



LITHGOW RETAIL SHOPPER SURVEY

June 2016

Prepared on behalf of Lithgow City Council

This Lithgow Retail Shopper Survey has been prepared for Lithgow City Council by:

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Contributing Agencies

The Lithgow Retail Shopper Survey is a key research paper prepared on behalf of Lithgow City Council with the support of NSW Department of Industry.

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ACKNOWLEDGMENTS

This Lithgow Retail Shopper Survey Report has been prepared by A.P. SHEERE CONSULTING for Lithgow City Council. A.P. SHEERE CONSULTING wishes to thank the Council staff, the local community and other stakeholders for their input into the development of the Report.

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1 Executive summary



In 2016, Lithgow City Council resolved to undertake a Retail Shopper Survey. This initiative would identify Lithgow's retail draw, where Lithgow residents shopped outside of the LGA, and identify potential gaps in retail supply/offers within the Lithgow retail centre.

As part of this project, a count of all vacant shops within the Main Street Precinct area was undertaken. This latest count undertaken in June 2016 identified 20 vacant shops. This represented a 67% increase since June 2015.

Survey results

The project area surveyed consisted of the Main Street hub of retail spend within the Lithgow Town centre known as the Lithgow Main Street Retail Precinct. Two representatives carried out 38 face-to-face surveys and an online survey resulted in an additional 176 participants.

Overwhelmingly the majority of respondents cited Lithgow as their most frequent shopping location, followed by Bathurst and the Blue Mountains.

The majority of people using the local retail services resided in Lithgow itself. Of the 184 Lithgow residents, 11.4% shopped outside the LGA the most - namely in Penrith and Bathurst.

14% of survey respondents resided outside the area with some making specific shopping trips to Lithgow. 47% of these respondents cited Lithgow as their predominant shopping venue. 45% of respondents usually residing in the Blue Mountains were most likely to do the majority of their shopping in Lithgow.

Opportunities identified

In the centre of Main Street there are opportunities to activate the back areas of properties and encourage 'shop-top housing' which would also help to generate foot traffic activity in Main Street.

Whilst mixed use businesses in the Pottery Estate adjacent to the Lithgow Valley Plaza also provide business opportunities. Liaising with realtors to encourage bulky goods retailers to this area could be beneficial.

The Retail Shopper Survey assessment indicates that the greatest retail opportunities potentially lie within the following sectors:

- Menswear
- Shoe shops
- Large electrical retailers

In addition to this, building on tourism/visitors/local residents and connecting all these markets with local events, Main Street's heritage, the cultural precinct, Eskbank House, Lake Pillans, Blast Furnace Park and back to the indoor pool centre at the opposite end of Main Street, could encourage greater retail expenditure and foot traffic.

Businesses also need to meet the needs of customers in particular visitors, such as being open over the weekend which is not currently common practice.

It is evident that some landlords have taken on board the need to maintain their property and this should be actively encouraged. It is also critical that the benefits of providing good customer service be promoted, understood and ultimately embraced by business owners.

Parking is not generally considered to be a major issue in Lithgow. However, connectivity between the various laneways and the Main Street itself could be promoted to encourage parking at the rear of premises.

Resources are needed to develop and implement an effective marketing plan and associated promotions/activities. These should be regularly targeted towards both the resident population and those residents and businesses located in neighbouring LGAs (e.g the Blue Mountains) and further afield. Local realtors should also be engaged to help promote the various retail opportunities identified.

The greatest threat to the Lithgow Retail Precinct is potentially four-fold - *the temptation to expand the current retail footprint which would result in the area becoming even more fragmented; the heavy reliance on the energy sector which results in a significant proportion of the local disposable income; the high ratio of low-income earners and the perceived/actual competition provided by neighbouring LGAs.*

The framework is essentially in place for Lithgow's Main Street to grow but it needs to be marketed appropriately and consistently.



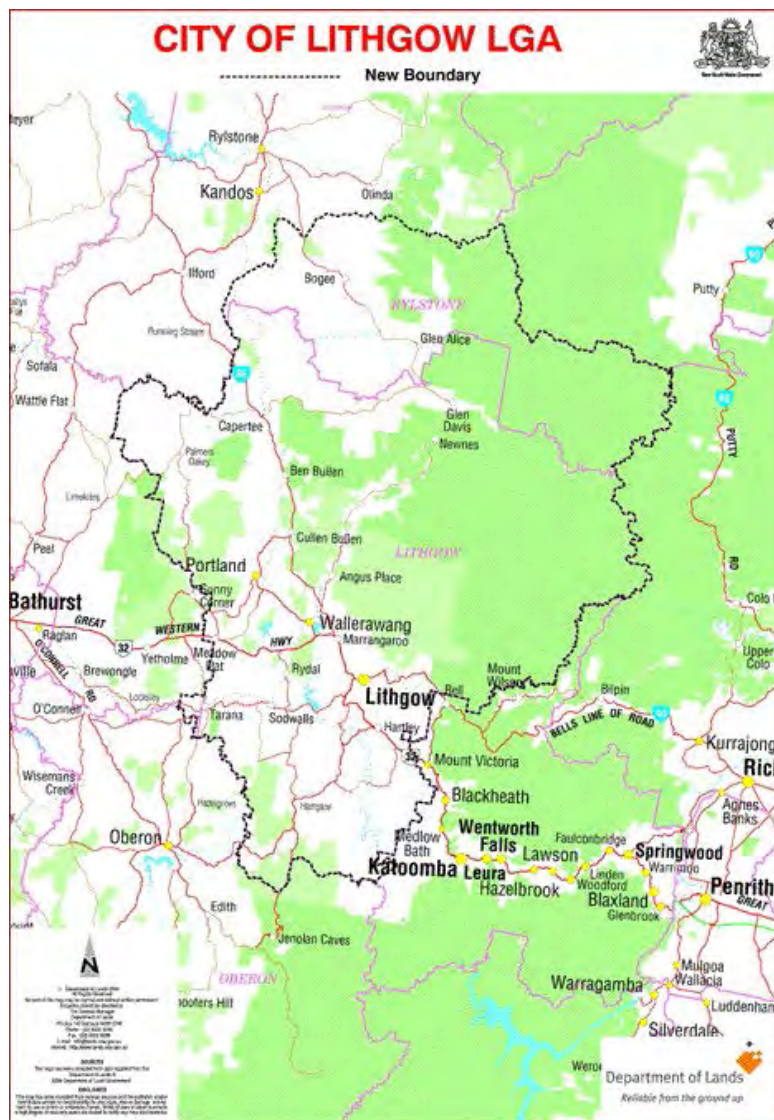
2 Introduction



2.1 Introduction to Lithgow City

The Lithgow Local Government Area covers a region of approximately 4,551 sq km, extending from Capertee and Wolgan Valley in the north, Little Hartley in the east, Hampton and Tarana in the south, and Meadow Flat in the west. The majority of the resident population is located in the town of Lithgow followed by Portland and Wallerawang. According to the 2011 Census, there were 20,161 people resident within the region.

