

31 March 2006

Jane Bransby
Casino Advisory Panel Secretariat
3rd Floor DCMS
2-4 Cockspur Street
London
SW1Y 5DH

Dear Ms Bransby

Regional Casino for Newcastle

Please find attached our formal proposal to site a regional casino in Newcastle upon Tyne. I am pleased to submit this document on behalf of the City Council – although you will see from the attached letters of support that our proposal enjoys much wider support from the full range of key partner agencies, including both the Regional Planning Body and the Regional Development Agency (One North East). Our public opinion surveys indicate solid public support, and our local newspapers are championing our bid as good for the City.

I am sure that the uniqueness of our bid is quite clear – the anticipated economic and social benefits of our proposed development are much broader than the jobs and physical regeneration that would flow from a regional casino. Our casino proposal is integral with the development of a major regional convention centre facility. The benefits in terms of inward investment, job creation and knock-on growth of the tourism market that will come with both facilities mean that the positive impact for our City and for the wider region are significantly multiplied, compared to the development of a regional casino alone. The two developments are integral – without the regional casino, there is no realistic prospect of securing the convention centre and the significant regeneration benefits that brings.

The second major selling point of our proposal is the ongoing potential to develop the best and most suitable bid. In Newcastle, there are a number of potential sites and operators who have already indicated a strong interest. Indeed two operators (MGM and Isle of Capri) have taken land options on sites on the edge of the City Centre, well located for transport but set apart from residential and retail activities. Interest has been expressed from four other multi-national companies and we're confident this will multiply if Newcastle were to be chosen by the Panel. The benefits to our city will thus be maximised as developer partners compete to give us the best deal.

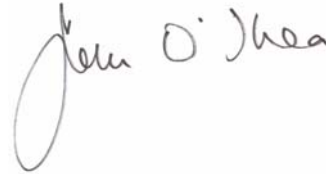
Our third major selling point is our evidence base. Ours is not a speculative bid – it is concise, relevant and focused on providing sound evidence. This evidence is referenced in our proposal, with a compendium of supporting papers and letters enclosed in CD-ROM format. We also have the experience of already hosting four casinos in the city, and this provides us with the invaluable experience and knowledge that cities or towns new to this business lack. I can say with confidence that in Newcastle, the figures stack up.

Finally, I would stress that our enthusiasm has depth. Our bid has been approved through our internal Council processes – with solid cross-party support – and this debate has of course featured concerns about the negative social impact of gambling. The Council, like Government, believes that on this occasion a regulated market will create a unique opportunity to use market forces to provide the research and capacity for authorities and support organisations to manage and support the negative impacts of gambling in our communities. In submitting this bid, our eyes are not blinded to risks and reality by the lure of job creation – we submit our bid today for consideration as a mature, considered, reasoned, balanced and I hope persuasive case.

Yours sincerely



Cllr Peter Arnold
Leader of the Council



Cllr John O'Shea
Leader of the Opposition

Enclosed: Eight copies of the proposal on both CD-ROM and in hard copy. Also included on referenced CD-ROM are letters of support and all referenced documentation in the proposal. Full tables of demographic statistics etc. drawn from the Office of National Statistics are not included separately, but are available on www.statistics.gov.uk

Our **contact officer** who would be pleased to help with any further enquiries is John Miller, Head of Sustainable Development, Regeneration Directorate, Civic Centre, Newcastle upon Tyne, NE1 8PD, Phone: 0191 211 6002, Fax: (0191) 211 4978, e-mail john.miller@newcastle.gov.uk

**CASINO ADVISORY PANEL
Formal Proposal Cover Sheet**

Please fill in all categories below:

Name of Local Authority:

NEWCASTLE CITY COUNCIL

Main Contact:

Name:	John Miller	
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Telephone:	0191 211 6002	Fax: 0191 211 4878
Email:	john.miller@newcastle.gov.uk	

Name and title of Submitting Officer:

Name:	Ian Stratford
Title:	Chief Executive

Statement of basis of application:

What exactly are you proposing? Please make clear which type of casino you **primarily** wish to be considered for.

Regional Yes/No **Yes**

Large (state number) **No**

Small (state number) **No**

If this proposal is unsuccessful what if any is your fall back/ second proposal?

Large (state number) **No**

Small (state number). **No**

Newcastle City Council

Formal proposal to the Casino Advisory Panel

31 March 2006

1. Executive summary

This document presents information in support of Newcastle City Council's proposal to the Casino Advisory Panel for a Regional Casino Entertainment Centre (hereafter "RCEC") in Newcastle.

In developing this submission, the Council has consulted widely and sought the advice of a broad range of stakeholders. It has also engaged the advice of Professor Peter Collins of the Centre for the Study of Gambling at Salford University, and PricewaterhouseCoopers LLP ("PwC"), in seeking to estimate the financial, social and economic implications of locating a RCEC in Newcastle. References are made to these and a range of source and supporting documents, which are provided to the Panel on supporting CD-ROMs¹.

The key points of the Council's submission are as follows:

- the Council believes that a RCEC would have a **major positive impact on the economic regeneration of Newcastle**. As well as generating up to £33m a year in additional output in its own right, a RCEC would also support investment in a high quality Regional Convention Centre, meeting a clear need for the further development of the city's thriving conference industry and potentially generating a further £60m a year.
- the location of a RCEC in an edge-of-city-centre location will provide **up to 950 new sustainable employment opportunities** (on a cautious analysis) for some of the most deprived communities not just in the city but in the country, with up to a further 1,080 from a Convention Centre;
- because Newcastle is already a **growing centre for leisure and business tourism** and is well-placed to capitalise on a RCEC and Convention Centre development to generate further tourism activity and develop "critical mass", locating a RCEC in Newcastle is likely to offer higher overall economic returns than many other potential locations;
- the Council's decision not to select a preferred partner will enable it to use a carefully-designed competitive process for allocation of a licence to extract the **maximum possible contribution to wider community and social benefits**. In addition to a Convention Centre, this will include significant action to prevent and address problem gambling and protect vulnerable groups, and may include further benefits; and
- the City is at the heart of the region's population and transport infrastructure and is therefore highly accessible to both residents and tourists. The location of a

¹ With the exception of statistics available via the ONS website, www.statistics.gov.uk.

RCEC and Convention Centre in Newcastle would be **highly sustainable and in line with the government's planning policies and the draft Regional Spatial Strategy**.

