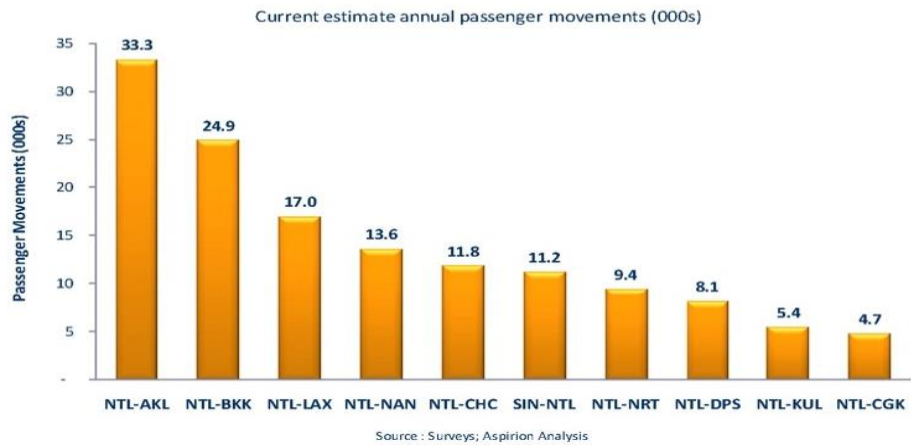


Figure 22: Total Potential International Routes:



The above graphs demonstrate very real and significant potential however it must be recognised that:

- The data includes all travel, including people living in a 2-3 hour catchment area travelling away from the destination.
- The data is an estimate and not proven
- Incoming passengers will travel to a range of local destinations that does not always include Port Stephens.
- Airlines need to service the routes which are evaluated on commercial terms against aircraft utilisation on other routes in Australia / internationally.

Despite these limitations, the airport has the ability to drive visitation to Port Stephens and the region and to have a major impact on new and existing business.

Boat Ramps

Given the extent of local waterways and the level of experiences and activities available to visitors, access to the water by various craft is of paramount importance. Following is a list of boat ramps in Port Stephens which at face value, is quite extensive. It must however be noted that the popular ramps at Little Beach, Shoal Bay can be extremely congested during peak times and that a number are essentially beach launching sites that are generally only accessible to 4WD's. Signage at each boat ramp is ad hoc and does not enhance the experience nor provide clear and concise information for the boating public. The ramps also serve as launching points for kayaks as often they have parking associated with them.

- Boat Harbour Beach Launch
- Karuah Boat Ramp
- Lemon Tree Passage Boat Ramp
- Mallabula Boat Ramp
- Nelson Bay Boat Ramp
- Little Beach Boat Ramp
- Raymond Terrace Boat Ramp (Seaham Street)
- Raymond Terrace North Boat Ramp (Glenelg Street)
- Salamander Shores Boat Ramp
- Shoal Bay Boat Ramp
- Soldiers Point Boat Ramp
- Tanilba Bay Boat Ramp
- Taylors Beach Boat Ramp
- Tomago Boat Ramp

Walking Trails

There are a number of trails around Port Stephens however one in particular warrants special mention. Port Stephens currently has a scenic walking trail from Tomaree Head to Big Rocky. The section between Big Rocky and Fingal in particular is well developed in sympathy with the environment and is well signposted and has ample interpretation signage. With extension to Birubi in the future, Anna Bay will be linked to Tomaree Headland with a world class walking track from which further product can develop (e.g café's, bed and breakfasts, experiences)

The Tilligerry also has a boardwalk / trail that is a real asset to the locality and is currently being used quite heavily by visitors / residents.

Sporting Facilities

Port Stephens is blessed with numerous quality sporting facilities spread throughout the local government area. As mentioned previously, the destination is already a popular host for many sporting events however there is scope for better use of the assets.

A full list of sporting facilities can be found at Appendix 13.



Surrounding Regions

The areas immediately surrounding Port Stephens are of strategic importance and value from a tourism perspective as they offer complimentary experiences for visitors and in many instances, form part of the Port Stephens destination experience in their minds. The political boundaries either do not exist or are ill defined in the minds of consumers. Visitors also travel to these areas during their stay in Port Stephens, for example, the ferry to Tea Gardens, day trips to Hunter Valley, excursions to Morpeth, travel via Newcastle. As a larger region, it is characterised by extensive waterways, natural areas, wilderness, city, beaches and rural hinterland, all complementary product from a visitor perspective. Figure 23 shows an overview of the region and highlights the diversity of environments.

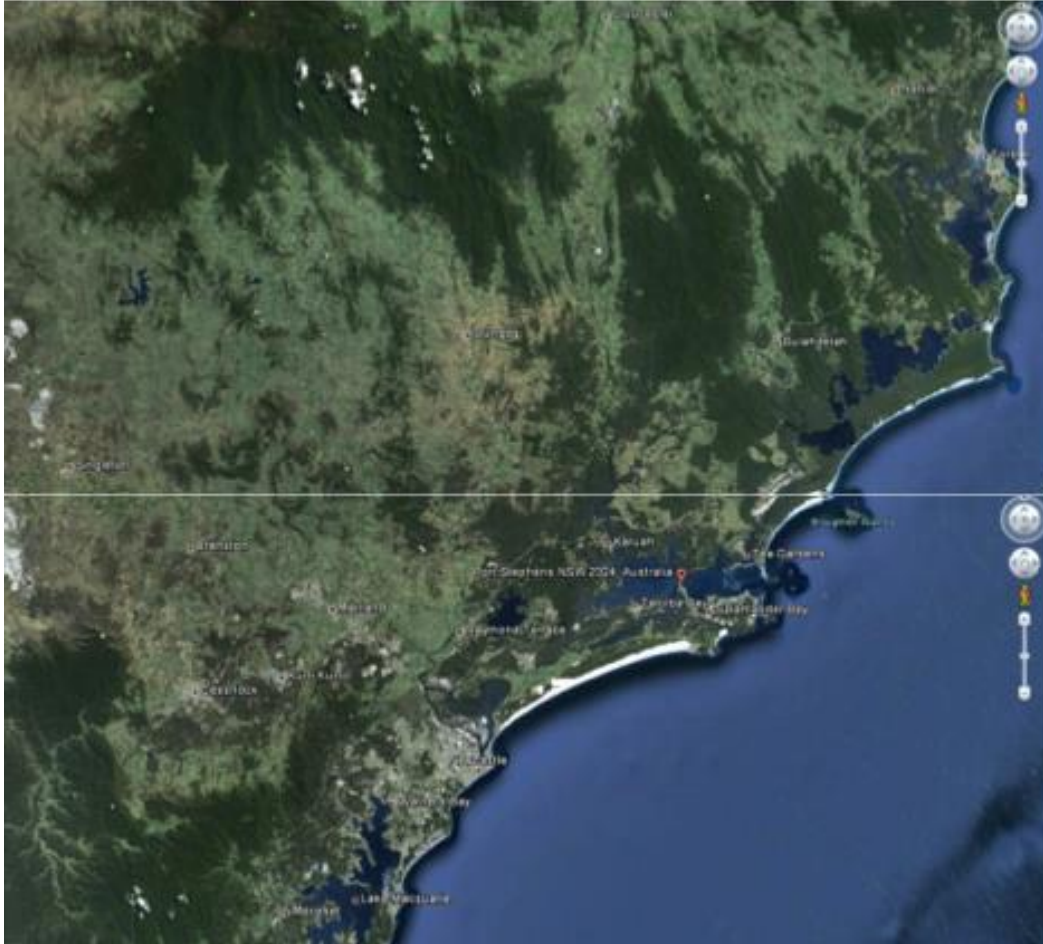


Figure 23: Satellite view of Port Stephens and the surrounding region

An important observation to note about the 3 destinations of Port Stephens, Newcastle and the Hunter Valley is the complementary nature of the products in these areas. Port Stephens is predominantly a coastal activity and nature destination; Newcastle is predominantly a city / culture destination whilst the Hunter Valley is predominantly a food and wine region. Each area has a number of visitor experiences but there is little overlap meaning that the region ideally lends itself to joint itinerary and product development whereby the strength of one destination can be used to the benefit of the others. This was a basic premise of the Hunter region in the past however it is felt that one of the major reasons that the regional efforts were largely unsuccessful was the use of regional branding.

Other synergistic collaborations can be found via the Legendary Pacific Coast touring route but this is more of a marketing vehicle to get visitors “to the front door” and then to extract maximum value of locally developed products and experiences.



Additionally the wider Hunter region along with Great Lakes affords ample opportunity for the development of adventure style events and experiences.

North Coast

The North Coast region starts at Port Stephens and continues to the Qld border. It is characterised by a hinterland of lush river valleys and a coastline of sparkling uncrowded beaches. The Legendary Pacific Coast Touring Route is a signature touring experience that ties the areas along the region together and Port Stephens is an integral part of that. Collectively, the North Coast has some of the best, and most well known, beaches in Australia at Byron Bay, Lennox Head, around Coffs Harbour and Port Macquarie, Port Stephens and Newcastle.

Hunter Region

From a regional perspective, the Hunter includes the towns, vineyards and national parks of the Hunter Valley, the Upper Hunter and Barrington Tops. From a tourism perspective, the Hunter Valley wine growing region is a significant attraction enjoying the highest brand awareness for short breaks. Being approx. 1 ½ hours drive from Port Stephens and having different but complimentary and mature tourism product, the area forms a natural partnership with Port Stephens. The main attraction for visitors to this area centres on wine, food and entertainment with many international class concerts being staged there throughout the year.

Gloucester / Barrington Tops Area

Immediately to the north west of Port Stephens and within easy reach by car and train, lies the world heritage area of Barrington Tops and Gloucester.

Gloucester is a vibrant, large country town in a picturesque river valley at the junction of the Avon, Gloucester and Barrington Rivers, under a range of impressive monolithic hills called The Bucketts. The rainforests of Barrington Tops National Park are of international significance; forming part of the Gondwana Rainforests of Australia World Heritage Area. Carved out of ancient volcanic flows, the park rises from near sea level to over 1500m and protects one of the largest temperate rainforests in mainland Australia, along with a host of diverse habitats and wide range of birds and animals.

“The park is a bushwalker’s paradise, with an excellent walking track network that includes short and easy walks to more difficult overnight hikes, with plenty of sites to set up a bush camp for the evening. There are lots of picnic and barbecue areas to enjoy, cycling trails to be explored and views from the park’s lookouts that need to be seen to be believed. Fishing is a popular activity in the park between October and May; you might catch a rainbow or brown trout.”

Great Lakes Region

Located north from the shores of Port Stephens, the Great Lakes region offers a relatively undeveloped natural area defined by water, beaches and forests as well as ample recreational activities in that environment. The lakes also form part of the Port Stephens Great Lakes Marine Park (PSGLMP). As such it is worthy of mention in any investigation into opportunities for Port Stephens.

“The Great Lakes region is characterised by a unique triple lakes system, meandering rivers, three National Parks, vast tracts of forest, 145km of stunning coastline, golden beaches, true wilderness, rich history and a rolling hinterland all with the magnificent Great Dividing Range as a backdrop.”

The Great Lakes has three national parks- Myall Lakes, Booti Booti and Wallingat. They stretch along the Myall Coast all the way to Foster and inland towards Stroud. Within the Parks there are trails, camping grounds, history, wildlife, lookouts and nature at its finest.

The three main lakes, Smiths, Wallis and Myall each have their own personality and are recreational hubs offering a multitude of options from paddling, sailing, swimming or boating, fishing and bird spotting. They are also home to an incredible diversity of wildlife and plant life. The Myall Lakes area is listed as a wetland of international significance and subject to several international migratory bird agreements.



Newcastle

As a major city adjacent to Port Stephens and situated on the southern end of Stockton Beach, Newcastle also forms a natural partnership. The city has a number of nationally branded accommodation options (Mecure, Novotel, Travelodge, Quest, Crowne Plaza etc.) and forms a transport hub for the region in terms of rail and bus. Whilst located in Port Stephens, the airport is named Newcastle Airport. At the current time, the majority of attractions are city based although products such as the Hunter Wetlands, Blackbutt Reserve and Glenrock State Conservation area do provide nature based attractions and activities. Once known solely for its industrial past, that image is being challenged and changed with the development of the waterfront precincts and maturing of accommodation, attraction and activity products.

Digital

Destination Port Stephens has an extensive arsenal of digital assets including:

- 13,629 Facebook Friends (as at January 2014)
- 1,113 Twitter followers
- e-holiday club database 14,300 members (cleaned database)
- International travel industry list: over 2,500
- Consumer web site: www.portstephens.org.au
- Corporate web site: www.portstephentourism.com.au
- Domain names: A number of domain names have been registered for working and planned web sites (See appendix 14)





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Vision and Strategy

THE VISION

In 2020, Port Stephens will have a vibrant, mature, engaged and significant visitor economy that is the envy of other destinations. The tourism industry will enjoy wide support of all stakeholders who recognise the importance of the visitor economy and work together, openly sharing knowledge and skills and working collaboratively to grow the tourism industry in Port Stephens. Strategic relationships with other areas, organisations and governments at all levels will form a solid foundation for lasting and effective partnerships to support and grow the visitor economy. Port Stephens will be the regional destination market leader in NSW with an innovative and sustainable tourism industry.

Destination Port Stephens: will be recognised by all local visitor related businesses and groups for their leadership, will be widely accepted as the organisation responsible for marketing the destination and will play a key role in the management and development of Port Stephens as a destination. The area will have outperformed the state and our competitive destinations in relation to the percentage growth in the Visitor Economy targets set in the Federal government's 2020 Tourism strategy.

Visitors: Our visitors will come from a diverse international and domestic market base and along with potential visitors, will have a positive attitude towards holidaying in Port Stephens. They will be well informed about the destination and will be able to access and book all tourism product instantly wherever they are and on any device. When visiting Port Stephens, they will experience friendly, knowledgeable and engaging interactions with tourism industry and other business staff as well as with locals. Our customer service will be exemplary. There will be clearly identified walking and touring routes as well as effective local signage and information. They will benefit from a high level of packaging and collaboration between businesses within Port Stephens as well as businesses in the wider destination such as, but not limited to, Newcastle and the Hunter Valley. We will experience consistent levels of visitation throughout the year. They will leave the area with positive memories, intentions to return and become brand ambassadors. In short, their expectations will have been exceeded.

Residents: By 2020, residents will have a greater understanding of the industry and will be proud to show off our local destination to friends, relatives and visitors. Residents and business owners will understand and actively engage with visitors. They will seek opportunities to interact with our visitors to learn about their culture and share ours.

Residents will understand and will be able to take full advantage of the cultural and social benefits that tourism provides and will be acknowledged beneficiaries of the infrastructure that tourism provides. They will see tourism as a great and honourable source of employment and appreciate the opportunities provided to the youth of the area. They will become brand ambassadors.

Destination Port Stephens: will have completed its transformation into an enthusiastically supported destination management organisation, respected by the industry and stakeholders and recognised by all local visitor related businesses and groups for their leadership. The organisation will be able to focus on destination marketing, development and management tasks. Whilst still enjoying financial support from council via the rate levy, increased funding will be sourced from sponsorships, industry grants and support, membership, merchandising sales and co-operative buy-in's to programs.

Destination Port Stephens will facilitate training in collaboration with training providers and other organisations. Industry staff will be able to take advantage of an active professional development-training program.

The opportunities and activities afforded by Destination Port Stephens will be recognised by industry as valuable and enthusiastically supported with membership, participation and buy-in.

The area will have outperformed the state and our competitive destinations in relation to the percentage growth in the Visitor Economy targets set in the Federal government's 2020 Tourism strategy.