Figure 1.0 Lithgow City LGA boundary



Source: Lithgow City Council

2.2 Lithgow's Strategic location in the Central West of NSW

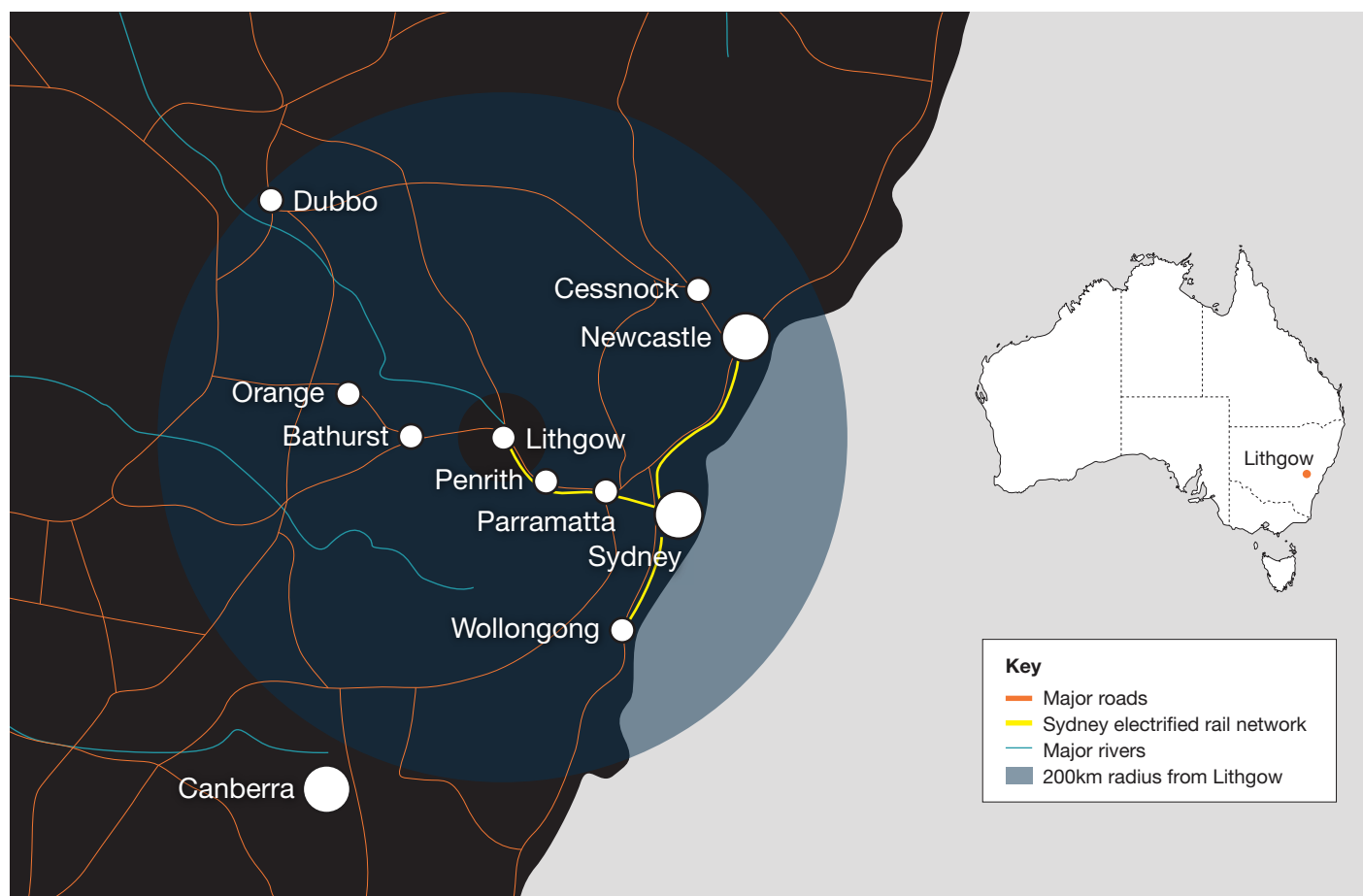
On the western fringe of the Blue Mountains, Lithgow is at the crossroads of four major highways, is on the western rail line, and is a gateway to both Sydney and Central West NSW.

Lithgow is located just two hours drive from Sydney and Goulburn and 40 minutes from Bathurst. Lithgow has become a popular meeting place between the Central West, the Blue Mountains and Sydney. Lithgow is, and always has been, a centre for enterprise and entrepreneurial activities. The mining and energy sectors, along with manufacturing and retail, dominate the economic base today.

Lithgow is also served by the electrified rail service with direct links to Sydney's CBD. Main Street is the principal retail strip and comprises the main commercial area and access to the railway station.

Lithgow is well located to drive population growth to regional areas as it is unrivalled in the Central West with its proximity to Sydney's CBD.

Figure 2.0 Lithgow's strategic location in Australia



Source: Lithgow Economic Development Strategy 2015



3 Economic summary

ERP figures estimate that Lithgow's resident population reached 21,416 persons in June 2015

Retail and business centres are generally formed by the size of the local population, relative affluence, age structure and the available workforce.¹

3.1 Economic profile summary

The Lithgow LGA had an estimated resident population of 20,161 persons according to the ABS Census in 2011. This represented an increase of 401 persons or 2% between 2006 and 2011.

3.1.1 Estimated residential population

The most comprehensive population count available in Australia is derived from the Census of Population and Housing conducted by the Australian Bureau of Statistics every five years. The Australian Bureau of Statistics issues 'Estimated Resident Population' (ERP) numbers for all Local Government Areas on a more regular basis to provide an indication of population changes without having to wait another five years.

The ERP is based on the usual residence population and includes adjustments for Census undercount, Australian residents who were temporarily overseas on Census night, and backdates the population to 30 June. Each update takes into account births, deaths and both internal and overseas migration. ERP figures dated June 2015 indicate that between 2014 and 2015 the population of the Lithgow LGA grew by 0.5% reaching 21,416 persons. During the same period the NSW Central West region grew by 0.72% with the LGAs of Orange, Bathurst and Cabonne experiencing the most population growth at 1.8%, 1.7% and 1.6% respectively. See Table 1.0.

¹ SGS Economics, Lithgow Retail Strategy April 2010

Table 1.0 ABS Estimated Resident Population by LGA, June 2015

LGA	ERP at 30 June 2015										Change 2014-2015	
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	No.	% change
Bathurst	36916	37272	37904	38848	39484	39960	40368	41051	41652	42231	683	1.7
Cabonne	12634	12706	12799	12929	13071	13211	13476	13695	13767	13860	219	1.6
Lithgow	20186	20277	20352	20621	20732	20850	21003	21118	21236	21416	115	0.5
Oberon	5179	5166	5161	5192	5207	5209	5221	5270	5326	5318	49	0.9
Orange	36374	36801	37401	37904	38660	39419	40160	40869	41406	41809	709	1.8
NSWCW	165475	166390	167796	169878	171705	173401	175323	176972	178762	180049	1287	0.72

Source: ABS Regional Population Growth June 2015 (Catalogue 3218), A.P. SHEERE CONSULTING, 2016

3.1.2 NSW Department of Planning

The NSW Department of Planning prepared population projections for NSW in 2014 taking into account findings from the 2011 Census of Population and Housing.

It should be noted, however, that these projections are sometimes considered to be controversial and should not be viewed in isolation. Economic conditions can change unexpectedly which will impact upon population numbers hence these projections should be viewed purely as the estimates they are. The ABS itself does not publish data on population projections to the LGA level. The ABS only publishes the Estimated Resident Population data on a regular basis at this level.

The resident population for most of the LGAs within the NSW Central West region is predicted to experience marginal growth or slight decline between 2011 and 2031. Bathurst and Cabonne are predicted to record the greatest average annual growth of 1.45% and 1.23% respectively over the next 20 years. According to the NSW Department of Planning, Lithgow is expected to record an average annual decline of 0.06% (or 250 persons) over this 20 year period. See Table 1.1.