2. Type of area

Socioeconomic background

Newcastle is the regional capital of the North East. After declining by around 15 per cent between 1971 and 2002, the city's population has begun to turn the corner, standing at 269,500² in 2005. The city's black and minority ethnic population is around 6.9 per cent³ of the total, a relatively low figure in comparison to many other major British cities.

Socioeconomically, Newcastle's story is of **polarisation**. The city and wider region experienced significant economic restructuring during the 1970s and 1980s, which saw the demise of the mass employment base in traditional industries on which the city's earlier prosperity was based. The recovery of the 1990s and recent years has been significant, but patchy:

- investment in culture and the public realm has transformed the city and, on the back of strong and stable macroeconomic conditions and rising levels of private and public investment – with the city now home to nationally and internationally significant companies such as Northern Rock and Sage plc – **growth in output and earnings has been strong**;
- but a significant proportion of the city's residents have not shared in rising prosperity, with the employment rate still well below the national average. As a result, Newcastle continues to experience pervasive **deprivation**, particularly concentrated in certain areas of the city;
- Newcastle's record on **educational attainment** is mixed, but improving. In 2005, the proportion of pupils achieving five or more good grades at Key Stage 4 rose sharply to 52 per cent of pupils – one of the fastest increases in England. Serious inequalities persist in the skill levels of the working-age population of the city: a comparatively high proportion of Newcastle's workforce possesses higher-level skills, but at the same time, nearly one third of adults living in Newcastle have **no** qualifications; and
- despite levels of deprivation, Newcastle does not experience high overall levels of crime. As the recently published *State of the Cities* report showed, Newcastle has **lower levels of burglary, robbery and vehicle crime** than any other major English city⁴. However, confidential data from Newcastle's Agencies Against Racial Crime and Harassment (ARCH) indicates that racially-motivated incidents continue to pose a problem that needs to be addressed.

² ONS mid-year estimates, 2004. Newcastle is often regarded as being "under-bounded" – that is, the local authority area is tightly drawn relative to the size of the Tyneside conurbation (NUTS3 statistical sub-region), which has a population of 802,900 and of which Newcastle is the core urban area. This has distortive effects on some socioeconomic indicators, such as commuting patterns.

³ Census 2001

⁴ ODPM, *State of the Cities Report 2006*, pp 136-141.

The table below presents comparative socioeconomic data for Newcastle, the North East administrative region, and the UK. For further detailed analysis of the socioeconomic characteristics of Newcastle, the Panel's attention is drawn to the City Council's recently-published document, *Newcastle Regeneration Strategy: Evidence Report*.

Theme	Indicator	N'cle	NE	UK
Population ⁵	% black and ethnic minority	6.9	2.4	8.7
Economic growth ⁶	% growth in nominal GVA, 1995-2003	54.0	39.8	53.6
	% growth in nominal GVA per capita, 1995-2003	59.2	42.1	49.7
	Nominal GVA per capita as %UK average, 2003	90.9	77.1	100
Employment ⁷	% growth in working-age employment, 1995-2005	4.8	6.7	9.4
	working-age employment rate, 2005	68.5	70.2	74.9
	working-age employment rate, black and minority ethnic people	53.0	55.9	58.6
	working-age employment rate, 50+	60.6	59.5	70.5
Earnings ⁸	% growth in full-time median weekly earnings, 1998-2005	33.2	27.5	28.8
	full-time median weekly earnings, %UK average, 2005	93.7	89.4	100
Education ⁹	% achieving 5 or more good GCSEs or equivalent, 2005	52.1	53.5	56.3
	% achieving no GCSEs or equivalent, 2005	6.3	4.3	3.6
	% achieving required standard in English at Key Stages 2/3, 2005	72/58	78/67	79/71
	% working-age population with NVQ4+ qualifications, 2004	26.7	20.6	26.2
	% adult population with no qualifications, 2001	32.6	34.7	29.1
Deprivation ¹⁰	% super-output areas in most deprived 10% on IMD 2004	30	21	10
	% dependent children living in households with no-one in work	27	n/a	17

The Council is able to monitor changing socioeconomic trends through the **Newcastle Neighbourhood Information Service (NNIS)**, which measures outcomes at neighbourhood ("super-output area") level across a range of indicators including income, employment, education and housing. This provides a strong quantitative basis for estimating the impact of regeneration activities on particular areas of the city, making Newcastle a good location for testing social impact in some detail.

Recent trends in tourism in Newcastle

Tourism has played a **leading role in the economic resurgence** of Newcastle, together with Gateshead, over the past decade. Three major drivers of the tourism boom in the city can be identified:

- **investment in regeneration of the public realm**, with a strong emphasis on culture as a catalyst for change. The development of BALTIC, The Centre for Contemporary Art; The Sage Gateshead; Seven Stories The Centre for the Children's Book; Dance City; the historic Grainger Town area of Newcastle; the Gateshead Millennium Bridge and the restoration of Saltwell and Leazes parks have, literally, transformed the landscape, renewing and re-establishing the city's distinctive identity and enduring pride of place. (A RCEC in Newcastle would be expected to conform to the highest standards of design quality.);

⁵ Census 2001

⁶ ONS. Newcastle figures are for Tyneside NUTS3 area.

⁷ First two lines: Labour Force Survey, ONS. Third and fourth lines, Annual Population Survey, ONS.

⁸ Annual Survey of Hours and Earnings, ONS.

⁹ First three lines, DfES. Fourth line, LFS. Fifth line, 2001 Census.

¹⁰ 2004 Index of Multiple Deprivation.

- the bid made by NewcastleGateshead for **European Capital of Culture 2008**, which created a momentum that has been continued by the ambitious “Culture 10” programme of arts and sporting festivals, events and activities; and
- the establishment of **NewcastleGateshead Initiative** (NGI), a public-private agency with 170 members from business including the hotel and tourism sectors, to develop a tourism brand for the city, and market NewcastleGateshead proactively as a destination for leisure and business tourism, especially “citybreaks” and conferences.

In addition, NewcastleGateshead has several **strategic tourism assets**, including

- the easily accessible transport hubs of Central Station and Newcastle International Airport, which is expanding to an ever-growing number of flight destinations and is expected to grow to 10 million passengers by 2016, more than double the current throughput;
- the Port of Tyne, which is increasingly a key gateway for visitors from Scandinavia and Northern Europe – two of NGI’s identified growth markets. Between 2004 and 2006 the number of cruise ships visiting has increased from 9 to 22 and the number of cruise passengers fourfold from 8,000 to 36,000. The QEII is expected to visit next year;
- the city is also convenient for the remarkable countryside and coast of Northumberland and Durham, and a good base for exploring further afield west to the Lake District, north to Edinburgh and south to York and the North Yorkshire Moors.