The Board: The Destination Port Stephens Board will have remained essentially the same size as it was in 2012, but it's composition may include representation from the wider business and/or residential



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communities whilst maintaining diversity in geographical and business sectors. Council will retain a seat on the Board however it will have given up one position in recognition of the maturity and success of the organisation and the increased industry investment. The board will be focused on policy and strategic issues and will display a high level of professionalism in carrying out their duties, supported by a Professional Development program.

Council and Local Organisations: In 2020 we will still have a council that understands, values and enthusiastically supports tourism and the visitor economy as a significant and desirable industry. Business Chambers and other industry groups will also value our efforts and be actively and positively involved in Destination Port Stephens initiatives. All organisations will have a clear understanding of individual roles and will be working to achieve a shared vision.

Destination Marketing: Links with surrounding destinations, regions and relevant organisations will be well established and will be actively used for marketing where there is benefit to Port Stephens. Port Stephens will have a strong sense of identity with clear branding, signage and theming. Passengers arriving at our airport will know that they are in Port Stephens. All townships within the Local Government Area will voluntarily and enthusiastically embrace the Port Stephens branding and incorporate the Port Stephens branding “DNA” into their marketing and will see value in our co-operative and destination marketing programs.

Technology: Existing and new technologies will be embraced and used extensively in running the business and communicating with our customers and stakeholders. Local businesses will have a high level of understanding and use of technology as a result of Destination Port Stephen’s leadership and efforts in training. All major shopping areas and places where visitors frequent will have free WiFi access. Destination Port Stephens will lead by example AND Port Stephens uptake and use of technology by the visitor economy sector will be the most digitally enabled tourism destination in the country.

Transport: By 2020 Port Stephens will be a viable destination for travellers without vehicles. The area will have an established and timely daily bus service to/from Sydney addition to the existing service. Buses will offer a high level of connectivity with city rail trains as well as the country link service. There will be a daily return service to the Hunter Valley with airport stopovers and visitors will be able to take advantage of the easy connections with other main bus companies travelling along the Pacific Highway. At least one major car rental company will be able to provide rental vehicles on the Tomaree Peninsula. Our airport will bear the name “Port Stephens” and it will be a domestic and international gateway to the region.

We will have alternate transport system, improved cycleway and be the leaders in personal energy efficient, environmentally friendly and innovative local transport systems.

CONSTRAINTS AND CHALLENGES

Whilst Port Stephens does indeed have a significant breadth and depth of product, there are major gaps that need to be addressed to grow the visitor economy, particularly in an environment of higher visitor expectations and maturing competition at all levels.

The key constraints and challenges that were commonly identified during stakeholder consultations were the need for:

- Improved customer service
- More quality, nationally branded resorts and hotels
- Better and larger convention facilities
- Improved infrastructure at the entrance to the sand dunes at Anna Bay to better service the level of visitation
- Cultural, heritage type product and events
- Improved after hour’s service and availability (visitors looking for accommodation when arriving late).
- More nightlife (activities, places to dine, entertainment etc.)



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- Beautification of the area as a whole and in particular CBD's and major entry and exit roads
- Improved standard, presentation and delivery of attractions and activities
- New and unique attractions
- High end dining experiences
- Broader experiences and product development at a regional level e.g.: MICE, food and wine, nature, adventure, events
- A centralised, international standard, master planned complex with accommodation, entertainment and activity facilities.
- Land and water based facilities to enable the hosting of sailing regattas.
- Expansion of the events calendar to host a flagship event each month.
- Acceptance of credit cards (generally) and international cards such as CUP (China Union Pay)
- Extended and joined cycleways and walkways.
- Better engagement with local residents
- Improved rail and bus connections
- Improved local public transport
- Daily bus and coach services between Sydney and Port Stephens and Hunter Valley and Port Stephens
- A dedicated visitor transport system linking attractions, activities and accommodation.
- Improved infrastructure to facilitate events and festivals
- Mountain bike tracks for recreation and competition
- Motor racing track (Raymond Terrace)
- Oyster Museum (Karuah)
- Kayaking trails and route development and promotion
- Wedding facilities
- Improved signposting
- Free Wi Fi in all major locations
- Complete experience products and itineraries

STRATEGIES AND RECOMMENDATION

Over the past five years, DPS has participated in a number of significant studies undertaken by PSC and associated organisations. DPS has also worked on various strategic plans and undertaken detailed reviews of the 2013 Visitor Economy Taskforce Final Report and the Visitor Economy Action Plan.

To meet the NSW State Government goals of doubling overnight visitation by 2020, Destination Port Stephens needs to work collaboratively with a range of partners, work innovatively to maximise investment and needs to prioritise activities which can make quick and effective change and also, those that lay strong foundations for the future.

A critical activity which will lay the foundation for the successful implementation of this DMP is to immediately undertake a comprehensive Port Stephens branding project to identify brand essence, value, emotion and depiction (see recommendation 1.1 Destination Marketing – Branding). This exercise will provide a common and agreed sense of identity amongst all stakeholders and provide the fundamental framework for the successful implementation of this plan the development of the destination for the long term.

With this in mind, Destination Port Stephens has determined three key strategic priorities:

- Destination Management
- Destination Development
- Destination Marketing

Destination Management

Destination Management is about how Port Stephens can **match the promise**; the ways in which destination image is presented and how to ensure that the destination provides a quality visitor experience. This is not always the experience with a particular product but in some instances may be experiences such



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as standout customer service or the quality and presentation of the destination.

Destination Management provides the basis for sustainable growth and requires partnerships between community, business and industry all working under an agreed framework and vision for the destination. Port Stephens has a chequered history with development of tourism projects over the years. Development in the past has however not been approached from a master planned and co-ordinated perspective but rather on an individual project-by-project basis. An LGA wide change of culture towards customer satisfaction and experience delivery along with a determination to lift the standard of presentation of the area as well as that of our attractions, activities and accommodation is essential to achieving successful outcomes for management of the destination.

Recommendations

- Encourage and support a more diverse range of quality experiences that meet the needs of visitors now and into the future
- Implement strategies to measure and improve service quality and standards to make Port Stephens the standout destination for customer service
- Develop world class visitor information and inspiration systems
- Work with the community to build a shared value of tourism industry resources and experiences

Destination Development

Destination Development is about creating and maintaining visitor experiences, saleable products and services, which meet visitor needs and expectations, reflect the destination brand and facilitate the elements of a journey within the destination.

This may not be restricted to hard infrastructure such as transport, accommodation, attractions and but may also require investment in soft infrastructure such as interpretation to make the visitor experience more accessible and interesting.

The integrated management of a destination is an onerous undertaking. In the past, the task has variously been undertaken by Port Stephens Council, Port Stephens Tourism, business chambers, government departments (such as National Parks and Wildlife and the Department of Trade and Investment) and individual businesses.

However, in keeping with the themes of the Visitor Economy Taskforce and the new NSW Government approach, organisational *silos* need to be eliminated, communication opened up and a co-ordinated and managed approach needs to be adopted. That approach must be based on the notion of *shared value*. The consultation process of the DMP has revealed a universal acceptance of the importance of effective branding, the value of branding and the desire to work co-operatively to extract the maximum possible benefits.

Destination Port Stephens needs to provide the leadership to make it happen.

The DMP development process has highlighted the need for a more robust and stronger corporate structure. At present the Marketing Manager has the responsibility of Executive Officer and Marketing Manager. If the plan is supported and adopted, there is an imperative to negotiate relationships with Council, shore up financial support and strengthen the corporate structure with a General Manager, Marketing Manager and Administration Officer at the minimum with support for specific projects and key areas of operation.

Hunter Valley Wine Country now has found significant funding from its partnership with the Wine Makers Group (although there is still a significant dependence on local government and a number of operational issues need to be resolved). Wollongong has city marketing funds. Port Stephens similarly needs to find the necessary financial resources to effectively market and manage the destination.

Recommendations

- Within the framework of shared values, provide leadership to guide the visitor economy on a path of world's best practice
- Position and enable Destination Port Stephens to be an effective, supported and pro-active Destination



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Management Organisation

- Encourage and support the development and improvement of regional and local infrastructure to improve the local amenity and facilitate visitor access to and dispersal throughout the region
- Ensure the long term conservation of Port Stephens's unique natural and social assets on which the visitor economy depends by adhering to world's best practice for nature based tourism values and eco tourism principals
- Work co-operatively with surrounding destinations, local, state and federal government departments and the business community to improve access to and within Port Stephens
- Design and implement advanced information gathering and interpretation systems to provide a sound basis for strategic decision making

Destination Marketing

Destination Marketing is about growing visitor and community awareness and demand for the destination in line with the destination brand and all it represents. It involves clearly and effectively communicating what Port Stephens has to offer including the unique propositions perceived by visitors before they arrive and what they experience once they are in the destination. Marketing and promotion are also about providing a sales opportunity for the destination.

Port Stephens already has demonstrable strong destination branding. The challenges are to improve brand awareness to the number one spot for short break holiday destinations and importantly to broaden consumers' perception and understanding of the brand beyond a beach and coastal destination; in other words, brand depth.

Currently the Tomaree Peninsula is seen by many as *Port Stephens*. The previous section outlines the product and infrastructure requirements required to grow the destination and, combined with strong and sound marketing, there is no doubt that this perception can be changed and the whole of Port Stephens can be positioned as the leading regional destination in NSW with an unparalleled depth of world-class experiences on offer.

One of the most fundamental requirements to the long-term success of building motivation for visiting the destination is the development and uptake of common themes and branding elements. In other words, fully develop the brand DNA in terms of essence, value, emotion (feeling), and representation. This is not just about adopting a new logo or brochure, but more about all stakeholders working together to develop and adopt common themes and branding elements.

Destination Port Stephens needs to ensure a consistent and unified message to consumers supported by all businesses, residents, local government and other destination marketing associations.

Some marketing activities can be undertaken independently whilst others are best undertaken collaboratively. For example, Port Stephens can target the short break or family holiday market in Sydney alone as this is a mono destination. Greater synergies however could be available in targeting new interstate markets with joint activities under the Sydney Surrounds banner or together with Newcastle and the Hunter Valley. Sales in the inbound market focus not on a single destination but on itineraries.

Adjoining areas such as Hunter Valley are not so much competitors but indeed are part of the overall solution needed to attract visitation. A cluster or group of destinations is thus viewed as the destination. For example in the international market, the Hunter Valley, Port Stephens, Newcastle, Central Coast and Sydney loop or for the domestic market Port Stephens and Newcastle or Hunter Valley. The key question is how to present branding collectively in joint promotions.

The answer may prove challenging however the previous branded regional approach has been shown not to be the answer.

Recommendations

- Build a strong, sustainable and collective brand strategy to establish pride, positioning, competitive advantage, brand platform elements and a destination promise
- Design and implement well researched, focused, targeted and supported campaigns to raise awareness of and intention to travel to Port Stephens to meet the 2020 target of doubling overnight visitation



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- Expand successful international campaigns to further diversify into key international markets to reduce business risk, increase cultural diversity and increase offseason and midweek visitation
- In partnership with Port Stephens Council, continue to work with surrounding destinations and event organisers to attract and host signature events which support and enhance the lifestyle of residents and the experience of visitors to Port Stephens
- Increase the volume and yield of the group, meeting, incentive and convention market to diversity the visitor economy and provide strong foundations for future investment in facilities and products in Port Stephens
- Adopt an innovative and extensive use of social media and other digital technology to become the most digitally capable tourism destination in Australia

DESTINATION MANAGEMENT

Strategies and Actions for Matching the Promise

Products and Experiences

1. Encourage and support a more diverse range of higher quality tourism experiences in Port Stephens that meet the expectations of the visitors now and in the future.

	Strategic Actions	Delivery Partners	Time Frame		
			Yr 1	Yr 2	Yr 3-5
1.1	Encourage operators to refresh their products and innovative in their visitor experiences	DPS, Industry Operators	✓		
1.2	Encourage and support the development of new experience, activity and attraction products around the LGA	DPS, Industry Operators, PSC	✓		
1.3	Investigate opportunity and funding for an interpretive centre for whales / dolphins.	DPS, NPWS PSC		✓	
1.4	Completion of walking trail from Fingal to Birubi Beach	NPWS, DPS		✓	
1.5	Attract major branded hotel to Port Stephens.	PSC, DPS, NSW Government			✓
1.6	Attract and encourage large signature project investment in new tourism product and infrastructure:	PSC, NSW Government, DPS		✓	✓
1.7	Develop a series of activity and experience based trails	DPS	✓		
1.8	Produce innovative product bundling/ packaging solutions.	DPS, Industry Operators	✓		
1.9	Facilitate and support development of infrastructure to allow hosting of signature events.	PSC, Event Industry Operators, NSW State Government, DPS		✓	



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Service Quality and Standards

2. Implement strategies to measure and improve service quality and standards to make Port Stephens the standout destination for customer service.

	Action	Delivery Partners	Time Frame		
			Yr 1	Yr 2	Yr 3-5
2.1	Establish a comprehensive Mystery Shopper program throughout the Port Stephens LGA:	DPS		✓	
2.2	Foster and engender a Customer service culture throughout businesses in Port Stephens.	DPS, PSC, Industry	✓	✓	✓
2.3	Implement an area wide customer service training programme	DPS, PSC	✓		

Visitor Servicing

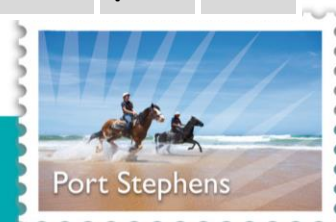
3. Develop a world-class information and inspiration systems.

	Action	Delivery Partners	Time Frame		
			Yr 1	Yr 2	Yr 3-5
3.1	Investigate opportunity to rename VIC to Visitors Inspiration Centre	PSC, DPS	✓		
3.2	Improve and increase direction signage and interpretive signage across the LGA	RMS, PSC, DPS, DNSW	✓	✓	
3.3	Develop a series of practical itineraries for visitors	DPS	✓		
3.4	Implement cultural and sales training for VIC staff	PSC, DPS	✓	✓	
3.5	Introduce CUP card facilities across LGA	DPS, Industry Operators		✓	
3.6	Provide free Wi Fi at VIC	PSC	✓		
3.7	Establish a series of roadside information bays.	PSC, RMS, DPS		✓	
3.8	Investigate the provision of portable (trailer based) information centre to supplement information bays during peak times and at key events.	PSC, DPS		✓	
3.9	Provide comprehensive and consistent to information to visitors across all platforms.	DPS	✓	✓	✓
3.10	Implement cross regional informational platforms	DPS, PSC, VEH and surrounding destinations	✓	✓	✓
3.10	Establish VIP's: Visitor Information Points; Visitor Inspiration Points and Visitor Information Portals.	DPS, PSC, VEH		✓	

Community

4. Work with the community to build a shared value of tourism industry resources and experiences.

	Action	Delivery Partners	Time Frame		
			Yr 1	Yr 2	Yr 3-5
4.1	Create a sense of place and community ownership and involvement	DPS, PSC	✓	✓	✓
4.2	Re-introduce Tourism Week	DPS, NSW		✓	



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		Government Industry Operators and surrounding destinations			
4.3	Implement a residents Ambassador program	DPS	✓		
4.4	Build an effective community communication system	DPS, PSC	✓		

DESTINATION DEVELOPMENT

Strategies and Actions for Building Capacity

Strategic Leadership

1. Within a framework of shared values, provide the leadership to guide the visitor economy on a path of world's best practice.