3.1.3 Population projections using ERP data

Using the ERP figures published by the ABS it is possible to gain an alternative view of potential population increases/decreases. Table 1.2 illustrates how by using the ERP figures, the Lithgow population would marginally increase

Table 1.1 NSW Department of Planning population projections, 2014

LGA	Population (No)					Average Annual Growth (2011-2031)	
	2011	2016	2021	2026	2031	Number	%
Bathurst	39,950	42,900	45,900	48,800	51,550	11,600	1.45%
Blayney	7,200	7,400	7,550	7,650	7,800	600	0.42%
Cabonne	13,200	14,050	14,850	15,650	16,450	3,250	1.23%
Cowra	12,500	12,300	12,000	11,650	11,200	-1,300	-0.52%
Forbes	9,450	9,350	9,200	9,000	8,750	-700	-0.37%
Lachlan	6,700	6,450	6,150	5,850	5,500	-1,200	-0.89%
Lithgow	20,850	21,000	21,000	20,900	20,600	-250	-0.06%
Oberon	5,200	5,200	5,150	5,100	4,950	-250	-0.24%
Orange	39,400	41,250	43,050	44,750	46,250	6,850	0.87%
Parkes	15,100	15,250	15,350	15,450	15,500	400	0.13%
Weddin	3,750	3,650	3,500	3,400	3,250	-500	-0.67%
NSW Central West	173,300	178,800	183,700	188,200	191,800	18,500	0.53%
Regional NSW	1,682,400	1,736,750	1,786,850	1,830,550	1,865,800	183,400	0.54%
NSW	7,218,550	7,708,850	8,230,400	8,739,950	9,228,350	2,009,800	1.39%

Source: New South Wales State and Local Government Area Population, Household and Dwelling Projections: 2014 Final.
Extract from RDACW Economic Profile 2014 by A.P. SHEERE CONSULTING.

with an average annual growth of 0.34% between 2003 and 2013. This figure has been used to provide alternative population projections for the Lithgow LGA which estimates that the Lithgow population may reach 22,315 in 2031.

Table 1.2 Population projections using ERP data, 2011- 2031

	Population projections					Growth (2011-2031)
	2011 (ABS ERP figure)	2016	2021	2026	2031	Number
Lithgow	20,850	21,207	21,570	21,939	22,315	+1,465

Source: ABS Regional Population Growth June 2013 (Catalogue 3218), A.P. SHEERE CONSULTING.

Population counts, both current and future, are a key influence on retail demand but need to be assessed alongside, employment status and income levels.

3.2 Target population growth rate

The 2007 Lithgow Strategic Plan set an annual growth rate target of between 1-2% over a 20 year period. Both the 2006-11 Social Plan and 2010-2014 Economic Development Strategy highlighted that caution must be undertaken with such a high population increase due to its potential impact upon a range of social and economic factors.

The Land Use Strategy 2010-2030 recommends that Council revise the population targets of the 2007 Strategic Plan down to a more realistic and achievable rate of between 0.5% and 1%. 0.5% should still be considered as ambitious but potentially achievable when taking into account the ERP data that shows an average annual increase of 0.34% - which is 0.16% less than the lowest projection of 0.5%.

3.3 Age distribution

Lithgow has a comparatively large resident population which is of retirement age with 18.1% of residents aged over 65 years compared to 14.7% in NSW and 13.9% in Bathurst (see Table 1.3 and Figure 3.0). The median age at 42 years is also above NSW's median of 38 years but again almost equal to the NSW Central West figure and Regional NSW, of 41 years.

The regional centres of Bathurst and Orange have a relatively younger population, compared to neighbouring LGAs, with a median age of 36 years. This is mainly due to the higher proportion of residents between the ages of 15-24.

According to the NSW Planning projections issued in 2014 the proportion of older residents within the NSW Central West region is expected to increase over the next 20 years. This is consistent with the national trend of an aging population.

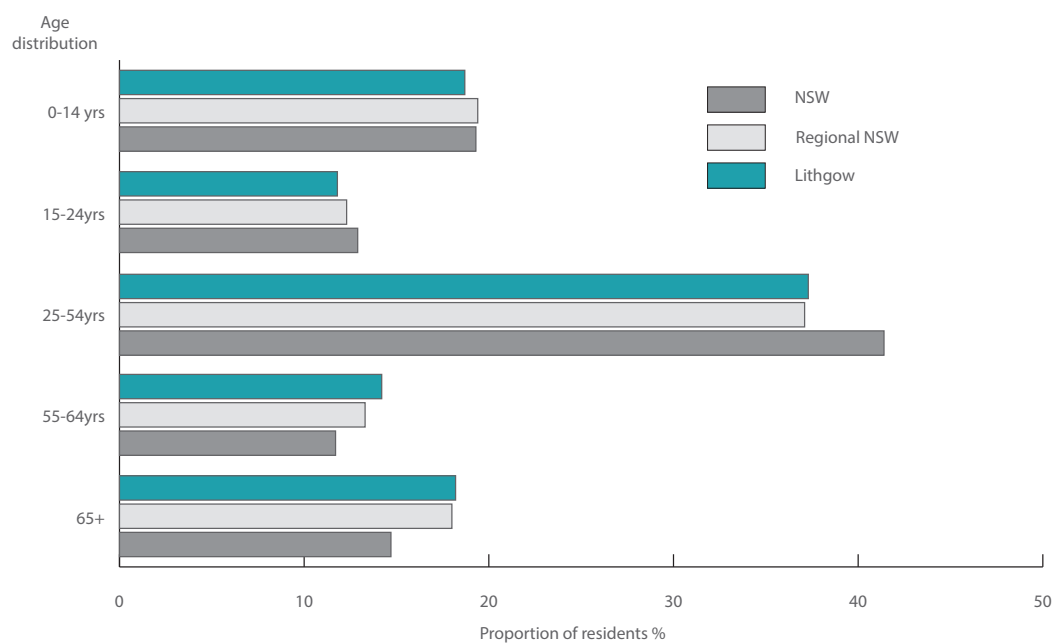
These population projections and projected age profiles of the Lithgow LGA are shown in Table 1.4. The table illustrates that the greatest change will occur in the 65+ age bracket where a projected increase of 12.6% is expected between 2011 and 2031. The greatest decline is expected to be from families or the following age groups: 0-14 yrs, 15-24 yrs and 45-54yrs - families with mainly older children.

Table 1.3 Population Age Distribution, 2011

Area	0-14	15-24	25-54	55-64	65+	Median age
Bathurst	20.8%	16.1%	37.6%	11.6%	13.9%	36
Cabonne	21.9%	10.5%	36.1%	13.8%	17.7%	42
Lithgow	18.7%	11.8%	37.3%	14.2%	18.1%	42
Oberon	19.2%	12.9%	34.7%	16.2%	17.0%	41
Orange	22.1%	13.7%	38.5%	11.2%	14.4%	36
NSW Central West (av)	20.8%	11.9%	35.7%	13.5%	18.1%	41
Regional NSW	19.4%	12.3%	37.1%	13.3%	18.0%	41
NSW	19.3%	12.9%	41.4%	11.7%	14.7%	38

Source: ABS Census 2011, Profile id

Figure 3.0 Lithgow Population Age Distribution 2011



Source: ABS Census 2011, Profile id, A.P. SHEERE CONSULTING 2015

Households consisting of older people, particularly those of retirement age, generally have lower disposable incomes, thus leading to a lesser demand for retailing.