Collectively, these recent developments and strategic assets have the makings of **critical mass** in tourism and leisure, which is now yielding sustained growth. In 2004, tourist industry revenue in NewcastleGateshead grew by 5 per cent on the previous year¹¹ to £425m, generating over 21,000 tourist days, contributing to some £1.8 billion in tourism value across the NorthEast region and positioning tourism as a genuine driver of the local economy. Tourism accounts for an estimated 7,500 jobs in NewcastleGateshead, almost 6,000 directly. Other salient facts include¹²:

- 6.1 per cent of the UK population visited NewcastleGateshead in 2004-05. 42.5 per cent of visitors came for holiday or pleasure purposes, and 26.4 per cent for business. The domestic leisure tourism market attracts people from across the UK with high proportions of visitors from Yorkshire, the North West and Scotland, and sizeable city markets from Belfast and Bristol;
- perhaps contrary to common perception, the city is a popular destination among AB social classes, who accounted for a third of visitors in 2004-05. Nationally, a higher proportion of ABs have visited NewcastleGateshead than of any other class group;

¹¹ STEAM analysis of tourism in the North East

¹² Woodholmes Group, NewcastleGateshead visitor numbers survey 2004-05. Figures exclude visitors from the North, who are more likely to be casual or regular visitors and those visiting family and friends.

- half of visitors to NewcastleGateshead stay between one and three nights. A further 12 per cent stay between four and eight nights. In the last three years, the city's hotel offer has grown by 1,400 beds, with a particularly high average occupancy rates of 75 per cent;
- overseas staying visitors to Tyne and Wear totalled 350,000 in 2004, with around another 300,000 entering via the airport and port for other destinations;
- evidence from a survey of conference delegates¹³ indicates that NewcastleGateshead's transport accessibility and relative compactness is a distinctive feature of its tourism development. Three-quarters of delegates came to the city by air or rail, and 85 per cent found it easy to get around.

Future plans for tourism development

NewcastleGateshead's vision for the future of tourism in the city, as articulated by NGI, is *to ensure that NewcastleGateshead is within the **top four city destinations** of choice for both leisure and business visitors both nationally and internationally.*

NGI's expert view is that a RCEC in Newcastle would strengthen significantly the city's tourism offer and enable it to build on the success it has enjoyed so far. There is developer interest totalling a further 1,000 beds on sites in the city, and a RCEC, especially if coupled with a Convention Centre, would be expected to accelerate and increase such development. PwC have provided detailed advice on the likely scale of the tourist market for a RCEC (see "Need for Regeneration").

However, a further important aspect of Newcastle's proposal is the potential (discussed further under "Community benefits") for the licensing process to **enable delivery of a large-scale Convention Centre** in the city that would support significant further growth in its already-successful conference market.

In 2004, NewcastleGateshead was selected by 9.5 per cent of organisers¹⁴, with The Sage Gateshead, Metro Radio Arena, St. James's Park and the larger hotels among the favourite venues. However, the NewcastleGateshead Initiative (NGI) convention bureau, which helps to broker conference custom in the city, has had to turn down at least 40 major events with potentially nearly 40,000 delegates since its inception either partly or entirely because of a lack of a suitable venue including sufficient space for delegates and exhibitions. Out of a total of 179 enquiries made to NGI for events for more than 500 delegates, only 33 have subsequently been confirmed, 112 have been lost, and 34 are pending. An enquiries-to-bookings conversion rate of 18 per cent, compared with a national average of 40 per cent, shows the scale of lost business. Among the major conferences the city has foregone have been the British Dental Association (1500), Association of surgeons (1500), British Orthopaedic Association (1500), Rotary (3000), News International Group (1200) and National Housing Federation (1000). Many of the potential customers have been in the medical and other sectors whose business has a strong fit with the development of Newcastle as a Science City. Every 1000 delegates forsaken is worth around £0.5 million lost to the city's economy. On this basis, the 40 major events lost above have **cost the city up to £20 million** over the last three years, and further opportunity costs will accrue in the coming years.

¹³ NGI board paper – see document centre.

¹⁴ Meetings Industry Association, 2005 UK Conference Market Survey.

Aside from issues of finance and efficiency (considered below), there is potential synergy in the development of a RCEC (enhancing the leisure offer) and Convention Centre (enhancing the business offer) that may have an additional impact on tourism development. Currently, though only 50 per cent of delegates to conferences in the city have visited before, 85 per cent say they would either “definitely” or “maybe” return to the city for leisure purposes in the future – well ahead of a national average of around 40 per cent. Delegates to conferences in NewcastleGateshead are also more likely than average to bring a partner.¹⁵ The potential for a RCEC development to deliver a Convention Centre is considered in detail in “Community benefits”.

3. Social impact

The information provided in this section and the following, “Need for regeneration” which deals in detail with the economic impact of Newcastle’s proposal, are based on the advice and analysis provided by PwC in their report, *Proposed Regional Casino Development – Economic and Social Impact Assessment*. In preparing this report, PwC have consulted widely, in addition to drawing on the best available analysis and empirical evidence and data. Nevertheless, the Council accepts that – as with any attempt to describe and quantify the effects of new activities, but particularly so in the case of RCEC development which is wholly new to the UK – any such analysis can be no more than a best estimate. The Council is grateful to PwC for adopting cautious and conservative assumptions in its economic and social impact assessment, consistent with the Council’s insistence that a RCEC development must be prudently planned if it is to benefit the community.

This consideration of social impact covers:

- problem gambling;
- the suitability of potential locations for a RCEC in Newcastle;
- protection of children and vulnerable groups;
- crime and social cohesion;
- social benefits of a RCEC; and
- action that can be taken to address possible negative social impacts.

Problem gambling in Newcastle

Problem gambling is defined by GamCare as ‘participation in gambling to the point where it causes serious harm to oneself and others.’ Various attempts have been made to quantify the potential social costs associated with casino problem gambling, with widely varying results. In the UK, the relatively low numbers of casino gamblers have resulted in low numbers of identified problem gamblers to date. However, evidence does appear to suggest that a significant proportion of current UK casino revenue is generated from a relatively small core of problem gamblers.