	Action Link to Key Strategic Priority	Delivery Partners	Time Frame		
			Yr 1	Yr 2	Yr 3-5
1.1	Develop a culture of innovation	DPS	✓	✓	
1.2	Encourage a strategic, policy based board	DPS	✓	✓	✓
1.3	Build a strong team with industry champions	DPS	✓		
1.4	Develop a closer working relationship with Council and relevant organisations to identify and champion key projects	DPS, PSC, Chambers of Commerce, VEH	✓	✓	✓
1.5	Provide structured mentoring services to facilitate new product development.	DPS	✓	✓	
1.6	Establish a visitor economy business incubator	PSC, DPS			✓
1.7	Advocate and promote adoption of the RENSW holiday letting agent Code of Conduct	DPS, Holiday Letting Agents		✓	

Corporate Structure

2. Position and enable Destination Port Stephens to be an effective, supported and proactive destination management organisation.

	Action	Delivery Partners	Time Frame		
			Yr 1	Yr 2	Yr 3-5
2.1	Implement and resource a new corporate structure to deliver the recommendations of this plan.	DPS,	✓		
2.2	Establish a Tourism Advisory Committee to liaise with council.	DPS	✓		
2.3	Investigate models to integrate membership of Business Chambers and DPS	DPS, Chambers of Commerce, PSC	✓		



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Infrastructure Development

3. Encourage and support the development and improvement of regional and local infrastructure to improve the local amenity and facilitate visitor access to and dispersal throughout the region .

	Action Link to Key Strategic Priority	Delivery Partners	Time Frame		
			Yr 1	Yr 2	Yr 3-5
3.1	Develop multi lingual signage of key at popular areas	DPS, RMS, PSC, DNSW		✓	
3.2	Implement a system of banner and flags around CBD to enhance key visitor locations	DPS, PSC, NBDC	✓		
3.3	Ensure free public Wi Fi in all CBD areas and key visitor locations	PSC, PSC	✓		
3.4	Develop a signage style guide	DPS, PSC	✓		
3.5	Facilitate infrastructure development at Anna Bay	PSC, DPS		✓	✓
3.6	Lobby RMS and Geographical Names Board for recognition of Port Stephens as a destination and for the provision of directional signage on all major roads	DPS		✓	
3.7	Activate key visitor areas to create thriving hubs for visitors and residents alike (Strategic Development Plans for each area)	DPS, PSC			✓
3.8	Build local and Port Stephens Gateway entries	PSC, DPS, RMS			✓
3.9	Expand the partnership with Newcastle to increase visitation from broader domestic and international markets	DPS, NCC, VEH		✓	
3.10	Proactively engage relevant authorities on road improvement	PSC, DPS, RMS	✓	✓	✓
3.11	Create a DPS Infrastructure Committee to engage with Council	DPS, PSC	✓		
3.12	Resolve the issues surrounding the provision of dump points and free camping.	PSC, DPS	✓		

Sustainable Development

4. Ensure the long term conservation of Port Stephen's unique natural and social assets on which the visitor economy depends by adhering to world's best practice for nature based tourism values and eco tourism principals.

	Action	Delivery Partners	Time Frame		
			Yr 1	Yr 2	Yr 3-5
4.1	Facilitate and encourage members to attain eco accreditation	DPS, DNSW	✓	✓	
4.2	Actively promote and assist local product to gain TQUAL / TIRF or similar funding for eco based projects	DPS, Industry Operators, Federal Government	✓	✓	✓
4.3	Actively encourage energy friendly developments new and existing with high energy ratings	DPS and NCC	✓	✓	
4.4	Investigate area wide energy reduction and conservation programs	DPS, PSC and industry operators		✓	



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Transport

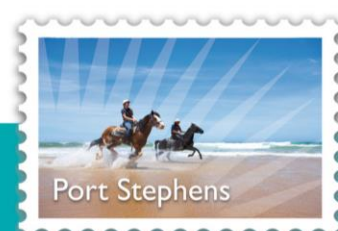
5. Work co-operatively with surrounding destinations, Local, State and Federal government departments and the business community to improve access to and within Port Stephens.

	Action Link to Key Strategic Priority	Delivery Partners	Time Frame		
			Yr 1	Yr 2	Yr 3-5
5.1	Support the use of daily coach services from Sydney to Port Stephens	DPS, Port Stephens Coaches	✓		
5.2	Investigate opportunities for daily coach service between Port Stephens and Hunter Valley	DPS, Port Stephens Coaches, HVWC, VEH		✓	
5.3	Lobby for hub and spoke transport solutions for Sydney and surrounds	VEH, DPS			✓
5.4	Improve Port Stephens bus connections with rail services	DPS, VEH		✓	
5.5	Improve connections with interstate coach services (particularly for backpackers)	DPS, Port Stephens Coaches, VEH			✓
5.6	Investigate the opportunity for dedicated linkages between attractions, activities and accommodation	VEH, DPS, PSC and surrounding destinations			✓
5.6	Work with industry to facilitate the provision of Ferry service between Tilligerry and Tomaree	DPS and cruise operators	✓		
5.7	Address parking issues in Nelson Bay Improved vehicle parking Coach parking on the waterfront	PSC, DPS		✓	
	Work with PSC to find solutions for improved vehicle parking across key visitor locations	PSC, DPS			✓
5.8	seek to have Port Stephens included as a destination on digital maps and GPS systems			✓	

Research and Measurement

6. Design and implement advanced information gathering and interpretation systems to provide a sound basis for strategic decision-making .

	Action	Delivery Partners	Time Frame		
			Yr 1	Yr 2	Yr 3-5
6.1	Develop and implement an effective industry measurement system	DPS, VEH and surrounding destinations		✓	
6.2	Seek collaborative regional statistics recording solution	VEH, DNSW, DPS		✓	
6.3	Continue TRA subscription to NVS/IVS Data	DPS	✓		
6.4	Undertake HVRF Omnibus Survey where available	DPS	✓	✓	
6.5	Collaborate with business chambers on joint economic activity research and measurement	DPS, Chambers of Commerce, PSC			✓
6.6	Implement visitor satisfactions surveys	DPS	✓		



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6.7	Provided snapshots and interpreted raw data at high level for industry	DPS	✓		
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DESTINATION MARKETING

Strategies and Actions for Building Motivation

Branding

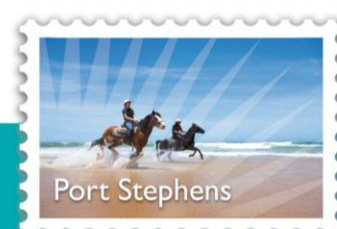
1. Build a strong, sustainable and collective brand strategy to establish pride, positioning, competitive advantage, brand platform elements and a destination promise.

	Action Link to Key Strategic Priority	Delivery Partners	Time Frame		
			Yr 1	Yr 2	Yr 3-5
1.1	Undertake a comprehensive Port Stephens branding project to identify brand essence, values, emotions and depictions.	DPS	✓		
1.2	Develop Brand Style Guide for use and implementation by council, industry partners, business and the broader community	DPS	✓		
1.3	Rename Newcastle Airport to include Port Stephens – Newcastle Airport	DPS, PSC, NCC, Newcastle Airport	✓		
1.4	Lobby Airlines to include Port Stephens as a destination on their consumer booking systems	DPS, Airlines	✓		
1.5	Work collaboratively with Newcastle and Hunter Valley Wine Country and airline partners for joint campaigns to new destinations where brand Port Stephens is not well known including Adelaide, Perth	DPS, Airlines, surrounding destinations	✓	✓	
1.6	Develop a comprehensive library of signature experience images and video footage and make it easily available	DPS	✓		
1.7	Implement a local branding program	DPS, PSC	✓	✓	✓
1.8	Implement a branded merchandising program	DPS, PSC	✓		

Domestic Markets

2. Design and implement well researched, focused, targeted and supported domestic campaigns to raise awareness of and intention to travel to Port Stephens to meet the 2020 target of doubling overnight visitation.

	Action Link to Key Strategic Priority	Delivery Partners	Time Frame		
			Yr 1	Yr 2	Yr 3-5
2.1	Develop a long term marketing plan (2014 – 2020) with a focus on identifying key growth markets and opportunities	DPS	✓		
2.2	Continue to support The Legendary Pacific Coast	DPS, TLPC	✓	✓	
2.3	Implement a VFR strategy with residents	DPS, Residents		✓	
2.4	Develop joint campaigns with surrounding areas for new markets where brand Port Stephens is not well	DPS and surrounding		✓	✓



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	known	destinations			
2.5	Continue to implement the Port Stephens Experience Strategy	DPS, Industry Operators, DNSW	✓	✓	
2.6	Work with Cruise Hunter to maximize visits from cruise passengers	DPS, PSC, Cruise Hunter	✓	✓	✓
2.7	Encourage greater engagement and partnerships with other online booking engines, distress sites and online travel agents / aggregators (OTA's)	DPS, Industry operators	✓	✓	
2.8	Assist members in developing their own public relations kits	DPS, industry operators	✓		
2.9	Encourage more effective incorporation of National Parks experiences and marketing activities into the Port Stephens campaigns.	DPS, NPWS	✓	✓	
2.10	Adopt a destination charity	DPS		✓	
2.11	Establish a marketing committee using industry specialists to review design of yearly strategies and review yearly results	DPS	✓		

International Markets

3. Expand our successful international campaigns to further diversify in to key international markets to reduce business risk, increase cultural diversity and increase off season and mid week visitation

	Action Link to Key Strategic Priority	Delivery Partners	Time Frame		
			Yr 1	Yr 2	Yr 3-5
3.1	Focus marketing efforts on inclusion of overnight stays where possible	DPS, Industry Operators	✓	✓	✓
3.2	Include an <i>Incentive</i> segment strategy in the Marketing Plan	DPS	✓		
3.3	Provide export ready training for new and emerging product	DPS, Industry Operators, DNSW	✓	✓	✓
3.4	Develop country specific strategies for China, India, Indonesia and New Zealand	DPS		✓	
3.5	Commence destination awareness campaign in New Zealand prior to air route establishment	DPS, Industry Operators	✓	✓	
3.6	Engage members support for a unified approach to international marketing	DPS, Industry Operators	✓	✓	
3.7	Grow Sydney Surrounds and adjoining destination collaboration	DPS, surrounding destinations	✓	✓	
3.8	Facilitate development and distribution of wholesale attraction and activity passes.	DPS, partner destinations, DNSW		✓	✓
3.9	Seek EMDG or similar grant funding	DPS	✓		
3.10	Appoint dedicated inbound marketing manager	DPS	✓		



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Events

4. In partnership with PSC, continue to work with surrounding destinations and event organisers to attract and host signature events, which support and enhance the lifestyle of residents and the experience of visitors to Port Stephens.

	Action	Delivery Partners	Time Frame		
			Yr 1	Yr 2	Yr 3-5
4.1	Support PSC events team to Identify, build and attract new signature events.	PSC, DPS, DNSW	✓	✓	✓
4.2	Work with surrounding destinations to combine regional events calendars	PSC, DPS, VEH, surrounding destinations	✓	✓	✓
4.3	Review the structure of event development, marketing, procurement and management.	DPS, PSC		✓	
4.4	Increase the number, depth and dispersal of experiences around events	DPS, PSC	✓	✓	✓
4.5	Develop key adventure event with Great Lakes and Gloucester	DPS, PSC, Great Lakes and Gloucester			✓
4.6	Actively seek opportunities to grow sports tourism in Port Stephens	PSC, DPS		✓	✓
4.7	Partner with surrounding areas to attract and facilitate large-scale events.	DPS, PSC, Surrounding destinations	✓	✓	✓

Business Tourism

5. Increase the volume and yield of the group, meeting, incentive and convention market to diversify the visitor economy and provide strong foundations for future investment in facilities and products in Port Stephens.

	Action	Delivery Partners	Time Frame		
			Yr 1	Yr 2	Yr 3-5
5.1	Develop an effective and sustainable framework to grow the MICE market	DPS, Mice PS Members, VEH	✓		
5.2	Enter into strategic alliances with neighbouring destinations	DPS, VEH	✓		
5.3	Develop options and implement strategies for pre and post conference travel	DPS	✓		
5.4	Position Port Stephens as a leading regional incentive destination	DPS	✓		
5.5	Increase Mice PR and famil programme	DPS, VEH. BES, Industry Operators	✓		
5.6	Develop a strong digital positioning for MICE PS branding	DPS		✓	



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Digital Innovations

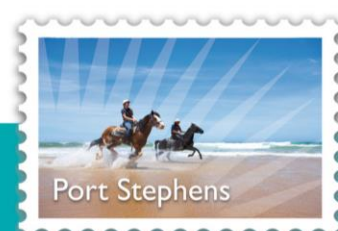
6. Adopt an innovative and extensive use of social media and other digital technology to become the most digitally capable tourism destination in Australia.

	Action	Partner	Time Frame		
			Yr 1	Yr 2	Yr 3-5
6.1	Develop yearly social media planner with key events and themes	DPS	✓		
6.2	Investigate innovative communication technologies	DPS	✓	✓	
6.3	Implement training and mentoring program for members to help in understanding and uptake of new technology	DPS, PSC	✓	✓	✓
6.4	Develop iconic social media events	DPS	✓	✓	
6.5	Source and develop a better booking system for attractions and activities	DPS, PSC		✓	
6.6	Review use of Book Easy	DPS, PSC	✓		
6.7	Improve online booking system integration at a regional level	DPS, VEH		✓	✓
6.8	Expand the breadth and depth of the consumer database	DPS	✓	✓	
6.9	Develop a digital noticeboard that residents and visitors will find valuable		✓		
6.10	Integrate holiday letting bookings in Book Easy		✓		
6.11	Build web content for cultural and heritage database		✓	✓	✓

IMPLEMENTATION AND EVALUATION

The primary aims of this Destination Management Plan are to provide an audit and health check of the tourism industry, to provide a holistic perspective of the visitor economy and to identify key directions that the industry needs to take in order to grow and prosper. A detailed and complete “tactical” action plan will need be developed once the report is adopted.

The recommendations in this report will be given responsibilities and completion dates and will form the basis of monthly Destination Port Stephens board papers to ensure progress.



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Supporting Documentation and
Appendices

1. PATHWAYS TO SUSTAINABLE TOURISMS IN PORT STEPHENS

OBJECTIVE

To create the basis for sustainable tourism by ensuring a strategy for the long term conservation of Port Stephens's unique natural assets on which tourism largely depends, is developed.

This objective calls for a sustainable conservator-based policy through world's best practice for nature-based tourism values and ecotourism principles.

THIS WILL INVOLVE

- Pro-active advocacy to guide PSTL towards this objective...also featuring...
- Adoption and familiarity with the principles of Ecologically Sustainable Development (ESD), as in the quadruple bottom-line.
- Urgent attention to the UNO's- IPCC reports on climate change and impacts on tourism including rising temperatures, sea-levels, increasing eastern sea-board summer rainfalls, and more frequent climatic storm events.
- Familiarity with the 'worst-case scenarios' of climate impacts and what these could mean for tourism.
- Pro-active policies and guidelines to achieve a fully sustainable and carbon neutral tourism industry in Port Stephens.

TO PROMOTE

- Ecologically sustainable tourism including through ecotourism accreditation.
- Passive tourism activities that avoid disturbing the local ecological balance, peace and serenity, as opposed to extreme activities/attractions.
- Vastly improved standards of recycling and waste management including greater use of sewerage pump-out facilities for vessels.
- Codes of Practice and/or Conduct to guide member companies and operators in effective self-regulation.
- Practices that clearly demonstrate commitment to conservation and the celebration of our natural heritage and environmental assets.
- Protection of natural context, actively retaining a 'sense of place'.
- Fostering appreciation of our natural assets, enhancing awareness through sustainable experiential tourism.
- A custodial role and to expand this role through co-operation with the Estuary Management Committee, Government Agencies, Marine Parks Authority, EcoNetwork.
- Optimal balance (ESD) between conservation and the commercial uses of natural assets, rather than optimal use and exploitation for economic outcomes only.
- Promoting and pro-actively seeking ethical and socially responsible investment for sustainable outcomes.
- The conservation components of the Marine Park and passive tourist activity within marine sanctuaries.