Table 1.4 Projected Population Age Distribution - Lithgow, 2011-2031

Age bracket	2011	2016	2021	2026	2031	Change 2011-2031
0-14 yrs	18.7%	17.7%	17.4%	16.1%	15.8%	-2.9%
15-24 yrs	12.2%	10.7%	9.8%	9.6%	9.2%	-3.0%
25-34 yrs	10.3%	11.0%	10.5%	9.4%	8.5%	-1.8%
35-44 yrs	12.5%	11.5%	11.0%	11.5%	11.4%	-1.1%
45-54 yrs	14.9%	13.4%	12.4%	11.8%	11.4%	-3.5%
55-64 yrs	13.7%	14.6%	15.0%	13.9%	13.3%	-0.4%
65+ yrs	17.7%	21.2%	24.0%	27.6%	30.3%	+12.6%

Source: NSW Department of Planning 2014. A.P. Sheere Consulting, 2015

3.4 Employment status

3.4.1 Labour force participation rates based on Census 2011

Lithgow City's employment statistics are an important indicator of socio-economic status. The levels of full or part-time employment, unemployment and labour force participation indicate the strength of the local economy and social characteristics of the population. Employment status is linked to a number of factors including age structure, which influences the number of people in the workforce; the economic base and employment opportunities available in the area and; the education and skill base of the population.

Workforce Participation Rates are based upon the resident population over the age of 15 years who are either employed or are actively looking for work. The number of people who are no longer actively searching for work would not be included in the participation rate. A region's Workforce Participation Rate helps to identify local workforce availability which in turn provides opportunities for businesses looking to expand and new businesses looking to establish themselves in the region.

It also reflects the relative advantage and productivity of an economy as the rates indicate the level of capable workers that are contributing to the economy. A falling participation rate can also highlight the demographic composition of a region with an aging population resulting in fewer people within the workforce itself. A low participation rate can indicate disharmony or recession in an economy with people of working age opting to not actively look for work. See Table 1.5.

Table 1.5 Labour Force Participation Rates 2006-2011

LGA	2006	2011	Change (%)
Bathurst	60.5%	60.7%	0.2%
Cabonne	61.5%	62.5%	1.0%
Lithgow	53.1%	53.0%	-0.1%
Oberon	61.4%	60.8%	-0.6%
Orange	59.8%	60.9%	1.1%
NSW CW (av)	58.5%	57.6%	-0.9%
Regional NSW	55.9%	56.4%	0.5%
NSW	58.9%	59.7%	0.8%

Source: ABS Census 2006 and 2011, Profile id, A.P. SHEERE CONSULTING

As shown in Table 1.5, Lithgow had a comparatively low participation rate of 53% in 2011 which declined by 0.1% from 2006. Cabonne had a participation rate of 61.5%, followed by Oberon (61.4%) and Bathurst (60.5%).

Household incomes are strongly related to labour force participation rates, thus lower rates of labour force participation are often associated with lower incomes and relatively less demand for retailing.

3.4.2 Labour force current estimates

The local labour force includes all employed people who are resident in the local area regardless of where they work. Their characteristics inform us about the skills that are available locally, even if they are not currently employed in the local economy.

Table 1.6 details the labour force estimates issued by the Department of Education, Employment and Workplace Relations (DEEWR), between 2011 and 2016. The table illustrates the various changes in labour force rates characteristic of an economy heavily influenced by fluctuating markets such as mining.

Table 1.6 Lithgow's Labour force, 2011 – 2016

LGA	March 2011	March 2012	March 2013	March 2014	March 2015	March 2016
Lithgow	22,110	20,052	20,505	22,416	21,614	23,054
Bathurst	10,388	9,371	9,548	10,322	9,876	10,516
Oberon	2,872	2,573	2,603	2,817	2,706	2,882

Source: DEEWR Small Area Labour Markets, 2016, A.P. SHEERE CONSULTING 2016

3.4.3 Unemployment rates

The unemployment rate is derived from the ABS labour force survey and Centrelink data and compiled by the Department of Education, Employment and Workplace Relations. According to DEEWR, in March 2016, the Lithgow LGAs had an unemployment rate of 9.3%, considerably above the NSW State average of 5.3%. See Table 1.7 below.

Table 1.7 Lithgow's Unemployment rates, 2011 – 2016

LGA	March 2011	March 2012	March 2013	March 2014	March 2015	March 2016
Lithgow	6%	7.5%	10%	9.2%	9.9%	9.3%

Source: DEEWR Small Area Labour Markets, 2016, A.P. SHEERE CONSULTING 2016

3.4.4 Resident employment by industry

Those sectors employing most of Lithgow's residents according to Census 2011 data were Mining (998) followed by Health Care and Social Assistance (885) and Retail Trade (802). See Table 1.8. While mining is an export industry, both the retail trade and health care and social assistance are driven by local population. Retail Trade resident employment fell by 7.3% between 2006 and 2011.

Table 1.8 Lithgow's Resident Employment by Industry, 2006 – 2011

Industry sector of employment	2006 Number	2011 Number	2011 % of total	# Change 2006 to 2011
Agriculture, Forestry and Fishing	261	216	2.7	-45
Mining	774	998	12.4	+224
Manufacturing	631	542	6.7	-89
Electricity, Gas, Water and Waste Services	392	350	4.3	-42
Construction	475	471	5.8	-4
Retail Trade	865	802	10.0	-63
Wholesale trade	142	156	1.9	+14
Accommodation and Food Services	676	671	8.3	-5
Transport, Postal and Warehousing	406	464	5.8	+58
Information Media and Telecommunications	56	52	0.6	-4
Financial and Insurance Services	142	133	1.7	-9
Rental, Hiring and Real Estate Services	86	77	1.0	-9
Professional, Scientific and Technical Services	217	247	3.1	+30
Administrative and Support Services	243	274	3.4	+31
Public Administration and Safety	637	681	8.5	+44
Education and Training	464	503	6.2	+39
Health Care and Social Assistance	765	885	11.0	+120
Arts and Recreation Services	74	81	1.0	+7
Other Services	260	288	3.6	+28
Inadequately described or not stated	151	167	2.1	+16
Total employed persons aged 15+	7,717	8,058	100.0	+341

Source: ABS CENSUS data 2006 and 2011 Based on Place of Usual Residence, A.P. SHEERE CONSULTING

3.4.5 Persons with workplace in Lithgow

Journey to work data compiled by the ABS 2011 Census and NSW Transport Data Centre also indicates where people travel from to work in Lithgow. Journey to Work data shows how many workers live within the Lithgow LGA, how many commute from other areas and which areas they commute from. Understanding where workers reside assists in planning and advocacy for roads and public transport provision but also helps to clarify economic and employment drivers across areas and assists in understanding the degree to which the Lithgow LGA provides local employment.

According to the Census 2011, 7,480 persons worked in the Lithgow LGA. Of these, 6,144 people or 82.1% also lived in the Lithgow LGA (see Table 1.9). The Blue Mountains and Bathurst attracted the most workers from outside the Lithgow LGA.