The balance of international experience suggests that, in minimising the risk of problem gambling, education and raising public awareness is of critical importance. It is not known whether public education campaigns and other social responsibility measures can prevent problem escalation entirely if introduced with increased access to gambling opportunities; but, whilst results of studies and expert opinion vary in terms of the

¹⁵ Conference delegate survey – see document centre.

degree of impact public awareness campaigns might have, there appears consensus that such campaigns are crucial in mitigating potential problem gambling risk.

The North East Council on Addictions (NECA) has, since 1997, worked in partnership with GamCare to identify potential problem gambling issues and provide support to affected individuals. With the recent launch of new casinos in Newcastle, problem gambling is increasingly on the agenda of NECA. Evidence held by NECA includes the number of problem gambling referrals (104 new referrals between April and December 2005), though NECA have not observed significant increases in the number of referrals (see “Probability of Implementation”). However, the number of referrals is likely to be more a function of the extent to which NECA’s services are promoted, rather than the level of need. Raising NECA’s profile and capacity further would require additional resources (see below).

The suitability of a ‘Discovery Quarter’ location

In considering potential locations of RCEC developments and related social impacts it is important to recognise the distinction between ambient and non-ambient gambling. Ambient gambling refers to forms of gambling that are highly convenient and easily accessible (e.g. internet gambling or high street bookmakers). Non-ambient gambling are those forms that are less convenient to access and require forward planning to participate in (e.g. an out of town RCEC located away from residential areas). The risk from non-ambient gambling is considerably less than that associated with ambient gambling. Building a RCEC in a non-ambient environment is therefore important to minimise the risk of problem gambling.

The Council believes that the unique location of the Discovery Quarter – on the western edge of the City Centre located between the commercial/ retail core of the city and several Inner West neighbourhoods with significant levels of unemployment and other deprivation – makes it an ideal site for a RCEC. While the Discovery Quarter’s edge of city centre location and proposals for substantial regeneration may suggest that risks of ambient gambling may be relatively high, the exact location of the specific sites identified by developers, and physical constraints on access to them, has the potential to mitigate such risks significantly, limiting the scale of passing trade and convenience gambling. In addition to existing site constraints and established natural buffers, the Council is committed, through its influence as planning and licensing authority, to building in safeguards against ambient gambling into RCEC design. Such safeguards could include:

- promoting insularity through campus-type developments incorporating Convention Centre facilities;
- building or enhancing landscape buffers or public realm features to separate the RCEC from ‘passing trade’; and
- considering site access arrangements and relationships with highway networks.

The Discovery Quarter covers 95 hectares, contains a number of large vacant and underused brownfield sites, and the Buchanan Study (Feb 2005) estimated the area has the potential to provide new commercial leisure and tourism development that could yield up to 15,000 FTE jobs and over 2 million sq ft of office floor space.

Due to its strategic importance, the Discovery Quarter has been identified as a major growth pole, and a key priority for development in the 2005 Regional Economic Strategy developed by One NorthEast. Development of a RCEC would therefore be expected to form part of a substantial regeneration programme incorporating residential, commercial, leisure and retail developments. Its high levels of accessibility by air, port, mainline rail, Metro and trunk roads gives it a significant advantage over other development locations.

Protection of Children and Vulnerable Groups

The Gambling Act 2005 contains a range of measures to safeguard children and the vulnerable, and, as licensing authority, the Council proposes to adopt a rigorous approach to ensuring these safeguards are adhered to. Given these safeguards, both Northumbria Police and NECA have advised that they consider access to casinos by children to be low risk, with no direct risk of children being affected by problem gambling.

Despite these safeguards it is possible, given the increased exposure of gambling activities and the higher profile of casinos as mainstream leisure attractions, for children and other vulnerable groups to be indirectly affected through, for example, parents, siblings or friends being problem gamblers. Support networks will be expected to take full account of these risks in the design and delivery of problem gambling support services.

Crime and social cohesion

Consultations with Northumbria Police suggest that the risk of crime inside and in close proximity to a RCEC would be low, reflecting the substantial investments by operators in security and surveillance technology, with additional focus on complying fully with (and indeed going beyond) money laundering regulations.

Northumbria Police advise that prostitution, an issue traditionally linked by some to casinos, has not been a significant issue in Newcastle since the 1980's, and there is no evidence to suggest this would be impacted by a new RCEC. There are relatively few incidences of disorder and anti-social behaviour connected to existing Newcastle casinos. Theft is also not considered a significant issue in casinos.

An issue with a higher degree of uncertainty is the potential impact of a RCEC on crime in areas away from the RCEC. Such crime may be generated as a result of underlying problem gambling issues. Research in the United States suggests that new casino developments may lead to an increase in crime levels. Such risks would be expected to be mitigated by proactive work by operators to address problem gambling risks in general and in particular to minimise any adverse effects on surrounding communities.

Potential Social Benefits of a RCEC

PwC advise that the primary social benefits of a RCEC in Newcastle will be in the form of substantial direct and indirect employment and economic opportunities. Clearly, to the extent that it meets currently latent demand for casino gaming, a RCEC will also increase overall social welfare. The exact extent of such impacts is dealt with fully in the following section. The scope for ancillary social benefits from locating a RCEC in Newcastle is discussed fully in "Community benefits".

PwC advise that there is potential for action to maximise the impact of a RCEC on efforts to address the significant labour market underperformance in the city and wider region. They suggest that the development of local recruitment and training programmes by a potential RCEC operator should be carried out in partnership with existing local education institutions. For example, Newcastle College, together with other local employment and training agencies (including Learning and Skills Council and Job Centre Plus, etc) and the RCEC operator might work together to maximise the training benefits of a RCEC and enhance the development of skills to facilitate progression to higher level positions within the RCEC operation. Aspers, who recently launched a casino in Newcastle, stated in a press release that of the 180 people working in their casino more than 98% of the recruits are from Tyneside. Such a high percentage is due in part to a local training academy they have developed. This is the model PwC suggests any operator of a RCEC in Newcastle should adopt. The Council agrees, and would seek to pursue such an approach through a competitive licensing process.