2. ACTIVITIES UNDERTAKEN BY VISITORS TO PORT STEPHENS 2012 (SOURCE NVS)

	Visits (,000)	%
All destination activities		
Eat out at restaurants	393	61%
Go to the beach (including swimming)	349	55%
Visit friends and relatives	228	36%
General sight seeing	216	34%
Go shopping (pleasure)	210	33%
Pubs clubs discos etc	158	25%
Go fishing	86	13%
Going to markets (street, weekend or art craft) (2000 onwards)	75	12%
Visit national parks or State parks	72	11%
Bushwalking or rainforest walks (2000 onwards)	72	11%
Picnics or BBQs	56	9%
Charter boat, cruise or ferry ride	39	6%
Play other sports	38	6%
Go whale or dolphin watching (in the ocean)	37	6%
Exercise, gym or swimming at a local pool, river or creek	33	5%
Visit botanical or other public gardens	29	5%
Other outdoor activities (e.g. horse riding, rock climbing, bungee jumping, four wheel driving or reef walking etc)	28	4%
Visit wineries	26	4%
Go cycling (from 2006 onwards)	25	4%
Play golf	24	4%
Water activities or sports (2004 onwards)	24	4%
Visit museums or art galleries	21	3%
Attend festivals or fairs or cultural events	18	3%
Movies or videos	18	3%
Go on a daytrip to another place	16	3%
Visit history, heritage buildings sites or monuments	15	2%
Visit wildlife parks, zoos or aquariums	15	2%
Visit farms	14	2%
Visit amusements or theme parks	10	2%
Visit industrial tourism attractions (eg breweries mines)	10	2%
Attend an organised sporting event	10	2%
Surfing (2004 onwards)	9	1%
Attend movies or cinema (2007 onwards)	9	1%
Go on guided tours or excursions	5	1%
Snorkelling (2003 onwards)	2	0%
Attend theatre concerts or other performing arts	2	0%
Visit art or craft workshops or studios	2	0%
Experience aboriginal art or craft and cultural displays	2	0%
Visit a health spa or well-being centre (2003 onwards)	2	0%
Visit or stay on an island (2003 onwards)	1	0%
Visit casinos	-	0%
Scuba diving (2000 onwards)	-	0%
Other	1	0%
None of these	42	7%
Activities not asked	2	0%
Total	640	



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3. INTERNATIONAL ONLINE BOOKINGS 2009-2012 (SOURCE BOOK EASY)

Country	Booking Value			Number of bookings		
	2009	2011	2012	2009	2011	2012
Argentina	0.0%	0.0%	0.1%	0.0%	0.1%	0.2%
Austria	0.4%	0.7%	0.0%	0.7%	1.0%	0.0%
Belgium	0.3%	0.3%	0.3%	0.2%	0.6%	0.3%
Brazil	0.0%	0.2%	0.1%	0.0%	0.3%	0.2%
Canada	3.8%	3.9%	4.1%	4.8%	4.4%	3.7%
Chile	0.0%	0.2%	0.1%	0.0%	0.1%	0.2%
China	0.5%	0.6%	1.5%	0.7%	0.6%	1.6%
Colombia	0.0%	0.4%	0.4%	0.0%	0.6%	0.4%
Croatia	0.0%	0.0%	0.2%	0.0%	0.0%	0.1%
Cyprus	0.3%	0.0%	0.0%	0.2%	0.0%	0.0%
Czech Republic	0.0%	0.2%	0.2%	0.2%	0.2%	0.3%
Denmark	2.7%	2.3%	3.6%	1.9%	2.2%	2.7%
England/UK	33.4%	27.0%	12.2%	26.3%	22.9%	14.3%
Finland	0.0%	1.3%	0.6%	0.0%	1.2%	0.6%
France	2.4%	4.1%	4.4%	2.7%	5.2%	5.7%
French Polynesia	0.0%	0.0%	0.6%	0.0%	0.0%	0.2%
Germany	8.4%	12.8%	12.9%	13.3%	16.0%	14.6%
Hong Kong	4.5%	2.9%	3.9%	4.3%	2.7%	3.9%
Hungary	0.0%	0.2%	0.2%	0.0%	0.2%	0.1%
Iceland	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
India	0.3%	0.7%	1.3%	0.2%	0.6%	0.7%
Indonesia	0.2%	0.8%	0.2%	0.2%	0.3%	0.2%
Ireland	1.4%	1.6%	1.4%	1.4%	1.9%	1.5%
Israel	0.3%	0.8%	0.4%	0.7%	0.9%	0.6%
Italy	0.4%	1.5%	1.1%	0.5%	1.4%	1.5%
Japan	0.9%	0.9%	0.8%	1.4%	1.2%	1.1%
Korea	0.0%	0.8%	0.8%	0.0%	0.9%	1.0%
Malaysia	0.4%	1.1%	1.3%	0.5%	0.8%	1.0%
Malta	0.1%	0.0%	0.0%	0.2%	0.0%	0.0%
Netherlands	6.6%	4.1%	3.7%	5.3%	5.3%	4.3%
New Caledonia	0.2%	0.1%	0.2%	0.2%	0.1%	0.2%
New Zealand	9.0%	8.4%	2.5%	8.7%	5.5%	2.7%
Norway	0.4%	0.5%	0.1%	0.2%	0.5%	0.1%



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	Booking Value			Number of bookings		
Other Country...	1.6%	0.8%	0.3%	0.5%	0.7%	0.3%
Philippines	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%
Poland	0.2%	0.1%	0.2%	0.2%	0.1%	0.3%
Portugal	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%
Russia	7.8%	0.1%	0.1%	9.7%	0.1%	0.3%
Saudi Arabia	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Singapore	0.0%	5.6%	8.5%	0.0%	5.6%	8.3%
Slovenia	0.2%	0.1%	0.0%	0.2%	0.1%	0.1%
South Africa	0.5%	0.0%	0.6%	0.5%	0.0%	0.3%
South Korea	0.0%	0.0%	0.2%	0.0%	0.0%	0.3%
Spain	0.0%	0.6%	0.5%	0.0%	0.5%	0.6%
Sri Lanka	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%
Sweden	3.7%	1.9%	1.0%	1.7%	1.5%	1.3%
Switzerland	2.5%	6.3%	4.7%	4.3%	7.1%	6.2%
Taiwan	0.0%	0.7%	0.4%	0.0%	0.5%	0.4%
Thailand	0.2%	0.5%	0.2%	0.5%	0.6%	0.3%
Turkey	0.0%	0.1%	0.0%	0.0%	0.2%	0.0%
UAE	0.3%	0.0%	0.3%	0.2%	0.1%	0.3%
USA	5.7%	4.2%	4.5%	6.5%	5.0%	5.2%
Vietnam	0.2%	0.3%	0.0%	0.2%	0.1%	11.8%
Unaccounted	0.0%	0.0%	19.7%	0.0%	0.0%	0.0%
Percentage of total bookings	7%	12%	13%	6%	15%	16%



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4. POPULAR DIVE SITES IN AND AROUND PORT STEPHENS

Shore Dives	
Halifax Park	Nelson Bay. One of the best shore dives in NSW, dominated by boulders and sea urchins in the shallow giving way to sponge gardens from about ten meters.
Fly Point	Nelson Bay. A maximum depth of 18m where you dive among a number of ledges. Hidden under and among the ledges are schools of fish. Under threat from sand encroachment.
The Pipe Line	Nelson Bay. A must see for macro divers and keen photographers with a maximum depth of 16m. Small colonies and eco systems of fish, nudibranch and seahorses
Little Beach	Nelson Bay: A suitable macro and diver training site dived at high tide
Boat Harbour	Boat Harbour: A sheltered beach entry giving access to underwater rock formations and kelp beds that shelter a host of marine life. A popular training site.
Boat Dives	
Broughton Island	<p>Broughton Island is located about 20 kilometres north of Port Stephens and is home to a large number of magnificent dive sites. One of the great attractions is the large colony of grey nurse sharks.</p> <p>Looking Glass. A large chasm through the middle of the island which opens out into a natural fishbowl with grey nurse sharks and large rays and baitfish! Maximum depth of 18 metres inside.</p> <p>Looking Glass Wall. An abundance of fish life along a sheer wall from 15-45 metres. A great dive for advanced divers and sometimes home of the rare eastern blue devil fish.</p> <p>Shark Gutters. A spectacular maze of narrow gutters brimming with grey nurse sharks from pups to large males. Maximum depth of 14 metres.</p> <p>North Rock. A kelp covered bombie leading down to fingers of gutters teaming with fish and sponge gardens. Depth from 5 metres to 22 metres.</p> <p>Cod Rock. An unusual looking lava tube amongst gutters, crevices and caves which are home to fish and eels.</p> <p>Elephant Rock. A kelp garden ridge reaching Red Indian fish, Ornate Wobbegongs, Hinge-backed Shrimp, Pairs of Old Wives, a variety of Wrass. This is a great naturalist dive to identify a variety of species.</p> <p>Spider Cave. A cave made up of two parallel tunnels typically home to cuttlefish, Port Jackson sharks as well as some Wobbegong sharks.</p> <p>Bubble Cave. At the opening of Esmeralda Cove, the Bubble Cave extends back into the island with a depth of 5 to 16 metres.</p>
Fingal Island	<p>Fingal Sponge Gardens. This is one of the closer islands to Nelson Bay with drop offs, pinnacles and magnificent sponge gardens. Fish and invertebrate life is extensive, ranging from tiny nudibranches to schooling baitfish, morwong, friendly grouper and turtles.</p> <p>The Pinnacle. As the name suggests a large pinnacle down to 35 metres where large pelagic fish feeding in summer.</p>
Cabbage Tree Island	The waters around Cabbage Tree Island are the home the rare Donut Nembrotha, the only place in the world where this nudibranch is found.
Little Island	A gr dive site, especially for deep diving with depths over 40 metres. Little by name, large by nature with its sudden cliffs piercing down into the depths and healthy population of fish life.
Boondelbah Island	Safety Cove. Although the island offers a number of sites, Safety Cove offers a dramatic seascape. With cliffs, swim throughs, caves, and large aggressive rocks climbing through the water, often frequented by snapper and blue groper.
Wrecks	<p>The Oakland. Lies in 27 metres of water north of Cabbage Tree Island. This 154 feet long wreck has been described as a wreck sitting in the bottom of a fish tank, with her rib cage exposed and her bow and stern somewhat intact.</p> <p>The Macleay. The Macleay sank after crashing onto the rocks off Little Island in 1911 and now lies in 42 metres of water. For experienced divers looking for a deep challenge.</p>



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5. PORT STEPHENS - GREAT LAKES MARINE PARK COMMERCIAL PERMIT HOLDERS (AS AT JULY 2013)

There are a total of 81 commercial permits to operate in the Park

BOAT HIRE

Name	Location	Owner	Vessels
Peppers leisure Pty Ltd t/as	Corlette	Anchorage Marina	3 x 4.3m runabouts
BOAB Boat Hire Port Stephens	Port Stephens	Seastyle Industries Pty Ltd	1 x 5.1m & 1 x 6m runabout
BOAB Boat Hire Forster	Forster	JMK Business Solutions Pty Ltd	1 x vessel
Nelson Bay Boat Hire	Nelson Bay	P Shennan	7 x 4.3m runabouts, 1 21ft dayboat
Port Stephens Holiday Cruisers	Nelson Bay	D and M Shennan	3 x 6m half cabins, 1 x 7.7m cruiser
Soldier's Point Boat Hire	Soldier's Point	Glen Forrest	3 x runabouts, 4 x kayaks, 1 pontoon
Tea Gardens Boatshed and Hire	Tea Gardens	Clear Waters Tea Gardens Pty Ltd	7 x powered runabouts
Frothy Coffee Boat Shed	Smiths Lake	Patroy Enterprises	4 x runabouts, 10 x kayaks, 2 x canoes and 5 x catamarans
Red Sky Night	Tilligerry Creek	Kyla Brady	5 x 4.5m vessels and 1 houseboat

CHARTER FISHING

Vessel Name	Location	Owner
Calypso	Nelson Bay	T and R Dean
Capricorn	Church Point	Consulate Charter Boats Pty Ltd
Cavanbah	Forster	Forster Fishing Charters
Dr Hook	Teralba	Brad Horne Concreting Services Pty Ltd
Freedom	Kincumber	Scott Thorington
Hammerhead	Nelson Bay	Louross Pty Ltd
Inya Deams	Nelson Bay	Joel Thompson
Kunara	Nelson Bay	James Booth
Tempest	Forster	Maluja Pty Ltd (P Lovell)
MV Full Stick	Nelson bay	Tamboi Queen Cruises Pty Ltd
Sea Runner	Wamberal	Paul Minto
MV Argonaut	Tea Gardens	R Horsfield
Wright 1	Nelson Bay	Lets Go Adventures
Rush Hour	Nelson Bay	Shayne Wilson
MV Wallamba	Nelson Bay	R Horsfield
Warrigal	Nelson Bay	Andrew O'Brien
Bill Fisher	Central Coast	Ross Hunter



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CHARTER GENERAL

Vessel Name	Location	Owner
Broughton Island Explorer	Nelson Bay	Moonshadow Charters Pty Ltd
Downunder	Nelson Bay	Nick Zappis
Myall Tourer	Tea Gardens	Myall Tours Pty Ltd
Champagne on Ice	Corlette	Bailey Trust Pty Ltd Blue Water Sailing
Endless Days	Nelson Bay	J & H Morris
Downunda	Soldiers Point	Ecomarine

DIVE

Vessel	Business	Location	Owner
Avanti	Dive Forster Fisherman's Wharf	Forster	Lormine Pty Ltd
*Habana	Action Divers and Ocean Quest Fishing Charters	Tuncurry	John and Kathryn Duggan
N/a	Dive Skate and Ski	Newcastle	Glotime Pty Ltd
Tomaree, Diveaway	Lets Go Adventures	Nelson Bay	Adam Shorter/Emma Challen
Siren	Feet First	Anchorage, N Bay	Feet First Dive Pty Ltd
Tempest	Maluja Pty Ltd	Forster	P Lovell
N/a	Newcastle Dive Centre	Newcastle	Nic Rewitt
N/a	TecDivers Pty Ltd	Nelson Bay	Robert Main

DOLPHIN/CETACEAN WATCH

Vessel Name	Based at	Owner
Amaroo	Forster	W.& N. Coombe
Imagine	Nelson Bay	Big Cat South Pacific Holidays
Moonshadow 3	Nelson Bay	Moonshadow Charters Pty Ltd
Moonshadow 5	Nelson Bay	Moonshadow Charters Pty Ltd
Moonshadow 6	Nelson Bay	Moonshadow Charters Pty Ltd
MV Spirit	Nelson Bay	Tamboi Queen Cruises Pty. Ltd.
MV Surprise	Nelson Bay	Tamboi Queen Cruises Pty. Ltd.
MV Tamboi Queen	Nelson Bay	Tamboi Queen Cruises Pty. Ltd.
MV Spirit of Port Stephens	Nelson Bay	Tamboi Queen Cruises Pty. Ltd.