Table 1.9 Origin of workers in Lithgow 2011

Local Government Area origin of workers in Lithgow (top 8 LGAs)	Number of workers in Lithgow LGA	% 2011
Lithgow	6,144	82.1
Blue Mountains	535	7.2
Bathurst Regional	397	5.3
Mid-Western Regional	59	0.8
Oberon	53	0.7
Hawkesbury	38	0.5
Penrith	14	0.2
Orange	12	0.2

Source: ABS Census 2011, Profile id, A.P. SHEERE CONSULTING 2016

3.4.6 Destination of Lithgow retail workforce

Table 1.10 illustrates that according to ABS Census 2011 data, 82% of Lithgow working residents employed in the retail sector worked in the Lithgow LGA, followed by the Blue Mountains and Bathurst.

Table 1.10 Destination of Lithgow retail workforce

Destination - LGA	Retail trade 2011	% of total
Lithgow	646	82
Blue Mountains	49	6
Bathurst	42	5
Midwestern	5	0.6
Oberon	3	0.4
Penrith	7	0.9
Hawkesbury	5	0.6
Other	32	4
Total	789	

Source: ABS Census 2011, A.P. SHEERE CONSULTING 2016

3.5 Lithgow LGA Business Counts by Industry and Employees

ABS data on business size and turnover is available for businesses registered in Lithgow. According to the 2015 ABS/ABR Business register there were approximately 1,262 registered businesses in Lithgow (SLA2).

Within Lithgow LGA, 98 businesses were recorded as classified in the retail trade sector, the majority of which were non-employing. In total, 78% of retail businesses were either non-employing or employed 1-4 persons. 61% of all registered businesses were non-employing followed by those employing 1-4 persons at 27%. It is important to note that for large companies it is possible that business located in Lithgow LGA may be registered in another location, such as where the company's head office is located. The data does provide a good indication of the mix and size of local businesses. See Table 1.11.

Table 1.11 Lithgow's Registered Business Count by industry, 2015

Industry sector of employment	Non employing	1-4	5-19	20-199	200+	Total
Agriculture, Forestry and Fishing	214	23	6	0	0	243
Mining	6	3	0	0	0	9
Manufacturing	24	17	12	0	0	53
Electricity, Gas, Water and Waste Services	6	0	0	0	0	6
Construction	133	88	16	3	0	240
Wholesale Trade	14	7	7	0	0	28
Retail Trade	42	34	19	3	0	98
Accommodation and Food Services	26	35	21	3	0	85
Transport, Postal and Warehousing	58	40	9	3	0	110
Information Media and Telecommunications	0	0	0	0	0	0
Financial and Insurance Services	39	3	3	3	0	48
Rental, Hiring and Real Estate Services	75	10	5	0	0	90
Professional, Scientific and Technical Services	38	24	9	0	0	71
Administrative and Support Services	14	9	0	0	0	23
Public Administration and Safety	3	3	0	0	0	6
Education and Training	9	3	6	0	0	18
Health Care and Social Assistance	34	11	15	3	0	63
Arts and Recreation Services	9	0	0	0	0	9
Other Services	18	25	12	0	0	55
Inadequately described or not stated	4	0	3	0	0	7
Total employed persons aged 15+	766	335	143	18	0	1262

Source: 81650 Counts of Australian Businesses, including Entries and Exits, Jun 2011 to Jun 2015, A.P. SHEERE CONSULTING

Note. SLA2 boundaries do not necessarily match LGA boundaries. There may be some discrepancies between the two areas.

3.6 Household income

3.6.1 Weekly gross individual income levels for Lithgow resident workforce 2011

Table 1.12 and Figure 4.0 illustrate that in 2011, the largest percentage of Lithgow's working population (14%) either earned between \$200-\$299 per week or \$300-\$399, followed by \$400 - \$599 per week (12.8%). Most people in NSW earn \$400-\$599 per week. The Department of Human Services defines 'low income earners' as those individuals earning gross weekly income which is less than \$527.00. Therefore, approximately 50% of the resident workforce are low income earners.

5.2% earn over \$2,000 per week which can be partly attributed to the high numbers of resident workforce working in the Mining industry which is historically a well paid industry sector in Lithgow. This is also more than the 3.9% earning \$2,000 or more in Regional NSW.

Table 1.12 Gross weekly income levels for Lithgow residents, 2011

Weekly gross income	2011		
	Number	%	Regional NSW %
Negative Income/ Nil income	1,087	6.6	6.5
\$1-\$199	1,194	7.3	7.6
\$200-\$299	2,302	14.0	13.0
\$300-\$399	2,286	14.0	12.9
\$400-\$599	2,091	12.8	13.7
\$600-\$799	1,531	9.3	10.8
\$800-\$999	949	5.8	7.6
\$1000-\$1249	965	5.9	6.6
\$1250-\$1499	624	3.8	4.3
\$1500-\$1999	901	5.5	5.3
\$2000 or more	858	5.2	3.9
Not stated	1,599	9.8	7.7
Total persons aged 15+	16,387	100.0	100.0

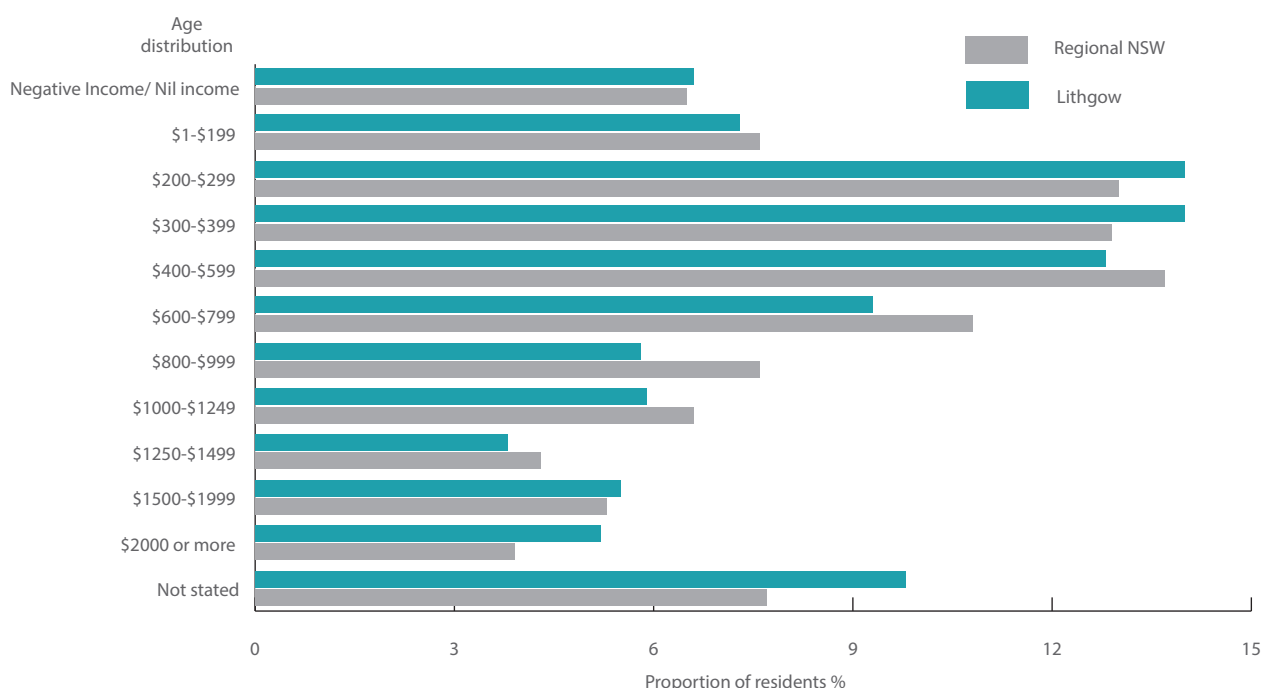
Source: ABS Census 2011, Profile id, A.P. SHEERE CONSULTING 2016

Levels of household income provides and indication of the capacity of the local community to spend within the LGA and therefore, support local businesses.