Action to address possible negative social impacts

On the basis of their in-depth analysis of the social impacts of casino development, summarised above, but noting the high degree of uncertainty involved, PwC make several detailed recommendations on action the Council could take to ensure a proactive and precautionary approach is taken to minimising the risks involved. The Council supports this approach, which requires it to:

- reduce to the maximum extent possible the opportunity for ambient gambling;
- build upon the GamCare/ NECA partnership to develop a local multi-stakeholder agency to mitigate casino problem gambling risk;
- embed a variable operator contribution to address social risks in any licensing arrangements;
- ensure high levels of transparency of the RCEC operator's business model;
- implement casino social responsibility performance management systems;
- ensure independent monitoring over casino social responsibility performance data;
- collect baseline data on problem gambling before the launch of the RCEC;
- launch a rigorous local education/ public awareness campaign on problem gambling;
- focus initiative to mitigate problem gambling by high-risk groups;
- develop a precautionary approach regarding children and the RCEC;
- rigorously implement new legislation to reduce ambient gambling opportunities; and
- develop a local Newcastle partnership focused on maximising training and education benefits;
- set and monitor aspirational targets for local employment; and
- embed mechanisms to ensure that local enterprises maximise benefit from RCEC procurement.

Should Newcastle's proposal be accepted, we will:

- through the competitive process for licensing a RCEC, accord potential operators' commitment (of time, funding and other resources) to these actions the highest priority in assessing bids;

- consult widely and take further expert advice on both preventative and curative measures in all aspects of potential social impact; and
- ensure sufficient time prior to the opening of a RCEC for a rigorous programme of education, information and preparation.

4. Need for regeneration

This section deals with the impact we expect a RCEC to have on the regeneration of Newcastle, covering:

- market demand for a RCEC in Newcastle;
- consequent economic impact, including on employment, output and tourism; and
- the fit of a RCEC development with the city's broader regeneration plans.

Market demand

This section considers the potential market demand for a new RCEC in Newcastle. The exact development parameters for a RCEC operation in Newcastle are unclear at the present time, because the Council has opted not to partner with a preferred operator in order to realise the likely benefits of a fully competitive licensing process. The analysis is therefore based on a facility located within the Discovery Quarter on the western edge of Newcastle city centre, with development parameters based on an outline proposal put forward by a potential operator, for a 7,500 sq m casino facility with four restaurants, lounges and an entertainment venue, and 352-room four star hotel including meeting and conference facilities.

PwC's report finds that:

- the UK casino market currently has 138 casinos, recording in 2005 a total attendance of 12.3 million, a total "drop" of £4.1 billion, and "house win" of £715m. This equates to net expenditure per visit of around £58. Attendance, drop and house win have all shown year on year growth, which suggests a positive trend in demand, largely driven by spend rather than attendance;
- there appears to be evidence for a relatively high propensity to gamble in Newcastle and the North East, and growth in participation in casino gaming. The local catchment shows around 50 per cent higher overall gambling propensity compared to the UK as a whole. Market penetration in the North East/ Yorkshire region was 4 per cent compared with a 5 per cent estimate for the UK;
- data from the UK Gambling Commission supports the view that the North region has a growing market. Regional "drop" per year is higher than any other provincial region, and while average spend per customer is lower than the UK average, growth over the past three years has been high; and
- deregulation is expected to result in a broadening of the appeal of casinos, driving further growth in attendance levels and market penetration rates. Lessons from other deregulated markets support the argument that higher penetration of

the market can be achieved, with around 25% in the USA, 20% in South Africa and 10% in Australia.

PwC have estimated potential demand for a RCEC in Newcastle based on:

- estimated changes in gaming participation following deregulation;
- lessons from overseas markets; and
- consideration of the profile of the catchment market (18+ and off peak drive time).

These benchmarks are applied to the resident catchment and tourist population, to result in a total estimates for visits and spend. This results in estimates of:

- a total resident catchment market of 1.5m visits and just under £90m revenues to casinos in Newcastle, with an estimated share for the RCEC of two-thirds of the market – implying 1 million visits to the RCEC from the catchment market and just under £60m gaming spend; and
- 250,000 visits *per annum* from overnight tourists and £20 million spend.

Total demand for a RCEC is cautiously estimated to be 1.28 million visits per year and £80 million in spend. This calculation comes with a number of health warnings: the market is untested for a RCEC, and there is not a strong consensus about the likely impact of deregulation on levels of market penetration. For example, if we flex one element of demand – resident catchment visit frequency – this results in a significant change in revenues and visits: if frequency is increased to 8 visits p.a. this would result in 1.5m visits and £93 million revenues (a £13 million increase); conversely if frequency is reduced to 6 times p.a. this results in 1m visits and £68 million revenues (£12 million reduction).

Economic impact

This section outlines the range of potential economic benefits that might be generated within the local and regional economy as a result of the construction and operation of a RCEC within the Discovery Quarter. It also details the key assumptions upon which these ranges of economic impact are based and consequent sensitivity of these ranges if these assumptions are not realised. (NB these figures do not take into account the implications of a RCEC and hotel being co-developed with a Convention Centre.) PwC's approach to undertaking this assessment is consistent with HM Treasury Green Book standards and the English Partnership's Additionality guide. Geographically, the impact is considered at two spatial levels: "local", being Tyneside (local authorities of Newcastle, Gateshead, North Tyneside and South Tyneside), and "regional", the North East.

Total net employment

The first key impact is on employment. There are three main potential sources of direct employment: jobs generated on site during the construction phase, jobs generated on-site during the operational phase, and jobs created "off-site" due to supply chain benefits and off-site expenditure by visitors to the casino. In deriving the net or additional jobs created, it is necessary to take account of substitution (jobs lost elsewhere in the same

sector), displacement (jobs lost in other sectors) and deadweight (the number of jobs likely to happen anyway even if the RCEC were not to be developed). The resulting net direct jobs estimate is then multiplied by an indirect and induced multiplier factor to estimate the effects of indirect employment (resulting from supply-chain expenditure) and induced employment (generated by the recycling of direct employee incomes). The extent of the indirect and induced employment effects within any given local economy is conditioned by the extent of the “dispersion” of economic activity outside of this area.

PwC’s analysis gives the following overall results:

- **construction phase.** PwC estimate that in total the construction process for the proposed development will create about 183-254 net new FTE jobs for Tyneside, and 199-308 FTEs on a regional basis;
- **operational phase.** PwC estimate that the operation of the RCEC and hotel will create around 290-615 net new FTE jobs for Tyneside, and 232-560 FTEs on a regional basis¹⁶.

Tourism impacts

The Government’s view is that gaming has the potential to attract tourists to different parts of Great Britain, where they might choose to visit larger international-style casinos, and at the same time take in a number of leisure facilities in the same location or nearby. Visitors might be attracted both from within the United Kingdom or from abroad. In economic terms, for the UK as a whole the benefits of increased casino use lie predominantly in their impact on tourism, because within the UK the overwhelming majority of spend is likely to be displaced from other consumption, benefiting some areas but largely at the expense of others.