DOLPHIN SWIM

Name	Location	Owner
Dolphin Swim Australia	Nelson Bay	F Future and A Parker
Total Number of Permits		1



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FERRY SERVICES

Name	Location	Owner
Jesse	Tea Gardens	Tea Gardens Ferry Service Pty Ltd
Tea Gardens	Tea Gardens	Port Stephens Ferry Service Pty Ltd
Spirit of Tea Gardens	Tea Gardens	They Group Pty Ltd
Simba	Tea Gardens	A Thompson T/as Nelson Bay Ferry Services

FILMING/PHOTOGRAPHY

Name	Location	Owner
Sea Sik Productions	Nelson Bay	Mark McElhone

FIREWORKS

Name	Location	Owner
Kaboom Fireworks	Millers Forest	Milton Skinner

FISHERMAN'S CO-OPS

Name	Location	Manager
Commercial Fisherman's Co-op	Nelson Bay, Tea Gardens	W Pearce

FISH FEEDING

Name	Location	Owner
Ardent Leisure D'albora Marina	Nelson Bay	d'Albora Marina

FISHING SCHOOLS

Name	Location	Owner
Scho's fishing school	Pindima	Anthony Schofield

HOUSEBOATS

Business Name	Vessel	Location	Owner
Casablanca at Little Beach	Zulu	D'Albora	G Carruthers
Casablanca at Little beach	African Queen	D'Albora	L Hand
Luxury Houseboat Hire	Virgo, Pisces, Gemini	Buledelah	C and S Harlor

JETSKI

Name	Location	Owner	Vessels
Nelson Bay Jetski hire – for unlicensed riders	Nelson Bay	N Zappis	Maximum 10 jetskis and support vessel
Nelson Bay jetski hire – for licensed riders	Nelson Bay	N Zappis	Maximum 10 jetskis and support vessel



KAYAKING

Name	Location	Owner	Vessels
Port Stephens Eco Sports	Nelson Bay	Michael Hogg	15 kayaks, 20 persons
Scho's Fishing School	Pindimar	Anthony Schofield	7 x kayaks
Offroad Adventures t/a Lazy Paddles	Tea Gardens	Annette Schorah and John Liddell	kayaks
Life's an Adventure	North Narabeen	Red Presents Pty Ltd	8 x double 1 x single kayak
Out and About Adventures Pty Ltd	Wangi Wangi	Out & About Adventures	9 x 6m, 1 x 5.4 kayak
Southbound Adventures	Albion Park	Southbound Adventures	9 x 4.3, 9 x 6m kayaks
Xterra Adventures	Erina	Glen Hartley	10 x 7.3, 3 x 5.8m kayaks

MOORING AND MARINE INFRASTRUCTURE

Name	Vessels	Location	Owner
Myall Moorings Pty Ltd	Chainsaw, Hacksaw	Nelson Bay	James gear
On Water Marine services	On water marine services	Williamtown	On Water Marine Services Pty Ltd Des Maslen
Statewide Marine	PDI	Fullerton Cove	Statewide Marine Pty Ltd (Ken Latham)

PARASAILING

Vessel	Location	Owner
U with me	Nelson Bay	Jamala Charters Pty Ltd Ian Cutbush

STAND UP PADDLE BOARDS

Name	Location	Owner
Core four stand up paddle boards	Nelson Bay	Richard Finlay Jones
The SUP Club Port Stephens	Dutchmans Beach	Zivana Crestani

SURF SCHOOLS

Name	Location	Owner
Port Stephens Surf School	Fingal Bay	Luke Michalak
Surface Surf School	Bluey's, Boomerang, No. 1 beaches	G Hughes

THRILL RIDES

Name	Berth	Owner
Thundaraft	Nelson Bay	Jamala Charters t/a Thundaraft
Menace	Nelson Bay	Nick Zappis t/a Nelson Bay Parafly and Aquatic Tours



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6. NATIONAL PARK ASSETS IN PORT STEPHENS (SOURCE NPWS)

National Park	Location/destination	Recreation activity (& setting)	Access
Tomaree NP: ocean beaches, coastal bushwalking, world class coastal lookout	Tomaree Head summit walk	Walking track and headland lookout	Parking at end of Shoal Bay Rd.
	Fort Tomaree walk	World War II gun emplacements	
	Point Stephens Lighthouse and Fingal Island	Historic site (Lighthouse) and walking.	Boat access or occasional walking access via Fingal Beach. CAUTION: Unreliable and dangerous walking access across Fingal Spit.
	Wreck Beach walk	Short bush walk, swimming, beach walking (ocean beach)	Access via Tomaree Rd.
	Fishermans Bay foreshore	Picnic area, walking, kayaking (coastal rocky bay).	Via Pacific Street, Fishermans bay. Parking available.
	Box Beach	Short bush walk, swimming, surfing, beach walking (ocean beach).	Parking; 2wd access via Tomaree Rd.
	Zenith Beach	Swimming, beach walking (ocean beach)	Parking at end and off Shoal Bay Rd.
	Big Rocky	Fishing and walking (Access to Tomaree coastal walk and coastal forest and rocky shore).	Via Gan Gan Rd.; 4wd access to parking at Big Rocky;
	Samurai Beach	Swimming, surfing, beach fishing, walking.	4wd track via Gan Gan Rd.
	One Mile Beach	Swimming, surfing, beach fishing, walking.	2wd parking; Gan Gan Rd.
	Morna Point	Bush walking (Coastal forest and rocky shore).	Via Blanch St, Boat Harbour; Parking available.
	Kingsley Beach	Coastal rocky shore and beach	Via Kingsley Drive, Boat Harbour. Parking available.
	Little Kingsley	Bush walking (Coastal forest and rocky shore).	Via Fishermans bay Rd., Fishermans Bay.
	Boulder Bay	Walking track to coastal, rocky shore.	Hiking track; < 1hour.
Worimi Conservation Lands (WCL) Unique Aboriginal cultural landscape (Worimi ownership and joint management with NPWS),	Stockton Beach	4wding (beach and dunes in Recreation Vehicle Area)	Access via Gan Gan road (Anna Bay) & Lavis lane (Williamstown); WCL beach vehicle permit required.
	Stockton Beach	Horse riding on beach	
	Stockton beach	ATV/quad biking in Recreation Vehicle Area (designated area of beach and dunes; commercial tours available).	Designated area of beach and dunes; access via Lavis lane at Williamstown; WCL recreation vehicle permit required.

National Park	Location/destination	Recreation activity (& setting)	Access
	Stockton Beach	Commercial tours (sand-boarding, horse riding, 4wd tag-along tours)	Various operators
Seaham Swamp NR	Seaham Swamp NR BiRd Observation Tower	Freshwater wetland/lagoon	Sealed road
	Seaham Swamp NR Quarry	historic site	Sealed road
	Seaham Swamp NR Toms Cottage Track	historic site and short walk (>1km)	Sealed road
	Little Mountain Camping Area	Camping and picnic area on Karuah river	Hobarts Rd (unsealed) off Bucketts Way
	Double Wharf Day use Area	Picnic/day use area on Karuah river	Hobarts Rd (unsealed) off Bucketts Way
	Tattersals Camping Area	Camping and picnic area on karuah river	Hobarts Rd (unsealed) off Bucketts Way
Karuah NP riverside camping, fishing	The Common - Wallaroo NR	Day use area	Lone Pine Rd (unsealed) off Italia Rd.
	Road and trail network	Horse riding on road and trail network	
	Trail network.	Horse riding on trail network	Medowie Rd.
Wallaroo NP bush walking, horse riding and mountain biking	Broughton Island	Camping area (basic)	5 sites; pre-paid booking.
Medowie SCA bush walking, horse riding and mountain biking	Broughton Island	Day use (via commercial operator)	
Myall Lakes NP	unique offshore island camping		

7. PORT STEPHENS BEACHES AND BAYS

PORT STEPHENS BEACH & BAY GUIDE

		LIFE GUARDS	4WD*	DOGS	ACTIVITIES	FACILITIES
TOMAREE PENINSULA						
MAP 2 N8	Bagnalls Beach - Between Dutchies & Corlette, the foreshore reserve is an approved 'dog on/off lead' area.	X	X	✓	Swimming, kite surfing, picnic.	BBQ, car park, playground, showers ^g , toilets.
MAP 2 K14	Birubi Beach - Located at the eastern end of Stockton Beach.	✓	X	▲	Swimming, surfing, fishing picnic.	Playground, toilets, skate park, dogs on lead in park only.
MAP 2 N15	Boat Harbour - Ocean beach ideal for children.	X	X	X	Swimming, fishing, picnic.	BBQ, beach boat ramp, shop, showers ^g , disable toilets.
MAP 2 R8-10 M15	Box, Wreck, Zenith Beaches Kingsley Beach - National Park.	X	X	X	Swimming, surfing, whale & bird watching.	Car park at Kingsley, Zenith & Box. Wreck Beach not easily accessible.
MAP 2 M8	Corlette - Conroy & Corlette Parks.	X	X	X	Swimming, picnic.	BBQ, car park, playground, showers ^g , toilets.
MAP 2 Q8	Dutchmans Beach - Quiet calm waters.	X	X	X	Swimming, picnic, walking track.	BBQ, car park, playground, toilets.
MAP 2 R11	Fingal Bay - Surf beach, ideal for families. Walk to Barry Park.	✓	X	X	Swimming, surfing, fishing, Lighthouse, picnic.	BBQ, beach boat ramp, car park, shop, playground, shelter, showers ^g , toilets, cycle path.
MAP 2 L15	Fishermans Bay - Anna Bay.	X	X	X	Swimming, picnic.	Beach boat ramp, toilets.
MAP 2 P8	Fly Point - This aquatic reserve is a haven for divers. Shady grassed areas.	X	X	X	Snorkeling, diving, fish feeding, picnic, walking track through Native Flora Gardens.	Amphitheatre, BBQ, car park, shelter, toilets & skate park nearby.
MAP 2 P7	Little Beach - Suitable for family and social club gatherings. Gentle waters, ideal for young children.	X	X	X	Swimming, Lighthouse, picnic.	BBQ, boat ramp, car park, shop, playground, public jetty, showers ^g , toilets & play area for the disabled.
MAP 2 P8	Nelson Bay Foreshore - Perfect for paddling and relaxing. Located in the heart of Nelson Bay.	X	X	X	Swimming, picnic.	Metered car parking, play equipment, shop, disabled toilets, hire facilities (paddle boats).
MAP 2 N14	One Mile Beach - With no buildings on the beach, One Mile is the most natural beach in Port Stephens.	✓	X	X	Swimming, surfing, fishing, walking track, picnic.	BBQ, car park, kiosk, toilets, showers ^g , learn to surf school.
MAP 2 L9	Salamander Bay - Bob Cairns, Joe Redman, Roy Wood Reserves.	X	X	▲	Swimming, picnic.	BBQ, car park, playground, showers ^g , toilets, NOT all facilities at all reserves.
MAP 2 N13	Samurai Beach - Surf Beach.	X	✓	X	Swimming, surfing, fishing, 4WD.	Clothes optional.
MAP 2 Q8	Shoal Bay - Spectacular view of the Heads.	X	X	X	Swimming, fishing, picnic.	BBQ, car park, hire facilities (sail boats), shop, public jetty, shelter, showers ^g , toilets.
MAP 2 K6	Soldiers Point Marina - THE place for sunsets.	X	X	X	Swimming, fishing, picnic.	Boat ramp, car park, disable toilets.
MAP 2 H14	Stockton Beach - Surf beach. Largest mobile sand mass in NSW.	X	✓	✓	Swimming, picnic, surfing, fishing, 4WDing, Sygna wreck.	Car park, Kiosk, disable toilets, surf club, learn to surf school.
MAP 2 J6	Sunset Beach - Soldiers Point.	X	X	X	Swimming, fishing, picnic.	BBQ, car park, playground, public jetty, showers ^g , toilets.
MAP 2 J10	Taylor's Beach - Away from the crowds.	X	X	X	Swimming, fishing, picnic.	BBQ, beach boat ramp, car park, playground, public jetty, toilets.
MAP 2 K8	Wanda Beach - George Res Western end of Salamander Bay.	X	X	X	Swimming, picnic.	BBQ, car park, playground, showers ^g , toilets.
TILLIGERRY PENINSULA						
MAP 2 I10	Lemon Tree Passage	X	X	X	Swimming, fishing, picnic.	Enclosed swimming area, BBQ, boat ramp, car park, shop, playground, public jetty, shelter, showers ^g , toilets.
MAP 2 H9	Mallabula	X	X	✓	Swimming, fishing, picnic.	BBQ, high tide boat ramp, car park, playground, shelter, shower ^g , toilet.
MAP 2 F9	Tanilba Bay	X	X	X	Swimming, fishing, picnic.	BBQ, boat ramp, car park, playground, shelter, toilet.
KARUAH						
MAP 2 D2	Longworth Park	X	X	X	Swimming, fishing, picnic.	Covered BBQ, public jetty, disable toilets, enclosed baths.

Care should be taken when swimming or fishing. Strong rips and undercurrents can occur.

■ **Birubi Beach & Fingal Beach** Monday to Friday 10am - 5pm, Saturday to Sunday 9am - 5pm, Christmas School Holidays Monday to Sunday 9am - 6pm.

One Mile Beach Monday to Sunday 10am - 5pm, Christmas School Holidays Monday to Sunday 9am - 6pm. 2013 Patrols conclude late April and recommence late September. Further information please contact the Visitors Information Service.

▲ Allowed in certain conditions. * Permit required for all 4WD. # Cold showers.



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8. TOURS, ATTRACTIONS, RESTAURANTS AND CLUBS (SOURCE: DESTINATION PORT STEPHENS MEMBERSHIP AUDIT)

TOURS

Business	Location	Vehicles	Seats	Boards	min pax	max pax	Ratio	Comments
4WD Tag-Along & Passenger Tours	Anna Bay	2x Landcruisers	14	30	2	14		Tours
		Tag-Along	12 Tagalong				1:6	
4WD Tours R Us	Williamtown / Anna Bay	30 Seater 25 seater 14 seater 4x 11 seater 6 seater	119	200	2	Unlimited	na	Sygna and Beach and Dune operates from Lavis Lane. Sandboarding operates from Anna Bay end.
Port Stephens 4WD Tours	Anna Bay	4x Coaster Bus (21) 4x Landcruisers (7)	112	220	Sandboarding 1 Sygna 4 Beach & Dune 4	S/boarding unlimited Sygna 16 Beach & Dune 42	1:30	
Sand Dune Safaris	Williamtown / Anna Bay	1x Coaster Bus (21) 1x Landcruisers (7) 2x Hummer (13) (1x Coaster Bus Road Only)	54	130	Sandboarding 1 Sygna 4 Beach & Dune 4	Sandboarding unlimited Sygna 55 Beach & Dune 55	1:30	

Business	Location	Horses	Seats	min pax	max pax	Ratio	Comments
Sahara Horse Trails & Farmstay	Anna Bay	20	6 Beach bush	14 1 Beach & Bush	6 Beach 12 Bush	1:6	

Business	Location	Camels	Seats	min pax	max pax	Ratio	Comments
Oakfield Ranch Camel Rides	Anna Bay	20	1A per Camel & 1C per Camel Ad per Camel	2	7	Nil	

Business	Location	Helicopters	Seats	min pax	max pax	Ratio	Comments
Newcastle Helicopters	Nelson Bay / Williamtown	Robinson R22	1				
		Robinson R44	3				
		Bell 206 JetRanger	4				
		Eurocopter BO105	4 to 5				
		Eurocopter AS350 B3 Squirrel	5				

Business	Location	Bikes	Seats	Boards	min pax	max pax	Ratio	Comments
Quad Bike King Pty Ltd	Williamtown / Anna Bay	120	60	-	2	60	Nil	Also runs Sygna Tour 3 Vehicles Max 80 Min 2 pax
Sand Dune Adventures	Williamtown / Anna Bay	30	20	10	2	60	2:10 3:15 4:20	Sandboarding & Aboriginal Culture available on Tours
Hunter & District Excursions (HADES)	Various	1x Coaster Bus	21	-	4	21	Nil	Available for Day Night Charters