Those with a greater capacity to spend are likely to be employed in the Mining sector. However, this sector is regularly effected by changing markets which subsequently effect spending capacity in this income bracket, which is then felt by retailers through reduced spending.

Figures identifying the number of residents receiving Social Services payments is also an indicator of local spending capacity. See Section 3.6.2.

Figure 4.0 Gross weekly income levels for Lithgow residents, 2011



Source: ABS Census 2011, Profile id, A.P. SHEERE CONSULTING 2016

3.6.2 Department of Social Services data, 2013-14

Department of Social Services data indicates that during December 2015, at least 14,799 benefit payments were made to Lithgow residents. This represented an increase of 120 payments since December 2014 or 0.8%. The majority of payments were for Pensioner Concession Cards at 39.4% followed by Age Pension at 23.3%. Payments which increased the most during the same period were 'Low income card' (20%) and Youth Allowance student and apprentice (17.9%). See Table 1.13.

Table 1.13 Social Services payments made to Lithgow residents, Dec 2014 to Dec 2015

Welfare payment type	Dec 14	Mar 15	Jun 15	Dec 15	Dec 15 %	Change Dec 14 to Dec 15	% change
Age Pension	3313	3351	3373	3450	23.3	137	4.1
Carer allowance	764	756	771	744	5.0	-20	-2.6
Disability support pension	1341	1338	1353	1284	8.7	-57	-4.3
Healthcare card	1520	1596	1526	1477	10.0	-43	-2.8
Low income card	215	238	268	258	1.7	43	20.0
Newstart allowance	1027	1030	1071	1032	7.0	5	0.5
Parenting Payment Partnered	108	109	95	93	0.6	-15	-13.9
Parenting Payment Single	379	378	377	374	2.5	-5	-1.3
Pensioner Concession Card	5756	5831	5875	5828	39.4	72	1.3
Youth Allowance other	178	178	193	167	1.1	-11	-6.2
Youth Allowance student and apprentice	78	88	100	92	0.6	14	17.9
Total	14679	14893	15002	14799	100.0	120	0.8

Source: Department of Social Services, 2014-15, A.P. SHEERE CONSULTING

3.7 Industry GRP Contribution (\$m) in the Lithgow LGA 2014

Industry Gross Regional Product (GRP) contribution identifies the value of final goods and services produced in the local economy and provides an insight into the size of the economy and the key industries that are creating value in the region. Industry GRP also highlights any reliance and dominance of particular sectors within a region.

Gross Regional Product contributions for the Lithgow LGA in 2014 estimated that in 2013-2014 the gross regional product for Lithgow Local Government Area was approximately \$1,540.9 million.

The Mining sector by far contributed the most, at \$625.32 million or 40.6% of the total GRP. The Mining sector also provided the most jobs locally at 14.9% (2011). The Construction sector contributed the second most GRP at \$186.55 million or 12.1% of the total GRP but only provided 4.6% of the total number of local jobs. Retail Trade contributed a comparatively low GRP at 2.6%. See Table 1.14.

Table 1.14 GRP contributions by industry type, 2013-14

Industry Sector	GRP Contribution (\$m)	% Contribution 2013-14	% Share of jobs in Lithgow LGA
Agriculture, Forestry and Fishing	21.55	1.4	2.6%
Mining	625.32	40.6	14.9%
Manufacturing	63.12	4.1	6.7%
Electricity, Gas, Water and Waste Services	110.43	7.2	5.1%
Construction	186.55	12.1	4.6%
Wholesale Trade	19.63	1.3	2.0%
Retail Trade	39.77	2.6	9.6%
Accommodation and Food Services	39.60	2.6	8.5%
Transport, Postal and Warehousing	51.25	3.3	4.9%
Information Media and Telecommunications	8.73	0.6	0.4%
Financial and Insurance Services	26.05	1.7	1.7%
Rental, Hiring and Real Estate Services	13.34	0.9	1.0%
Professional, Scientific and Technical Services	18.13	1.2	2.7%
Administrative and Support Services	33.78	2.2	3.0%
Public Administration and Safety	91.57	5.9	9.6%
Education and Training	50.81	3.3	7.3%
Health Care and Social Assistance	61.18	4.0	10.7%
Arts and Recreation Services	4.14	0.3	0.7%
Other Services	17.93	1.2	3.4%
(Ownership of dwellings)	58.02	3.8	-
Total (\$m)	\$1,540.90	100.0	-

Source: NSW Central West Regional Economic Profile - NIEIR, A.P. SHEERE CONSULTING

3.8 Tourism

According to figures taken from Tourism Research Australia (TRA) in 2013, 127,000 domestic overnight tourists and 291,000 domestic day tourists traveled to Lithgow Local Government Area annually (based on a three to four year average to June 2013). These figures increased to 135,000 domestic overnight tourists (or 6.3%) and 312,000 domestic day tourists (or 7.2%) according to figures taken from Tourism Research Australia (TRA) in 2014. In addition to this there were some 300,000 international visitors to Lithgow spending an average of \$544 per person in 2014.

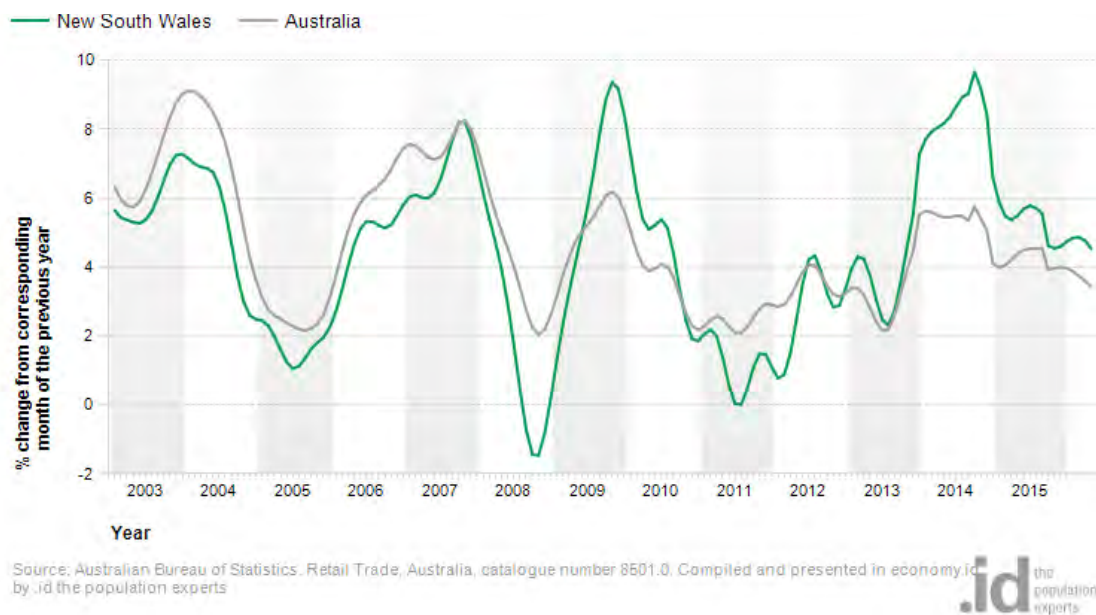
Domestic overnight visitors spent on average \$158 per night. Of these visitors we estimated that 40% will, at some point in their trip, visit the town centre as this is the only town within the LGA with significant retail, recreation and accommodation facilities. According to 2014 TRA figures, 44% of overnight visitors eat out at restaurants during their stay. Domestic day trippers (staying up to 4 hours in Lithgow) spend on average, \$87 per head (or \$21.75 per hour).