PwC estimate that a RCEC in Newcastle would attract an additional 63,000 visitors a year to the region. Based on analysis of existing tourism patterns (see “Type of area” above), this would imply £5.9 million additional tourism expenditure at the local level, creating about 67-77 net new FTE jobs for Tyneside, and 64-84 FTEs on a regional basis.

Impact on overall economic output

PwC find that “despite quite conservative assumptions, a RCEC and associated hotel would be expected to make a significant contribution to the local economy”:

- **in total the scheme would create about 498-952 FTEs for the North East region, of which up to 850 could be taken up by people from Tyneside; and**
- **based on GVA per capita data, this would lead to an increase in regional GVA of £17-33 million a year.**

PwC conclude that:

“analysis suggests that the proposed RCEC development will have significantly

¹⁶ the regional range is lower than the local range because of substitution and displacement effects.

beneficial employment and output effects at both local and regional levels. The UK Government takes the view that sustainable economic development in deprived areas will only be achieved through building competitive businesses and a competitive business environment that generates jobs, income and wealth. RCECs with their ability to create significant employment offer much to support the regeneration initiatives that are currently taking place or being contemplated...It is also expected that the RCEC development will lead to several other wider economic benefits for the local area in terms of the possibility of a casino development cross-subsidising the Convention Centre which would in turn provide a distinctive marketing and visitor profile for Newcastle.”

Fit with broader regeneration needs in Newcastle

The development of a RCEC, together with that of a Convention Centre, would display a clear fit with the Council’s regeneration plans and the city’s needs. Paramount among the motivators for Newcastle’s proposal is the clear potential to link the creation of sustainable new employment opportunities to areas of need. Areas of multiple deprivation in Newcastle are particularly geographically concentrated in the West and East ends of the city, predominantly in communities that formerly serviced now-defunct industries along the river Tyne. Many of these areas, especially in the inner West, are in close proximity to the city centre. There is a particular concentration of black and minority ethnic population in Wingrove (21 per cent of the ward population) and Elswick (16 per cent) wards. These “inner west” areas are among the closest residential areas to the likeliest sites for a RCEC and Convention Centre, in the Discovery Quarter.

The Discovery Quarter is a transitional area between the prosperous commercial core of the City Centre to the east and the deprived neighbourhoods to the west. The area is now starting to change, and contains the greatest potential for urban economic growth in the region. It is one of the regional development agency One NorthEast’s regional growth poles, and therefore a priority for regeneration in One NorthEast’s, the Council’s and the universities’ plans.

It is also a huge opportunity for local communities to benefit from such growth, and a key part of the Council’s Regeneration Strategy for the city to 2021, a consultation draft of which has recently been published. This sets out in detail the regeneration challenges the city faces, and the interventions the Council and partners propose to accelerate the pace of delivery across a full range of policy areas. Other key elements of the Strategy include:

- the development, in conjunction with the city and region’s higher education institutions, business and other partners, of Newcastle Science City as a centrepiece of the long-term transition to a **knowledge-led economy**, including a major new site – Science Central – within the Discovery Quarter. This will complement the further development of the design, retail, leisure and tourism industries and action to promote popular enterprise; and
- the physical, environmental and social **regeneration of many of the city’s most deprived areas**, with specific area action plans in key regeneration areas such as Benwell and Scotswood to the west and Walker Riverside to the East bringing together investment plans for housing, public services, transport and the public realm;

- **improving connectivity between the West End and the City Centre.** This will include improved physical links and greater accessibility through more pedestrian penetration and improved public transport along key corridors. This would be vital in providing infrastructure support for any RCEC and Convention Centre.

5. Willingness to licence

Newcastle City Council's proposal commands broad support both from within the Council and from local and regional partners:

- the Council's **Licensing Committee** considered their willingness to licence a RCEC on the basis that it can provide the means to secure significant regeneration activity, including a Convention Centre. The Committee agreed the principle of a willingness to licence and that, if selected as an area, a group would need to be established to assess and address any potential negative social impacts of gambling in the area and to optimise any positive social cohesion issues funded by way of developer/operator contributions;
- support has also been received in principle for a RCEC from the **Council's Executive, the Local Strategic Partnership and the City Centre Partnership**;
- a **public consultation exercise** was carried out in March 2006 to assess the levels of support for a RCEC in the City. The response levels provide a statistically robust picture with 257 residents interviewed by telephone and 250 City Centre users interviewed in the city. 51 per cent of residents and 59 per cent of City Centre users expressed support for a RCEC and the associated development; 37 per cent of residents and 27 per cent of City Centre users opposed a RCEC in the city. PwC found that such a 14 per cent net favourable rating is significantly better than evidence noted in a UK nationwide survey which recorded a 30 per cent net unfavourable rating for casino table games; and
- **letters in support** of the Council's proposal have been received from the North East Assembly (the Regional Planning Body), NewcastleGateshead Initiative, One North East, the Hoteliers Group, Northumbria Tourist Board, NEXUS (the Passenger Transport Executive), Newcastle Airport, the Port of Tyne, North East Chamber of Commerce, Newcastle University, Northumbria University, Newcastle College, BALTIC Centre for Contemporary Art, and the GMB union. Northumbria Police have confirmed in writing that the Council's proposal "would not lead to policing issues that would not be easily managed". The Council's proposal has also received favourable coverage in local media.

6. Probability of implementation

This section deals with the practical aspects of implementation of a RCEC not dealt with in earlier sections. It therefore covers:

- the criteria the Council would use to identify appropriate and sustainable locations for the development;
- existing and proposed transport infrastructure;
- description of current provision for gambling in the area and the impact of competition on existing activities;
- current investor interest, and balance of public and private sector investment.

Criteria for identifying sites

The Council proposes to allocate any licence by means of a competitive process designed to extract maximum possible community benefit (see “community benefits”). As part of this, it will set clear criteria for identifying appropriate sites. The Council’s criteria will follow those set out by the Casino Advisory Panel, and will thus ensure that the RCEC acts as a catalyst for sustainable regeneration of the area. There are sites available in the Discovery Quarter which offer significant potential and which have already been identified by developers, but the Council would not rule out sites outside the Discovery Quarter provided they met the appropriate criteria, including for transport sustainability and employment demand. The locations identified to date by potential operators are on brownfield land, in need of redevelopment, and with supportive landowners.