ATTRACTIONS: LAND BASED

Business	Location	Hours Open	Seasonal Hours	Type	Activity and # of activities	max pax	min pax	Parking	Entry fee	Comments
Australian Shark & Ray Centre	Bobs Farm	Every Day 9 - 5pm	No	See & Do	Hands on experience Shark & Ray feeding	150	20	Car/Bus	Yes Adults \$19.50	
Fighterworld	Williamtown	Daily 10 - 4pm except Xmas Day	No	exhibition	Café Hands on experience	100	1	car/bus	Yes Adults \$12	
Go Karts Go Aust	Bobs Farm	Daily 9 - 5pm except Xmas Day	No	activity	Go Karting	100	10		Yes Varies	

Business	Location	Hours Open	Seasonal Hours	Type	Activity and # of activities	max pax	min pax	Parking	Entry fee	Comments
Hunter Region Botanic Gardens	Heatherbrae	Daily 9 - 4pm Closed Xmas, Boxing & Good Friday	No	exhibition	Café Garden displays Picnic area	100	2	car/bus	Free entry Parking charge	Maximum 50 pax with food
Medowie Macadamias	Medowie	7 days 9 - 5pm	No	Exhibition	Café Tours of plantation	50	10	car/bus	Free tours	Tours only for organised groups. Best time for tours May to Oct.
Murray's Brewery	Bobs Farm	10 -5.30pm except Xmas Day	no	See & Do	Brewery Tours Restaurant	300	30	car/bus	Free	under 30 pax, order off menu
Oakvale Farm & Fauna World	Salt Ash	10 - 5 everyday except Xmas	No	activity exhibition see & do	Animal feeding Picnic area Reptile show Childrens playground	na	na	car/bus	Yes Adults \$20	no guided tours
Port Stephens Community Arts Centre	Nelson Bay	7 days 10 - 4pm	No	exhibition	Art & Craft Exhibitions	150	1	car / bus	Free	
Super Strike Salamander Bay	Salamander	Sun - Thurs 9 - 10pm Fri & Sat 9 - 11pm	No	Activity	Bowling	120	10	car/bus	Yes Adult \$13	
Tilligerry Habitat Association	Tanilba Bay	Guided Walks 10.30 & 2pm by arrangement Mon, Tues, Thurs, Fri 8-3 Wed 9-2.30 Sat, Sun 9-3 Closed Xmas Day	No	Activity	Guided Walks	60	2	car/bus	Yes Adults \$10	accredited information centre

Business	Location	Hours Open	Seasonal Hours	Type	Activity and # of activities	max pax	min pax	Parking	Entry fee	Comments
Toboggan Hill Park	Nelson Bay	7 days 10 - 5pm Summer 10 - 4pm Wed to Sunday Winter	Yes	Activity	Tobogganing Ice Skating rock climbing Various activities	100	8	car/bus	Yes Adult \$8	due to the various attractions groups can rotate
Tomaree Aquatic Centre	Nelson Bay	Mon - Fri 5.30 - 5pm Weekends & Public Holidays 9-5	Yes	Activity	Swimming Water Slide	unlimited	1	car/bus	\$4.50 over 3yrs under 3 FREE	
Holberts Oyster Supplies	Salamander	Mon - Fri 7 - 5pm Weekends 9-5pm Every day except Xmas Day	No	Exhibition	Public & Wholesale Picnic Area	na	na	car / bus	Free	

ATTRACTIONS: WATER BASED

Business	Location	Vessels	Max with Food	Survey In	Survey Out	Boomnet	Catering	Notes
Blue Water Sailing	Corlette		20	20	10	no	yes	Fully Licensed- Sailing- Not restricted to Port Stephens - Regatta up to 120 pax
Dolphin Swim Australia P/L	Nelson Bay				40			20 swimmers & 20 observers
Imagine Cruises	Nelson Bay	Imagine	40	59	48	yes	yes	snorkelling can cater for 47 passengers
Endless Days			12	12	12	no	yes	
Moonshadow Cruises	Nelson Bay	M3	65	100	75	yes	yes	
		M4	124	255	n/a	yes	yes	Newcastle
		M5	180	300	200	yes	yes	
		M6	120	258	200	yes	yes	booth seating

Business	Location	Vessels	Max with Food	Survey In	Survey Out	Boomnet	Catering	Notes
		Tender						12 seats to transfer
Nelson Bay Charters -	Nelson Bay	MV Wallamba	n/a	n/a	n/a	no	no	ferry to Tea Gardens
Port Stephens Ferry Services	Nelson Bay	Jessie	n/a	70	n/a	no	no	
		MV Tea Gardens	n/a	120	n/a	no	no	ferry to Tea Gardens
Tamboi Queen Cruises	Nelson Bay	Tamboi Queen	no	125	no	yes	no	catering by outside source
		MV Surprise	55	127		yes	yes	
		MV Spirit	casual 55	148	80	yes	yes	
		MV Spirit of Port Stephens	casual 90	140	120	yes	yes	
		Investigator	0	9	9	no	no	tender for transfer
		Full Stick		12	12	no	no	deep sea fishing
Port Stephens Watersports	Nelson Bay	Parasailing	n/a	12	no	n/a	n/a	
		Thunderaft	n/a	12	12	n/a	n/a	
		New Boat	30	40	no	no	yes	
			# Nelson Bay	# Shoal Bay	Max No for mixed activities	Max No Tours	Min No Tours	
Port Stephens Eco Sports	Nelson / Shoal Bay	Single Kayak	4	3	30	12	2 day Tours	increasing fleet for summer 2014
		Double Kayak	7	3			4 Sunset Tours	
		Standup Boards	8					
			Boards		Max No	Min No		

Business	Location	Vessels	Max with Food	Survey In	Survey Out	Boomnet	Catering	Notes
Port Stephens Surf School		Learn to Surf	100		\Unlimited	2		Large groups can be broken into smaller groups and activities rotated
		Standup Boards	5		less than 10	2		Only licensed operator to operate in the ocean
		Surf Safety & Awareness			Unlimited	2		Fully Accredited
								Also has soft board, Body Board, beach equipment Hire
		Max Boat	Min Boat	Max Snorkelling	Min Snorkelling	Max Diving	Min Diving	
Feet First Dive	Nelson Bay	8	4	20	2	20	2	Must be able to swim. Some activities are tide dependant
Lets Go Adventures	Nelson Bay	8	2	unlimited	4			Shore and boat based dives
		20	4					
		Max Outside	Min Outside	Max Inside	Min Inside			
Hammerhead Boat Charters	Nelson Bay	8	4	18	4			
Kunara Charters	Nelson Bay	18	4					
Lets Go Adventures	Nelson Bay	6	4					
		No Runabouts	Seats	1/2 cabin	Seats	Day Boat	Seats	
Boab Boat Hire Port Stephens	Tomaree Peninsula	1	4					No license required
		No	Seats					
Power Boats		2	5					Must have a licence, can be used offshore
		1	6					Must have a licence, can be

Business	Location	Vessels	Max with Food	Survey In	Survey Out	Boomnet	Catering	Notes
								used offshore
		1	7					Must have a licence, can be used offshore
Boat Hire & Cruise Bookings Pty Ltd	Nelson Bay	10	6			2	12	No licence required
Soldiers Point Boat Hire	Soldiers Point	3	6					No licence required
		No		Pontoon Hire	Seats			
Single Kayak		3		1	10			
Double Kayak		1						
Nelson Bay Boat Hire-Pt Stephens Holiday Cruisers	Nelson Bay	7	6	3	8	1	12	No licence required

RESTAURANTS

Business	B/fast	Lunch	Dinner	T/away	Seats	BYO	Licensed	Order Off menu	Functions	Groups	Open	Style	Dietary Requests	Comments
A J's Restaurant & Function Centre	7.30 - 10	12 - 2.30	Mon-Sat 6pm till late	No	150	No	Yes	Yes	Yes up to 150pax	20 or more	7 days	Ala Carte		
Anna Bay Thai (Khaidee)	No	Yes	Yes	Yes	60	Yes	Yes	Yes	No	Yes	7 days summer 6 days winter	Thai	Gluten Free	
Depz Restaurant & Catering	7-Feb	12 noon	5.30	No	85	no	yes	Yes	Yes	Yes	7 days	Ala Carte	all	inside outside seating

Business	B/fast	Lunch	Dinner	T/away	Seats	BYO	Licensed	Order Off menu	Functions	Groups	Open	Style	Dietary Requests	Comments
Hog's Breath Café	No	Mon-Fri 11.30am-2.30pm	M-Fri 5.30-late Sat/Sun 11.30 - late	No	186	No	Yes	Yes	Yes	Yes	7 days	Ala Carte Steak	Vegetarian Options	Wheelchair access
Inner Light Tea Rooms	No	10.00am - 4.00	No	No	70	Yes	No	Yes	No	Yes	7 Days	Casual	Gluten Free	Access for disabled/ Bus Groups
Malai Thawng Thai Restaurant	No	11-3	5.30 till late	Yes	70	Yes	Yes	Yes	yes up to 70pax	Yes	7 days	Thai		
Marco's Restaurant	Yes	Yes	Yes	Yes for pizza	140	No Yes Pizzeria	Yes	Yes	Yes	Yes	7 days	Italian & Pizza		90 seats inside 50 outside
Mod Thai Food & Noodle Bar Nelson Bay	No	11-3	5.30 - late	Yes	90	Yes	No	Yes	Yes	Yes	7 days	Thai		
Shoal Bay	No	11-3	5.30 - late	yes	70	Yes	No	Yes	Yes	Yes	7 days	Thai		
Soldiers Point	No	11-3	5.30 - late	yes	80	Yes	No	Yes	Yes	Yes	7 days	Thai		
Nice at Nelson Bay	8am	Close 4pm	No	No	98	Yes	No	Yes	No	No	7 days	Ala Carte		
Sandpipers Restaurant	No	No	5.30 till late	No	55	Yes	Yes	Yes	Yes	Yes	6 days	Ala Carte	Inside & Outside Seating	
Sanook Thai Restaurant	No	11.30 Mon - Fri, Sat & Sun School	5.30 till late	Yes	80	Yes	Yes	Yes	Yes up to 80pax		7 days	Thai		

Business	B/fast	Lunch	Dinner	T/away	Seats	BYO	Licensed	Order Off menu	Functions	Groups	Open	Style	Dietary Requests	Comments
		Holidays												
Sri Malaysia	No	Tues - Sat 11.45 - 2	Sun-Thurs 5-9 Fri - Sat 5-9.30	Yes	50	Yes	No	Yes	No	Yes	7 days	Malaysian		Groups- A Choice Of Set menus
Taj Tandoori Indian Restaurant	no	9 - 5.30 Sala Shopping Centre	5.30 - late Nelson Bay	Yes	60	yes	yes	yes	Yes	Yes	7 days	Indian		Salamander Bay Takeaway
The Deck Café Restaurant	8am	12 noon	6pm	No	100	Yes	Yes	Yes	Yes	Yes	7 days	Ala Carte		
The Wood Oven	No	12-Mar	5-9	Yes	30	Yes		Yes	No	No	7 days	Pizza		
Nelson Bay Fishermans Wharf Seafoods	No	Mon-Thu 11am - 3pm Sun 11am - 3pm	Fri to Sat 11am - 8pm	Yes	50	No	No	Yes	No	No	7 days	Fish & Chips		
Amanda Douglas Catering	Yes	Yes	Yes	No	n/a	No	No	individual menu	Yes	Yes	7 Days	Catering		

CLUBS

Clubs	Location	Type of club	Holes / Greens	Buggy Hire	Activities	Food	Meeting Room / No of people	Accomm	Parking	Fee
Fingal Bay Bowls, Sports & Rec Club Ltd	Fingal Bay	Bowling	2 Grass 1 Synthetic	N/A	bowls	Yes food Yes bar		No	Car/Bus	Yes for bowls

Clubs	Location	Type of club	Holes / Greens	Buggy Hire	Activities	Food	Meeting Room / No of people	Accomm	Parking	Fee
Nelson Bay Bowling & Recreation Club Ltd	Nelson Bay	Bowling	4 Grass	N/A	bowls social days coaching	Yes food Yes bar	Yes up to 200pax	No	Car/Bus	Yes for bowls
Nelson Bay Golf Club	Nelson Bay	Golf	18,27,36	Yes	golf driving range	Yes food Yes bar	Yes up to 100pax	No	Car/Bus	Yes \$45 for 18
Seabreeze Hotel	Nelson Bay	Recreational	N/A	N/A	club facilities	Yes food Yes bar		Yes	Car	Free
Nelson Bay Diggers	Nelson Bay	Recreational	N/A	N/A	club facilities gym	Yes food Yes bar	Yes up to 600pax	No	Car/Bus	Free
Soldiers Point Bowling Club	Soldiers Point	Bowling	2 Grass 1 Synthetic	N/A	bowls coaching lessons	Yes food Yes bar	Yes 20 - 400pax	No	Car / Bus	Yes for bowls
Pacific Dunes Golf Operations	Medowie	Golf	18	Yes	golf driving range	Yes food Yes bar	Yes 40 - 70pax	Yes	Car	Yes Golf and Cart from \$70
Horizons Golf Resort	Salamanca Bay	Golf	18	Yes	golf golf lessons	Yes food Yes bar	Yes	Yes	Car / Bus	Yes \$50 for 18
The Palms Golf Course Port Stephens	Bobs Farm	Golf	9 - 18	Yes	golf	Yes food Yes bar	No	No	Car / Bus	Yes \$25 for 18
David Grahams Golf Complex	Anna Bay	Golfing range and activities	9	Yes	golf course driving range putt putt	Yes	No	No	Car	Yes

9. ATTRACTIONS AND TOURS (SOURCE: STATE TOURISM DATA WAREHOUSE MAY 2013)

The State Tourism Data Warehouse (STDW) is a database aimed at containing all available tourism product in NSW. This and other state based databases feed into the Australian Tourism Data Warehouse (ATDW) to form a comprehensive database of all tourism product in the country.

The table below lists the current entries for Port Stephens.

a) Attractions

Name	City	Category	Description
Australian Shark and Ray Centre	Bobs Farm	Amusement and Theme Parks; Animal; Zoos Sanctuaries Aquariums and Wildlife Parks;	The only place in the world where you can stand in knee deep water with a group of sharks and hand feed them!
Tailor Made Fish Farms	Bobs Farm	Animal; Building and Structure; Classes Lessons and Workshops; Dining and Eating Out; Food and Wine; Farming Food and Produce; Science and Technology;	A unique Aquaculture and Hydroponics operation providing live Barramundi to Sydney restaurants.
Hunter Region Botanic Gardens	Heatherbrae	Dining and Eating Out; Parks and Gardens;	More than 30 hectares of tranquil landscaped gardens displaying the beauty and diversity of Australian native flora
Tomaree National Park	Nelson Bay	Natural Attractions; National Parks and Reserves;	Encompasses coastal bushland, sand dunes, heathland, forests and over 20 kilometres of dramatic rocky coastline and stunning white sandy beaches.
Anna Bay Beach	Port Stephens	Natural Attractions;	The dunes behind Birubi Beach at Anna Bay constitute the largest coastal sand mass in New South Wales
Fingal Bay Beach	Port Stephens	Natural Attractions;	A near-perfect C-curve of sand that faces southeast, Fingal Bay Beach has its own island connected by a sand-spit
Relish Cafe and Catering	Salamander Bay	Dining and Eating Out;	Best Cafe Winner 2011 Annual Port Stephens Business Awards,
Body and Soul Spa Retreat	Salamander Bay	Spas and Retreats;	Located in the beautiful Oaks Pacific Blue Resort, Salamander Bay, Body and Soul Spa Retreat offers a relaxed and tranquil setting.
Oakvale Farm And Fauna World	Salt Ash	Animal; Zoos Sanctuaries Aquariums and Wildlife Parks;	Get up close and personal with the animal friends at Oakvale Farm and Fauna world.