Tourists are an important customer market for retailers as they are more likely to spend during a visit as part of the whole 'visitor' experience.

3.9 Retail trade turnover

Retail Trade turnover is an important indicator of economic health. Increasing retail turnover can indicate a high level of consumer confidence and increased money in the economy. Retail Trade is not available at the local level, so the data presented here is annual percentage change for the state of New South Wales, updated monthly. In April 2016, the retail trade estimate for New South Wales rose 4.54% from the previous year.

Figure 5.0 Retail trade - trend estimates



Source: Profile id, 2016



4 Survey structure

214 people in total responded to the Lithgow Retail Shopper Survey

4.1 Purpose of the report

In 2016, Lithgow City Council resolved to undertake a retail shopper survey. This initiative would identify Lithgow's retail draw, where Lithgow residents shopped outside of the LGA, and identify potential gaps in retail supply/offerings within the Lithgow retail centre.

4.2 Lithgow Retail Centre Shopper Survey Area

The project area surveyed consisted of the Main Street hub of retail spend within the Lithgow Town centre known as the Lithgow Main Street Retail Precinct. This area is illustrated in Figure 6.0 and is defined by Main Street between Lithgow Street and Bridge Street also including business activities along located Mort Street, Railway Parade and Bridge Street.

The Lithgow Main Street Retail Precinct is anchored by a Woolworths supermarket, government services, numerous financial institutions, hotels, and health service providers, as well as a high number of independent retailers with a focus on womens fashion, cafes, and health and beauty.

Figure 6.0 Lithgow Main Street Retail Precinct



Source: Lithgow City Council, 2016



4.3 Project objectives

A summary of the project objectives are:

1. Identify Lithgow's retail draw:
 - Identify Lithgow's current retail draw from people using the Lithgow's main retail centre and who usually reside elsewhere.
 - Identify what products and services these visitors are purchasing and using.
2. Identify where Lithgow residents shop outside of the LGA and for what products and services.
3. Identify the potential gaps in retail supply/offerings within the Lithgow retail centres.

4.4 Lithgow Retail Centre Shopper Survey Report methodology

4.4.1 Information review

The initial stage of this project was to review existing information and conduct additional investigations to adequately inform the development of the Lithgow Retail Centre Shopper Survey in line with the project objectives. This review included:

- Review of Council's 2010 Business and Retail Strategy and in particular the survey design and reporting arising from the Shopper Survey conducted as part of that Strategy
- Reference to Councils 2015-2020 Economic Development Strategy (adopted 2016)
- Reference to 2014 Lithgow Environmental Plan
- Relevant regional strategies and investigations
- Engagement with commercial stakeholders including real estate agents and retailers
- Engagement with shoppers (residents and non-residents)
- Review of latest shop count data for Main Street Lithgow

4.4.2 Lithgow Retail Centre Shopper Survey Delivery Program

Following the document review, a Lithgow Retail Centre Shopper Delivery Program was written and submitted for approval. See Appendix A. The program outlined the survey methodology and execution which is detailed in the following sections.



4.4.3 Survey design process

The methodology and design for the Lithgow Retail Centre Shopper Survey considered a number of elements including:

- Determination of a valid and representational survey sample size
- Development of survey questions relating to shoppers residing out of the Lithgow LGA
- Development of survey questions relating to shoppers residing within the Lithgow LGA
- Development of survey questions relating to identifying retail gaps/opportunities

The Retail Centre Shopper Survey was designed to be easy to follow, brief and therefore promptly executable to limit the time required by survey participants to respond. The survey questions are shown in Figure 7.0.

4.4.4 Survey elements

4.4.4.1 Face-to-face surveys

Two representatives carried out face-to-face surveys - the consultant and Lithgow City Council's Economic Development Officer. There were no specific demographics targeted but a range of 35-40 surveys was preferred.

The location selected was within Cook Street Plaza on Main Street and was undertaken between 12-2pm on Tuesday 31 May 2016. 38 surveys in total were fully completed by members of the public.

4.4.4.2 Online Survey Monkey

An online 'survey monkey' was also developed to extend the survey participation rate. Identical questions were asked so that they could be assessed in conjunction with the face-to-face respondents.

Council's business database was used to alert potential participants of the shopper survey. In total 176 online surveys were completed by people working in the Lithgow LGA. Employees of both small businesses and the larger employers in the region participated.

Figure 7.0 Sample of the Lithgow Shopper Survey

LITHGOW RETAIL SHOPPER SURVEY

Part 1

	Lithgow	Blue Mountains	Wang	Portland	Bathurst	Mudgee/Orange	Penrith	Sydney
1a. Where do you live?								

Part 2

2a. Where do you shop most often?	ONE ANSWER ONLY			
Lithgow				
Blue Mountains				
Wallerawang				
Portland				
Bathurst				
Mudgee/Orange				
Penrith				
Sydney				
2b. How frequently do you shop there?	Several times a week	Weekly	Fortnightly	Monthly

2c. What shopping do you mainly do there?		2d. How much do you spend during an average trip there? W/F/M
1 Food/Grocery shopping		\$
2 Clothing or footwear shopping		
3 Gifts and homewares		
4 Electrical goods		
5 Using service: bank, post office, Dr, hairdresser		
6 Eating out/restaurant/bars/cafe		
7 Social/leisure/entertainment (e.g cinema/show/theatre)		

Part 3

3a. Where else do you shop (most often)?	ONE ANSWER ONLY			
Lithgow				
Blue Mountains				
Wallerawang				
Portland				
Bathurst				
Mudgee/Orange				
Penrith				
Sydney				
3b. How frequently do you shop there?	Several times a week	Weekly	Fortnightly	Monthly

3c. What shopping do you do there?		3d. How much do you spend during an average trip there? W/F/M
1 Food/Grocery shopping		\$
2 Clothing or footwear shopping		
3 Gifts and homewares		
4 Electrical goods		
5 Using service: bank, post office, Dr, hairdresser		
6 Eating out/restaurant/bars/cafes		
7 Social/leisure/entertainment (e.g cinema/show/theatre)		

3e. What other shops would you like in Lithgow?	
---	--

4.4.4.3 Main Street shop count

As part of this project, a count of all vacant shops within the Main Street Precinct area was undertaken. This was to see whether numbers had increased or decreased since the last review which was undertaken in June 2015.

In total 205 outlets/premises were assessed providing an up-to-date snapshot of the retail mix currently available in the study area retail precinct.

Table 2.0 shows that the number of vacant shops along the main retail strip between Lithgow Street and Bridge Street. This latest count undertaken in June 2016, identified 20 vacant shops which represents a 67% increase since June 2015.