Transport infrastructure

The Council is committed to promoting sustainable development, improving the quality of life for residents in the area and providing access to opportunities. As the regional capital, Newcastle is extremely accessible:

- **by train.** Through Newcastle Central Station, Newcastle is connected directly through a variety of operators to London, Edinburgh, Glasgow, Leeds, Birmingham and Manchester while other principal cities such as Liverpool, Nottingham and Cardiff can be reached through a single change. The station is located to the southern end of the Grainger Town area within walking distance of the Discovery Quarter area;
- **by air.** Newcastle International Airport is located 6 miles to the north west of the city centre and provides the city’s gateway to domestic and international air travel. The airport is linked to the city centre through the Tyne and Wear Metro system and via the A696 / A167 trunk road. The airport handled 4.75 million passengers in 2004, a 40 per cent growth since 2001¹⁷ and is expected to grow to 10 million by 2016;
- **by road.** The local road network provides links into the national strategy road network to the north through the A1 and to the south through the A1(M) and A19 trunk roads. The A69 trunk road connects Newcastle with Cumbria and the M6 corridor providing road access to Glasgow and Lancashire;
- **by bus and coach.** Newcastle City Centre is the focal point for the region’s public transport system, with frequent city-wide bus services crossing the city centre and longer-distance bus and coach services originating from three bus/coach stations in the city; and
- **by light rail.** The Tyne and Wear Metro system provides rapid and reliable connections within the city, across Tyneside to the coast, to Sunderland and to Newcastle Airport.

¹⁷ Tyne and Wear Local Transport Plan 2

The Council would seek to use the licensing and town planning processes to deliver necessary improvements in transport accessibility to and around the proposed site; however, the Council sees the high standard of existing accessibility to and within the city as a positive aspect of its proposal.

Current gambling provision and the impact of competition from a RCEC

There are currently four operational casinos in Newcastle, with planning permission for two additional facilities. The existing facilities are Stanley Leisure (opened 1997-98), Grosvenor (opened 1998), Bannatyne (opened February 2005) and Aspers (opened October 2005). Other gaming products in Newcastle include bingo (5 cash bingo, 5 bingo clubs, 4 prize bingo), betting (2 track betting venues, 72 betting offices) and other (22 Family Entertainment Centres, 89 clubs with machines, 16 members clubs). At the wider regional level there is only one other casino, in Sunderland. A number of local authorities in the region have indicated interest in a future regional or other casino.

A detailed quantitative analysis of the impact of competition from a RCEC in Newcastle has not been undertaken. PwC have estimated that a RCEC would secure around two-thirds of gambling activity, and that there is latent demand for additional gaming. The extent to which a RCEC would be a direct substitute for existing gambling products in Newcastle is also unclear. However, it would be prudent to anticipate some increase in competitive pressures on existing gambling facilities, which may lead to market restructuring in due course, as well as encouraging a more competitive overall offer for consumers.

Investor interest and balance of public and private sector investment

Newcastle City Council has received strong indications of interest in investment from three separate parties. At least two of these parties have secured land interests in the Discovery Quarter.

The Council has sought information from potential investors on the likely nature, scale and impact of their plans¹⁸. Responses indicate that investors expect the economic returns of a RCEC in Newcastle, and the resources available for community benefits, to be significantly higher than the cautious estimates by PwC on which the Council's proposal is based. The Council is encouraged by the positive signals from potential investors regarding the delivery of a Convention Centre, and other important social benefits including local recruitment, employment and training.

However, the Council recognises that a true picture of the package of costs and benefits offered by each potential investor will emerge only through a competitive licensing process, and that such a process is by far the most efficient way of allocating a licence. It is also probable that, should Newcastle's proposal be accepted, further investors may enter the competition.

The Council expects both a RCEC and a Convention Centre to be delivered, managed and run in full without public subsidy for capital or revenue expenditure.

¹⁸ see document centre.

7. Regional and local context

A wide range of policies at national, regional and local level support the development of a RCEC in Newcastle. National planning policy supports major development in sustainable locations and Newcastle is at the heart of the region's population and transport infrastructure. PPS 1 and 6 and PPG 13 all highlight the need to focus growth in existing centres, requiring sequential testing in order to promote vitality and viability of centres. In line with sequential testing, a RCEC together with regional conference facilities should be developed in Newcastle to yield sustainable benefits in jobs, business and leisure tourism, transport and regeneration of the wider area.

PPS 1 outlines that development should:

- **provide improved access** to all jobs, health, education, shops, leisure and community facilities, open space, sport and recreation by ensuring that new development is located where everyone can access services or facilities on foot, bicycle or public transport;
- focus development that attracts a large number of people – especially retail, leisure and office development – in **existing centres** to promote their vitality and viability, social inclusion and more sustainable patterns of development; and
- **reduce the need to travel** to encourage accessible public transport provision to secure more sustainable patterns of transport development. Planning should actively manage patterns of urban growth to make the fullest use of public transport and focus development in existing centres and near to major public transport interchanges.

Policies in the Draft Submission **Regional Spatial Strategy (RSS)** support locating a RCEC in Newcastle. The RSS recognises that *'casinos have the potential to make a considerable contribution to economic regeneration and development'* (paragraph 3.23), and the Regional Planning Body has written to the Council supporting its proposal. Newcastle is identified in RSS as a core area within the Tyne and Wear City Region, acting as a regional centre for employment, retail, health, cultural, leisure and tourism facilities. The key challenge for the city is to maintain its position as the regional capital, regenerate areas of brownfield land and maximise the tourist and business related offer. This can be achieved by capitalising on major regeneration opportunities such as a RCEC and conference facility.

Policies 6 and 12 of RSS further emphasise the significant role of Newcastle, stating that the majority of economic development should be focused in city centres and Prestige Employment sites; and, more particularly, that new retail and leisure development should be located in the regional and sub-regional centres. Newcastle is identified as *'by far the most significant shopping and leisure centre within the city region and region generally and should continue to act as a natural hub for retail and leisure activity.'*

The Council has begun work on preparation of a **City Centre Area Action Plan** which forms part of the Local Development Framework and will guide development of the City Centre over the next 10-15 years. A Key Issues Paper has been prepared which is currently the subject of public consultation. The City Centre Area Action Plan will seek to promote Newcastle as a cosmopolitan European City Centre and one objective will be to

develop a diverse range of range of retail, leisure, tourism and culture. A RCEC and Convention Centre would make a vital contribution to this objective and indeed the regeneration of the City.