Name	City	Category	Description
Tanilba House	Tanilba Bay	Historical Sites and Heritage Locations;	The most fascinating house in Port Stephens. Built in 1831 by Lt. Caswell using convict labour, Tanilba House is one of the oldest historical homes in Australia.
Tilligerry Habitat State Reserve	Tanilba Bay	Historical Sites and Heritage Locations; Natural Attractions;	Explore the Tilligerry Peninsula.
Dunmore Bridge over the Paterson River	Woodville	Historical Sites and Heritage Locations;	Bridges are not just functional, they can also be scenic and engineering attractions.

b) Tours/Hire

Name	City	Category
Sahara Trails Horse Riding Port Stephens	Anna Bay	Half Day or less;
Dawsons Tours	Anna Bay	Half Day or less; Tailored;
Houseboats Afloat	Lemon Tree Passage	Houseboats;
Nelson Bay Jet Ski Hire	Nelson Bay	Boats;
Moonshadow Cruises	Nelson Bay	Full Day; Half Day or less; Night;
Thundarcraft	Nelson Bay	Half Day or less;
Port Stephens Parasailing	Nelson Bay	Half Day or less;
Port Stephens 4WD Tours	Nelson Bay	Half Day or less;
Tamboi Queen Cruises	Nelson Bay	Half Day or less;
Lets Go Adventures	Nelson Bay	Half Day or less; Tailored;
Imagine Cruises - Nelson Bay	Nelson Bay	Half Day or less; Tailored;
Port Stephens Surf School	One Mile Beach	Tailored;
Blue Water Sailing	Port Stephens	Full Day; Half Day or less; Tailored;
4WD Tag-Along and Passenger Tours	Port Stephens	Half Day or less; Tailored;
Apparitions Ghost Tours	Raymond Terrace	Night;
Shoal Bay Bike Hire	Shoal Bay	Bicycles;
Sand Dune Adventures	Williamtown	Half Day or less;
Quad Bike King	Williamtown	Half Day or less; Tailored;

10. EVENTS IN PORT STEPHENS

Name of Event & Organiser	Location	Start Date	End Date	Details
Summer Festival- Bayside Funfest. BayView Group	Nelson Bay Foreshore	12th Jan	13th Jan	Market stalls, entertainment etc
Fishing Tournaments Cabo Hatterias & Billfish shootout	Victoria Parade Nelson Bay	15th Feb	17th Feb	Fishing tournament
Nautilus Boat Insurance Interclub Tournament	Victoria Parade Nelson Bay	23rdFeb 2nd March	24th Feb 3rd March	Fishing tournament
Cutting Edge Event Cutting Edge Services	Shoal Bay Beachfront adjacent to Shoal Bay Resort	12th Feb	12th Feb	Team building activities on beach
Bay Adventure Challenge Humphrey's Events	Shoal Bay	16th Feb	16th Feb	Fun run/ swim/ kayak
Nelson Bay Foreshore Festival & Indulgence Festival BayView Group	Nelson Bay Foreshore	15th Feb 22nd Feb 2nd March	16th Feb 23rd Feb 3rd March	Market stalls, entertainment etc Food & wine tasting, market stalls etc
Trailer Boat Fishing Tournament	Nelson Bay Foreshore	20th March	29th March	Tents, marquees set up on foreshore
Aboriginal Elders Olympics Worimi Local Aboriginal Land Council	Tomaree Sporting Complex	21st March	21st March	Low Impact team games
Fingal Bay Park run PARKRUN Inc	Fingal Bay Parkland adjacent to SLSC & carpark	23rd March	Ongoing- every Saturday Morning	Park run
Black Dog Ride	Fly Point Park Nelson Bay	25th March	24th March	Charity Motorcycle ride
Spear fishing Titles Newcastle Neptune's Underwater Club	Nelson Bay Foreshore	29th March	31st March	Fishing Competition
2013 Motocross Nationals Sports Marketing Australia	Barleigh Ranch, Eagleton	14th April	14th April	Motocross competition
Sail Port Stephens	Port Stephens eastern end	15th April	21st April	Sailing competition
ANZAC Day RSL Nelson Bay & Raymond Terrace	Apex Park & Raymond Terrace	25th April	25th April	ANZAC Day Commemoration Services
Lemon Jam	Henderson Park, Lemon Tree Passage	27th April	27th April	Musical Performance



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Name of Event & Organiser	Location	Start Date	End Date	Details
Knights Cup Nelson Bay Junior Rugby League	Salamander Sporting Complex	28th April	28th April	Junior Rugby League Competition
Karuah RSL Fun Run	Community Hall Grounds	5th May	5th May	Fun Run
Airforce Surf Competition	One Mile	9th	15th May	Surfing Competition
SUP Festival	Birubi & One Mile	16th May	19th May	Stand Up Paddle Board Competition
Port Stephens Triathlon Festival	One Mile	18th May	18th May	Triathlon
Karuah Blue Grass Music Festival	Karuah	18th May	18th May	Music Festival
PSBC Skatepark Winter Shakedown	Nelson Bay Skate Park	25th May	25th May	Community Art/photo/youth event
2013 Surf Lifesaving NSW IRB Championships Sports Marketing Australia	Port Stephens	7th June	9th June	SLS Championships
Bluewater Country Music Festival	Port Stephens	7th June	10th June	Tomaree Peninsula
Nelson Bay Sculpture Festival	Nelson Bay foreshore & Apex Park	6th July	14th July	Sculpture Festival
2013 Bowls NSW State Pennant Finals	Port Stephens (various bowls clubs)	12th Aug	16th Aug	Bowls championships
Port Stephens Golf Classic	Nelson Bay, Medowie and Fern Bay	Aug	Aug	Golf competition over 3 courses
Box Beach Pro	Box Beach	Aug	Sept	International body boarding competition
Shoal Bay Jazz Food and Wine Festival	Shoal Bay	7th Sept	7th Sept	Shoal Bay Resort and Spa
Asian Food Festival Mem's Soul Food	Fly Point	28th Sept	28th Sept	Multicultural food festival
Clans on the Coast	No 1 Tomaree Sports Field	15th Sept	15th Sept	Scottish/Celtic Family Festival Food & Cultural stalls
NSW Aboriginal Rugby League Knock Out	Lakeside Sports Complex	28th Sept	1st Oct	Rugby League knockout
NSW Country Baseball Championship	Tomaree Sports Complex	4th Oct	7th Oct	Baseball championships
Cricket Championships u/17 Country Championships	TBA	TBA Oct		Cricket Championship
Medowie Community Fete Medowie Lions Club	Kindkebark Oval	TBA Nov		Community Fete



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Name of Event & Organiser	Location	Start Date	End Date	Details
Tastes of the Bay	Nelson Bay D'Albora Marina	2nd Nov	3rd Nov	Food stalls and entertainment
Combined Churches Carols	Fly Point	8th Dec	8th Dec	Carols



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11. ACCOMMODATION IN PORT STEPHENS AS AT MAY 2013 (SOURCE DESTINATION PORT STEPHENS MEMBERSHIP AUDIT)

Bed and Breakfasts

	Rooms	No Pax	No Beds	Breakfast	Pool	BBQ	Parking	Location	Animals	Cost	Comments
Bobbi's at Nelson Bay	1	2	1	Yes	Yes	Yes	Yes	Nelson Bay	Yes	160 - 179	bond for animal
Larkwood of Lemon Tree B&B	3	6	3	Yes	Yes	Yes	Yes	Lemon Tree Passage		130	
Ocean Beach Bed & Breakfast	2	4	2	Yes	Yes	Yes	Yes	Shoal Bay		\$149	
Peaceful Palms B&B	2	5	3	Yes	No	Yes	Yes	Raymond Terrace		125-150	free wifi
Port Stephens Beach Break B&B	2	4	3	Yes	Yes	Yes	Yes	Anna Bay		250-380	non smoking / spa
Sea Air	1	4	1	Yes	No	No	Yes	Nelson Bay		80	
The Batch B& B	2	4	2	Yes	Yes	No	Yes	Anna Bay		225-229	

Backpackers

	Rooms	Bed	No Pax	Beds	Cabins	BBQ	Pool	Parking	Location	Bus Parking	Tent Hire	Sleeps
Melaleuca Surfside Backpackers	4	24	40	16	4	Yes	No	Yes	Anna Bay	Yes	8 tents	16
Samurai Beach Bungalows			31	26	4	Yes	Yes	Yes	Anna Bay	Yes		

Units and Cottages

	Location	Units/ Cottages	Rooms	Pax	Beds	Pool	BBQ	Parking	Animals	Comments
2 Dogs Cottages	Lemon Tree Passage	2	2 per Cottage	4 per Cottage	3 per Cottage	No	Yes	Yes	Yes	Foxtel

Bagnalls Beach Apartments	Nelson Bay	1	1x 3 bedroom	6 per unit	4	No	No	Yes	No	BYO Linen
Bali at the Bay	Nelson Bay	2	2 X 2 Bedroom	4 per Unit	2 per Unit				No	spa
No 6 Triview Unit	Nelson Bay	1	1 x2 bedroom	5 per unit	4	Y	No	Yes	No	BYO linen
Poplars Apartment	Nelson Bay	1	2 X 2 Bedroom	5 per unit	4	Y	No	Yes	No	
Port Stephens Luxury Apartments	Salamander Bay	3	2 X 2 Bedroom 1 x 3 bedroom	2 bed -4 3 bed - 5	4	Y	No	Yes	No	min 4 nights
Shearwater at Shoal Bay Guest Cottages	Shoal Bay	2	2 X 2 Bedroom	4 per Unit	2 per Unit	No	Yes	Yes	Yes	
The Anchorage Shoal Bay	Shoal Bay	2	2 X 2 Bedroom	1 unit - 6 1 unit- 5	1 unit - 3 1 unit- 2	No	No	Yes	No	non smoking
The Poplars Waterview Unit 6	Nelson Bay	1	1 x2 bedroom	6 per unit	3	Y	No	Yes	No	
Triview Units	Nelson Bay	1	1 x2 bedroom	5 per unit	3	Y	No	Yes	No	
Unit 137 Horizons Golf Resort	Salamander Bay	1	1 x2 bedroom	5 per unit	3	Y	No	Yes	No	

Motels/Hotels/Resorts

	Location	Type	Rooms/ Units	Max No Pax	Meeting Rooms	B/fast	Lunch	Dinner	Rating	Comments
Mantra Aqua Resort	Nelson Bay	Resort	110	400	no	no	no	no	4.5	self contained
The Retreat Port Stephens	Anna Bay	Resort	7 x Cabins 3 x Group	38 84	up to 100	no	no	no	no rating	not rated
Admiral Nelson Motor Inn	Nelson Bay	Self Contained	24	60	no	no	no	no	4	
Anchorage Port Stephens	Corlette	Resort	80	120	6 - 140	yes	yes	yes	4	
Central Motel	Nelson Bay	Motel	11	28	no	yes	no	no	3	

	Location	Type	Rooms/ Units	Max No Pax	Meeting Rooms	B/fast	Lunch	Dinner	Rating	Comments
Colonial Terrace	Raymond Terrace	Motel	30	10	no	yes	no	yes	3.5	
Corlette Palms Motor Inn	Corlette	Motel	13	30	no	yes	no	no	2.5	
Ibis Styles Salamander Shores	Soldiers Point	Resort	89	200	12 - 200	yes	yes	yes	3.5	
Lemon Tree Passage Motel	Lemon Tree Passage	Motel	11	42	no	yes	no	no	3.5	bowling club for meals
Marina Resort	Nelson Bay	Resort	44	220	up to 150	yes	no	yes	3.5	
Marty's at Little Beach	Nelson Bay	Self Contained	15	64	no	no	no	no	4	pet friendly
Motto Farm Motel	Raymond Terrace	Motel	80	240	2 rooms up to 120	yes	yes	yes	no rating	
Oaks Pacific Blue	Salamander Bay	Resort	126	500	up to 140	yes	yes	yes	4.5	
O'Carrolyns at One Mile Beach	Anna Bay	Self Contained	9	54	up to 30	no	no	no	3	bungalows
Penninsula Motor Inn	Nelson Bay	Motel	Standard 38 Budget 12	114 24	no	yes	no	yes	3	
Pinetrees at Port Stephens	Anna Bay	Self Contained	6	20	no	no	no	no	no rating	self contained units
Shoal Bay Resort & Spa	Shoal Bay	Resort	180	700	up to 300	yes	yes	yes	4.5	only one pool is general use
The Nelson Resort	Nelson Bay	Motel	36	122	up to 60	yes	yes	yes	4	
Wanderers Retreat	Anna Bay	Self Contained	12	46	no	no	no	no	3.5	bungalows
Birubi Beach Resort	Anna Bay	Resort	154			y	y	y	4	under construction

Serviced Apartments

	Location	Type	Rooms/ Units	Max Pax	Meeting Rooms	B/fast	Lunch	Dinner	Rating	Comments
Beaches Serviced Apartments	Nelson Bay	Self Contained	12	62	no	no	no	no	4	pet friendly
Cot D'Azur Resort	Nelson Bay	Resort	54	156	no	no	no	no	4.5	some permanent rentals
Landmark Nelson Bay	Nelson Bay	Resort	123		no	yes	yes	yes	4	
Leilani Haciendas	Nelson Bay	Self Contained	8	48	no	no	no	no	3.5	
Nelson Bay Breeze Apartments	Nelson Bay	Self Contained	40	238	no	yes	yes	yes	3.5	
Oaks Lure Serviced Apartments	Nelson Bay	Self Contained	57		no	no	no	no	4	
Shoal Bay Beach Club Apartments	Nelson Bay	Self Contained	21	126	no	no	no	no	4	pet friendly

Holiday Parks

	Location	Cabins	Caravan/ Tent Sites	EnSuite Sites	Sites - power	Sites - no power	Pool	Bus Parking	Rating	Comments
Big 4 Karuah Jetty	Karuah	20	38	0	0	10	2	no	3.5	new playground in 3 months
Big 4 Koala Shores	Lemon Tree Passage	34	43	12	0	0	1	no	4.5	river frontage
Big 4 Soldiers Point Holiday Park	Soldiers Point	20	16	6	10	0	2	yes	4	
Birubi Beach Holiday Park	Anna Bay	27	4	16	0	17	1	no	4	on beach
Fingal Bay Holiday Park	Fingal Bay	35	59	0	43	0	1	yes	3.5	On Beach
Halifax Holiday Park	Nelson Bay	34	74	0	14	0	0	no	4	on water
Island Leisure Village	Anna Bay	6	16	0	0	35	1	yes	nil	river frontage
Middle Rock Holiday Resort & Cabins	Anna Bay	30	30	0	0	83	1	yes	nil	childrens play area
One Mile Beach Holiday Park	Anna Bay	62	28	12	60	0	1	yes	4	childrens play area
Shoal Bay Holiday Park	Shoal Bay	38	81	16	26	0	0	yes	4	on water
Soldiers Point Holiday Park	Soldiers Point	34	11	0	46	0	1	yes	4	on Water

Letting Agents

Letting Agents	No of properties
Port Stephens Accommodation	232
PRD Reality	182
Winning Holidays	396
LJ Hookers	72
Ray White	21
O'Meara	180

11. ACCOMMODATION IN PORT STEPHENS (SOURCE: STATE TOURISM DATA WAREHOUSE MAY 2013)

The State Tourism Data Warehouse (STDW) is a database aimed at containing all available tourism product in NSW. This and other state based databases feed into the Australian Tourism Data Warehouse (ATDW) to form a comprehensive database of all tourism product in the country.