8. Community benefits

The Council's proposal for a RCEC is expressly predicated on the expectation that it will bring ancillary regeneration and development benefits to the city that are unlikely to be achievable by other means in the medium-term.

A Regional Convention Centre

In particular, the Council regards the granting of a licence through a carefully-designed competitive process as a means of securing investment in, and delivery and operation of, a large-scale, high-quality Regional Convention Centre.

As set out above, the lack of a dedicated Regional Convention Centre means that NewcastleGateshead has reached a glass ceiling in the strong growth in conference business that has followed the city's emergence as an attractive leisure and business tourism destination. Detailed work for Newcastle City Council and One NorthEast has found that:

- **there is a good case for developing a Regional Convention Centre in the North East.** The optimal size would be a 1,500-delegate hall accompanied by break-out and exhibition spaces, and the optimal location – due to the quality of accommodation, transport links and complementary “offer” – would be the centre of Newcastle and Gateshead¹⁹;
- a Regional Convention Centre could **generate between £25 million and £63 million** in additional net income to the local economy that, in turn, could support **between 335 and 1,088 full time equivalent jobs**²⁰;
- on a worst-case assessment of the potential costs, a Convention Centre of the highest quality could **cost between £86 million and £105 million**²¹, with additional need for revenue subsidy in the early years of operation; and
- the prospect of a Convention Centre which meets the city's aspirations being delivered in isolation by the private sector is extremely slight, primarily because of the relatively **slow expected rate of return on capital invested**. It is also highly unlikely that public funding of the magnitude required to deliver such a centre will be available given competing demands on the resources of the Council and other potential funders.

In considering the case for a proposal to the Casino Advisory Panel, the Council has taken advice on the scope for capitalised or ongoing operating surpluses from a RCEC to cross-subsidise the development of a Regional Convention Centre as part of a package of community benefits from licensing a RCEC in Newcastle:

¹⁹ KPMG report for One NorthEast, *Regional Assessment for a New Conference and Exhibition Centre – Phase 2*, June 2003.

²⁰ PwC, *Review of the Proposed Regional Convention Centre*, October 2005.

²¹ Davis Langdon LLP Initial Order of Cost Estimate for Convention Centre October 2005

- Professor Collins of Salford University provided a preliminary assessment²² that concluded that a sum of **£143m** could be available for investment in ancillary benefits;
- PwC applied a cautious sensitivity analysis to Professor Collin’s work resulting in a conservative estimate of **£70m**²³;

PwC also advised that the level of potential subsidy would be highly dependant on a number of unknown factors, including the attractiveness of the North East market to potential operators, the projected operating and capital cost base for a Convention Centre, and, crucially, the ability of the Council to generate strong competition between operators for the RCEC licence through a robust procurement process and strong negotiating position. PwC also noted that if a RCEC complex is located close to the Convention Centre, it is possible that significant synergies may be generated, both in terms of the development and subsequent operation of both facilities. This could lead to significant synergies and economies of scale.

The Council’s view is that, on the balance of evidence – including the commitment of at least one potential operator to deliver a Convention Centre as part of any investment in the city – licensing a RCEC in Newcastle is likely to provide the means to deliver a Convention Centre, which would provide major additional economic and employment benefits to the city but is unlikely to be financed or delivered any other way.

Other community benefits

In addition to seeking investment for a Convention centre, the Council would require competitors for a licence to address the following expectations:

- a comprehensive and fully-funded programme to **minimise the social risks and maximise the potential social benefits** of developing a RCEC and Convention Centre in Newcastle, including pre-emptive and ongoing action to tackle problem gambling risk, and pursue active local recruitment and training activities (see “Social impact” above);
- that the development will be of the **highest design quality**, consistent with NewcastleGateshead’s continuing development of exceptional public realm; and
- that the developer will bear the full costs of **infrastructure improvements** necessary for the efficient and sustainable development and operation of the facility in the context of the wider regeneration plans for the Discovery Quarter (or other location).

In light of further reflection and advice, the Council may in due course propose additional minimum requirements. However, one attraction of a competitive licensing process is the potential for private sector innovation to be harnessed for the public good, and the Council would therefore see merit in development proposals containing further creative ideas that would contribute to the regeneration and positive image of Newcastle as a city.

²² Collins, *Preliminary calculation to assess the present value of a casino development in Newcastle central.*

²³ PwC, *Assessment of the potential for a Regional Casino to cross-subsidise a Convention Centre.*

9. Unique characteristics

Newcastle City Council's proposal for a Regional Casino Entertainment Centre has several defining features:

- the contribution a RCEC can make to the **economic regeneration** of the city, especially through the major ancillary benefit of a Regional Convention Centre;
- the likely location of a landmark development in one of the North East's most important urban regeneration areas – the **Discovery Quarter** – with the potential to act as a focal point for further investment in the Quarter and provide a significant enhancement of the public realm;
- the significant number of **jobs** that would be created close to neighbourhoods of significant employment deprivation, balanced with sufficient buffers to access to discourage “ambient” trade;
- the excellent **transport and other infrastructure** that would serve the development, especially the high-quality and proximate air, rail and sea gateways; and
- the use of a **competitive licensing process** – on the optimum design of which the Council would take further expert advice – to secure the maximum overall ancillary community benefits for the city.

In isolation, none of these features is likely to be unique to Newcastle's proposal. The Council believes that they may be unique in combination, certainly in the North East if not nationally. Perhaps Newcastle's most distinguishing feature is the city's emerging strength and critical mass in leisure and business tourism and, crucially, the infrastructure to support further development. Newcastle is thus strongly placed to ensure that investment in a RCEC and Convention Centre delivers greater overall economic benefits – to the city, the wider region and the UK as a whole – than would be likely to accrue from other proposals.

International evidence – such as the *State of the Cities Report 2006* – demonstrates that successful economic regeneration means building on existing strengths and supporting the development of critical mass in a diverse range of industries. Newcastle is a growing, successful city in a region that is lagging economically. If the region as a whole is to prosper, a successful Newcastle will be at the heart of that prosperity. Newcastle has the location, the infrastructure with excellent rail, airport and other transport links the socioeconomic mix and – crucially – the thriving leisure economy and market to ensure that a Regional Casino and Entertainment Centre, and Regional Convention Centre, contribute fully to the economic and social life of the region.

Newcastle City Council
31st March 2006