The table below lists the current entries for accommodation in Port Stephens.

Name	City	Category
Samurai Beach Bungalows - Port Stephens YHA	Anna Bay	Backpackers and Hostels;
The Retreat Port Stephens	Anna Bay	Cabins and Cottages;
Sandcastles Anna Bay	Anna Bay	Holiday Houses;
Bush Haven	Balickera	Cabins and Cottages;Self Contained;
Boat Harbour - Luxury	Boat Harbour	Apartments;Self Contained;
The Outlook on the Beach	Boat Harbour	Apartments;Self Contained;
Melaleuca Surfside Backpackers	Boat Harbour	Backpackers and Hostels;Wilderness Safari Retreat;
Boat Harbour Holiday	Boat Harbour	Holiday Houses;
Kookaburra Cottage Farmstay	Bobs Farm	Cabins and Cottages;Farm Stays;Self Contained;
70 Sandy Point Road	Corlette	Holiday Houses;
Caypso	Corlette	Holiday Houses;
Sea Pearl	Corlette	Holiday Houses;Self Contained;
Peppers Anchorage Port Stephens	Corlette	Hotels;Resorts;
Fingal Bay Holiday Park - Port Stephens	Fingal Bay	Cabins and Cottages;Self Contained;Caravan and Camping;
Beach House Fingal Bay	Fingal Bay	Holiday Houses
Big4 Karuah Jetty	Karuah	Cabins and Cottages;Caravan and Camping;
Karuah Motor Inn	Karuah	Motels;
Riverside Motel	Karuah	Motels;
2 Dogs Cottages	Lemon Tree Passage	Self Contained;
Beaches Serviced Apartments	Nelson Bay	Apartments;
Cote D Azur	Nelson Bay	Apartments;
Teramby Court - Heart of Nelson Bay	Nelson Bay	Apartments;
The Commodore	Nelson Bay	Apartments;
Unit 11 Oasis	Nelson Bay	Apartments;
Unit 12 Le Vogue	Nelson Bay	Apartments;
Magnus Street Treetops	Nelson Bay	Apartments;Holiday Houses;Self Contained;



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Name	City	Category
Oaks Lure Nelson Bay	Nelson Bay	Apartments;Self Contained;
Albacore 4	Nelson Bay	Apartments;Self Contained;
Bay Parklands	Nelson Bay	Apartments;Self Contained;
Crows Nest - Nelson Bay	Nelson Bay	Apartments;Self Contained;
Promenade Unit 12	Nelson Bay	Apartments;Self Contained;
Unit 3 Radburn	Nelson Bay	Apartments;Self Contained;
Nelson Bay Bed and Breakfast	Nelson Bay	Bed and Breakfasts;
Halifax Holiday Park - Nelson Bay	Nelson Bay	Cabins and Cottages;Self Contained;Caravan and Camping;
Pine Cottage	Nelson Bay	Holiday Houses;
Thurlow Avenue Holiday House	Nelson Bay	Holiday Houses;
Tranquility at Port Stephens	Nelson Bay	Holiday Houses;Self Contained;
2A Taree Street	Nelson Bay	Holiday Houses;Self Contained;
Dolphins	Nelson Bay	Holiday Houses;Self Contained;
Nelson Bay Holiday House Wollomi29	Nelson Bay	Holiday Houses;Self Contained;
The Nelson Resort	Nelson Bay	Hotel and Motel;Motels;
Marina Resort	Nelson Bay	Motels;
Martys at Little Beach	Nelson Bay	Motels;
Admiral Nelson Motor Inn	Nelson Bay	Motels;
12 Carindale Port Stephens	Nelson Bay	Self Contained;
Albacore	Nelson Bay	Self Contained;
Little Hut	Nelson Bay	Self Contained;
Mantra Aqua Resort	Nelson Bay	Self Contained;
Middle Rock Holiday Resort	One Mile Beach	Cabins and Cottages;Self Contained;Caravan and Camping;
One Mile Beach Holiday Park	One Mile Beach	Caravan and Camping;
Peaceful Palms Bed and Breakfast	Raymond Terrace	Bed and Breakfasts;
Pacific Blue Apartment 288	Salamander Bay	Apartments;
Pacific Blue Townhouse 358	Salamander Bay	Apartments;Holiday Houses;Resorts;
Oaks Pacific Blue Resort	Salamander Bay	Apartments;Hotels;
Port Stephens Luxury Apartments	Salamander Bay	Apartments;Self Contained;
8 Seaview Crescent	Salamander Bay	Holiday Houses;
Salamander Cottage	Salamander Bay	Self Contained;
Bali at the Bay	Shoal Bay	Apartments ;Bed and Breakfasts; Self Contained;



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Name	City	Category
Shoal Bay Resort and Spa	Shoal Bay	Apartments; Hotel and Motel; Resorts;
Anchorage - Shoal Bay	Shoal Bay	Apartments; Self Contained;
Shoal Bay Beach Club Apartments	Shoal Bay	Apartments; Self Contained;
Ocean Beach Bed and Breakfast	Shoal Bay	Bed and Breakfasts;
Shoal Bay Holiday Park - Port Stephens	Shoal Bay	Cabins and Cottages; Self Contained; Caravan and Camping;
28 Rigney Street	Shoal Bay	Holiday Houses;
Shoal Bay Riggers	Shoal Bay	Holiday Houses; Self Contained;
Big4 Soldiers Point Holiday Park	Soldiers Point	Cabins and Cottages; Motels; Caravan and Camping;
Soldiers Point Holiday Park - Port Stephens	Soldiers Point	Cabins and Cottages; Self Contained; Caravan and Camping;
A Beach House on Sunset	Soldiers Point	Holiday Houses;
Sunset Boulevard 12	Soldiers Point	Holiday Houses;
An Old Style Holiday	Soldiers Point	Holiday Houses; Self Contained;
Kent Gardens Holiday House	Soldiers Point	Holiday Houses; Self Contained;
All Seasons Salamander Shores Resort	Soldiers Point	Hotels; Hotel and Motel;
Flagship - Alta Mira	Soldiers Point	Self Contained;
Bays Holiday Park	Taylors Beach	Backpackers and Hostels; Cabins and Cottages; Caravan and Camping



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12. KEY INFRASTRUCTURE RELEVANT TO THE VISITOR ECONOMY

What	Description	Relevance / Issues
Airport	Newcastle Airport in the heart of Port Stephens	Expansion of routes inc Adelaide, Perth, Cairns and International Ability to convert day trips to overnight for inbound Fly drive packages. Needs to be renamed as no connection to Port Stephens.
M1	Freeway from Sydney	Main vehicular connection from the south. Congestion esp holiday periods and end of weekend Expansion into Port Stephens
Sporting Fields	48 sporting fields in Port Stephens	Maintained to a high standard. Opportunity for greater utilisation
Cycleways	Dedicated cycleways/ Pedestrian pathways on Tomaree Peninsula and Grahamstown Dam area	Need greater linkages and expansion
Accommodation	Broad mix of all accommodation types	See audit for listing. Ageing of properties More nationally branded resorts / hotels needed Larger hotels needed to cater for inbound and group market
Tracks, trails, lookouts	Walking tracks and key lookouts at Tomaree and Gan Gan	Tomaree park trails need connecting Local walking trails need identification and interpretation (see below)
Marina, boat ramps	2 main marinas and boat ramps around the destination	Concrete and maintained ramps in the port but ocean side locations are beach based (see below)
Picnic / BBQ / toilets public amenities	Spread throughout the destination. Free BBQ's	Generally well kept and spread around the destination however more are always welcome. Toilets insufficient to meet demand in Nelson Bay and Anna Bay at the head of the dunes
Shoal Bay Wharf	Iconic wharf	Recently rebuilt
Wharves	Particularly at Little Beach, Salamander Soldiers Point	More wanted / needed. Great fishing spots
Visitor Info Centre	Level 1 centre in Nelson Bay	Insufficient parking Undergoing revamp
Public Transport	Port Stephens Coaches	Local services, airport and Newcastle connections and daily Sydney service. Tilligerry and other areas not well serviced
Rail	In Newcastle	Whilst strictly not in Port Stephens, the rail with connecting buses services the destination



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13. SPORTING FACILITIES

Tomaree No.1 Matchfield	1 st Floor 1 x field 2 x change rooms / 1 x large canteen / 4 x gents / 4 x ladies 2 nd Floor 1 large function room / 1 x equipped kitchen / 4 x gents / 4 x ladies / 1 x disabled toilet / bar / small meeting room / air Con
Dick Burwell Oval	1 x field 1 x canteen / 2 x change rooms / public toilets / med – large club room
Fields 2 and 3 (Touch/Soccer Amenities Building)	2 x fields 2 x canteens / 2 x change rooms / 4 x ladies / 4x mens small meeting room
Fields 4 and 5 (Netball Building)	2 x fields 2 x canteens / 4 x ladies / 4 x gents
Fields 6 & 7 (Don Waring Oval)	2 x fields
Salamander Sports Complex	4 x league fields 1 x Hockey fields small function room / 2 x canteens / change-rooms / undercover BBQ area
Old Salamander Bay Oval	1 x soccer field public amenities block / playground
Bill Strong Oval	1 x rugby field 2 x amenities buildings
Fingal Oval	1 x league/union field 1 x amenities block / playground
Mallabula Sports Complex	2 x league fields 1 x athletics field 2 x cricket/soccer fields 1 x training field 3x amenities blocks / community hall / public swimming pool / playground / 3 x tennis courts / skate park
Kindlebark Oval - Medowie	1 x athletic field 1 x amenities block / playground
Boyd Oval - Medowie	1 x rugby field 1 x cricket field 1 x skate park / 5 x tennis courts / 2 x amenities/clubhouse / playground
Yulong Oval - Medowie	3 x soccer fields 1 x amenities block / playground
Ferodale Oval - Medowie	1 x cricket/AFL field 4 x netball courts / 1 x amenities block



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Lakeside Sports Complex	3 x league fields 1x mod field 2 x cricket fields 2 x amenity blocks / grandstand
King Park Sports Complex	5 x cricket/soccer fields 2 x amenities blocks / function room & offices
Boomerang Park	2 x sports fields 1 x amenities building
Vi Barnett Oval	1 x athletics field 10 x netball Courts / 8 x tennis courts / 2 x mod courts / public toilets / 3 x amenities buildings
Stuart Park	1 x cricket/league field 2 x tennis courts / 1 x change room / public amenities / grandstand / 1 x canteen / playground
Bowthorne Wallalong Oval	1 x cricket field 2 x soccer fields 1 x tennis court / 1 x storage shed / 1 x amenities block playground
Brandon Park	1 x cricket/baseball field 1 x tennis court / 2 x netball courts / 1 x amenities block



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14. DOMAIN NAMES OWNED BY DESTINATION PORT STEPHENS (AS AT MAY 2013)

beachedaus.com	portstephensiloveu.com.au
beachedaus.com.au	portstephensiloveyou.com.au
beachedaus.co.nz	portstephens.org.au
beached-oz.com	portstephenstourism.com
beachedoz.com	portstephenstourism.com.au
beached-oz.com.au	portstephenstourism.net
beachedoz.com.au	portstephenstourism.net.au
beached-oz.co.nz	psiloveu.com.au
beachedoz.co.nz	psiloveyou.org.au
conferenceportstephens.com.au	psiluvu.com.au
destinationportstephens.com	shoalbayiloveyou.com.au
destinationportstephens.com.au	soldierspointiloveyou.com.au
experienceportstephens.com.au	statsmeasure.com.au
fingalbayiloveyou.com.au	sydney-surrounds.com
nelsonbayiloveyou.com.au	sydney-surrounds-nsw.com
onemilebeachiloveyou.com.au	sydney-surrounds-nsw.com.au
portstephensaustralia.com.au	tourismportstephens.com
portstephens.com.au	tourismportstephens.com.au
portstephensconferencing.com	tourismportstephens.net
portstephensconferencing.com.au	tourismportstephens.net.au
portstephensdeals.com.au	tunesbythedunes.com.au
portstephensevents.com.au	tunesinthedunes.com.au



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15. CONSULTATIONS

The Port Stephens Destination Management Plan has been written by Tars Bylhouwer with extensive consultation with stakeholders, residents and other interested parties over a twelve month period. Below is a list of those who have formally met specifically to contribute or who have lodged submissions. There have been countless other phone, email and informal contributions. A diagnostic version of the plan was made available to residents, contributors and members of Destination Port Stephens and the resultant significant feedback has been incorporated into the final plan where deemed appropriate.

Special acknowledgements go to Janelle Gardner for incredible assistance with content, logic, layout and all facets of the plan and also to Lori Modde and Naomi Farrelly for their extensive feedback and assistance.

- Port Stephens Council:
 - Steve Bernasconi: Community and Recreation Manager Port Stephens Council
 - Mayor Bruce Mackenzie
 - Peter Gesling: General Manager
 - Kim Latham: Visitor Information and Events Coordinator
 - Andrew Powrie: Business Development and Investment Manager
 - Ross Smart: Economic Development & Communications Section Manager
 - Rachel Wood: Recreation Services & Event Liaison Officer
- Karuah Oyster & Timber Festival / Karuah Museum Proposal - Stacey Ebben , Cindy Murrell, Chris Ebben
- Karuah Historical Society / Karuah Working Together - Benita Parker
- Karuah Working Together / Karuah Motor Inn - Geoff Cheesman
- MarketPlace Raymond Terrace - Colleen Mullholland
- Carline Mufflers Raymond Terrace - Bernie Roberts
- Lakeside Village Tavern - Brian McDermott
- Peaceful Palms Bed & Breakfast Raymond Terrace - Kaye Newton
- Bob Westbury - Westbury Consulting Services
- Colonial Motor Inn Raymond Terrace – Wayne Bamford
- Terrace Jewellers - George Proszkowiec
- Raymond Terrace Business Association - Rebecca Young
- Port Stephens Accommodation - Michael Aylmer
- Newcastle Airport - David Nye:
- Nelson Bay and District Business Association- Keith Campbell
- Tomaree Residents and Ratepayers Association - Geoff Washington, Terry Wall plus a written submission
- Rotary Club - Peter Clough
- National Park and Wildlife Service –
 - Robert Quirk: Robert Quirk Lower North Coast Regional Manager,
 - Andrew Bond: Area Manager, Hunter Coast
 - Adam Faulkner: Planning Officer
- Tilligerry Habitat: Francis Corner
- Tilligerry Chamber of Commerce: Michael Colecliffe
- Hunter Wine Country Tourism: Dean Gorrard
- Newcastle Council: Jan Ross
- Lake Macquarie Tourism / Council: Bianca Gilmore, Graham Hooper
- Westrac – Michael Hingarty
- Destination Port Stephens
 - Natalie Compton
 - Janelle Gardner
 - Siobhan Jacobs
 - Rebecca Morley
 - Sharon Turley



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- Office of the Environment and Heritage (NPWS) Sue Elks
- University of Newcastle: Paul Stolks
- Nadine Clench
- Warrick Strang
- TAFE Hunter Institute: Lisa Campbell
- Lighthouse Tourism: Naomi Farrelly
- Lorricks Management: Lori Modde
- Destination Branding: Bill Baker
- Zeitgeist Consulting: Bill Geist
- Janelle Gardner Marketing: Janelle Gardner
- NSW Department of Primary Industries: Luke Erskine Manager PSGMLP



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