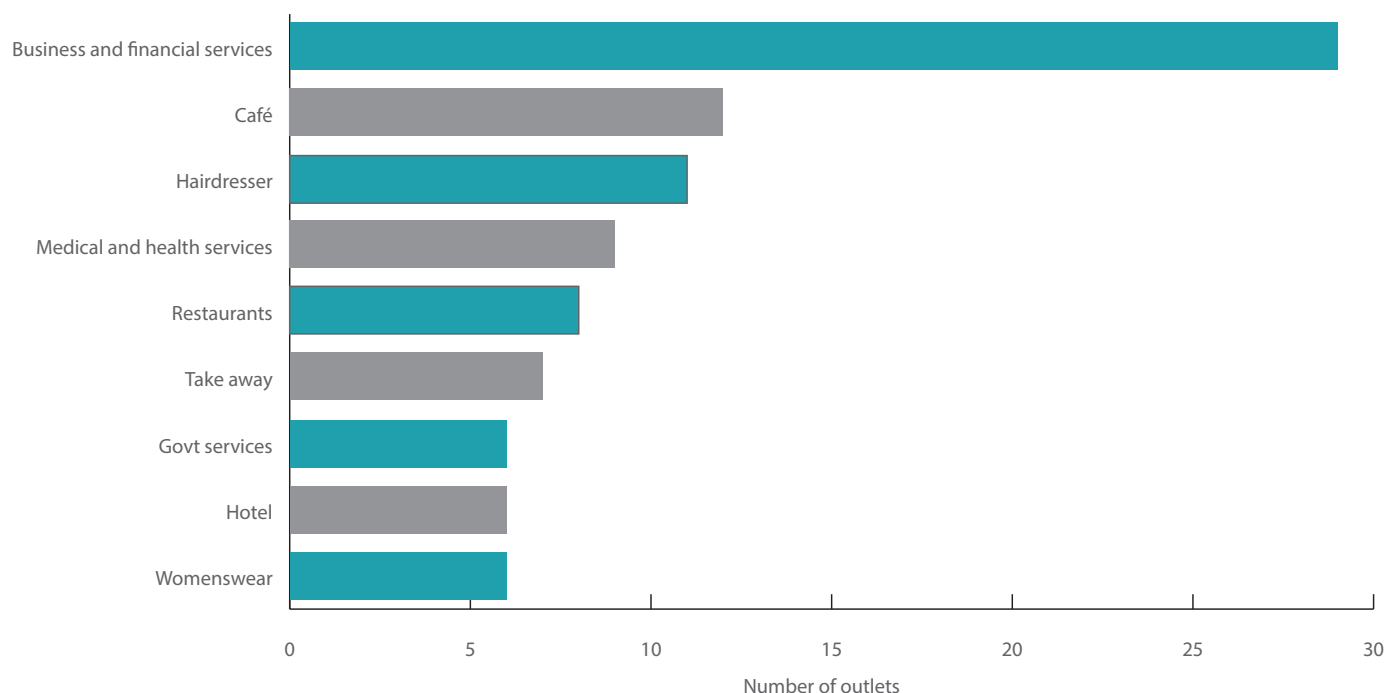
Table 2.0 Lithgow Main Street shop count 2008 - 2016

Year	Vacant shops
October 2008	38
September 2009	26
November 2010	22
June 2011	23
June 2014	12
June 2015	12
June 2016	20

4.4.4.4 Main Street precinct retail mix

An analysis of the current retail mix found within the study area has been undertaken. The majority of outlets (29) provided business and financial services. This was followed by cafes (12) and hairdressers (11). See Figure 8.0.

Figure 8.0 Lithgow retail precinct mix, 2016



Source: A.P. SHEERE CONSULTING 2016



5 Survey analysis and outcomes

A total of 214 persons completed the Lithgow Retail Shopper Survey 2016

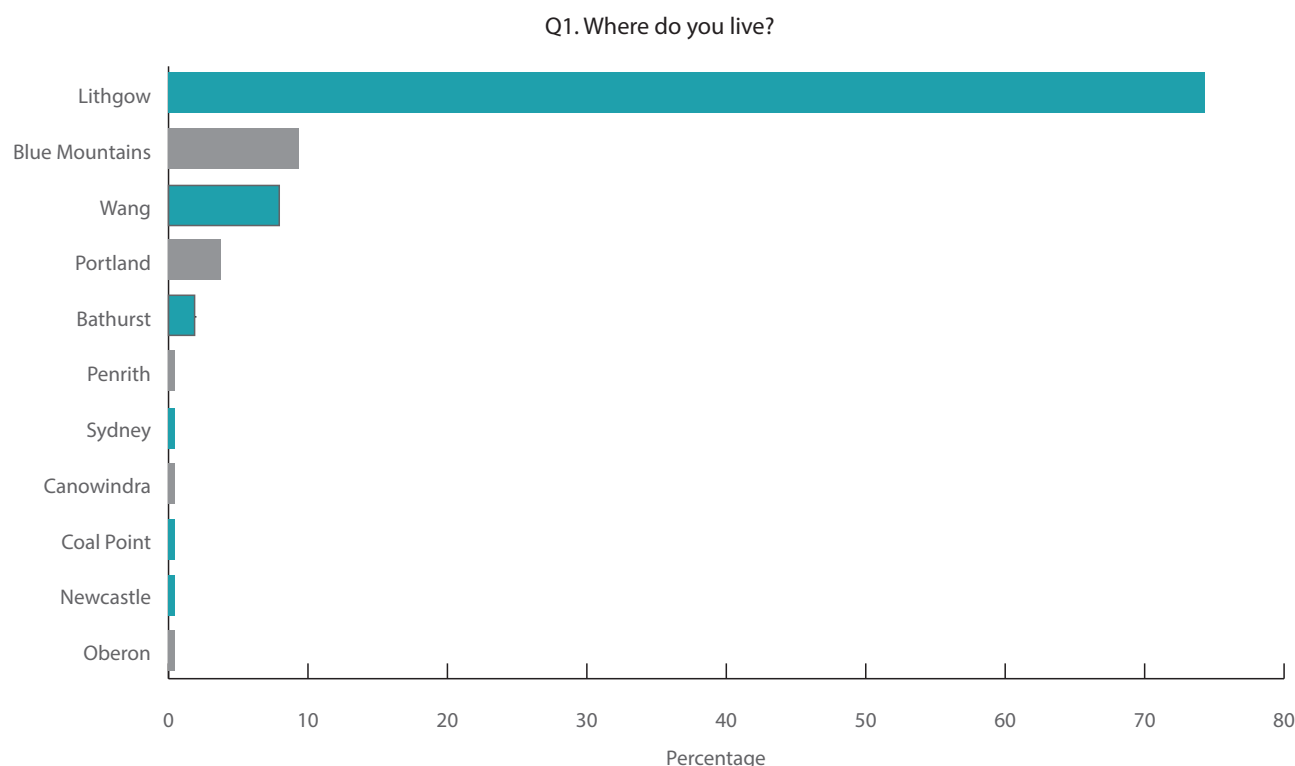
This survey was not demographically targeted but it was aimed at acquiring a representative selection of the current workforce and non-working persons. The face-to-face and online surveys were combined using the *survey monkey tool* to aide with the analysis of data. A total of 214 persons completed the Lithgow Retail Shopper Survey.

This section summarises the responses to the ten questions asked in the survey.

5.1 Survey respondents usual place of residence

Of the 214 people who completed the retail survey, approximately 74.3% resided within Lithgow (not including Wallerawang and Portland), followed by the Blue Mountains at 9.35%. In total, 184 or 86% of respondents usually resided in the Lithgow LGA. See Figure 9.0 for the survey residential status break down.

Figure 9.0 Survey respondent's place of usual residence

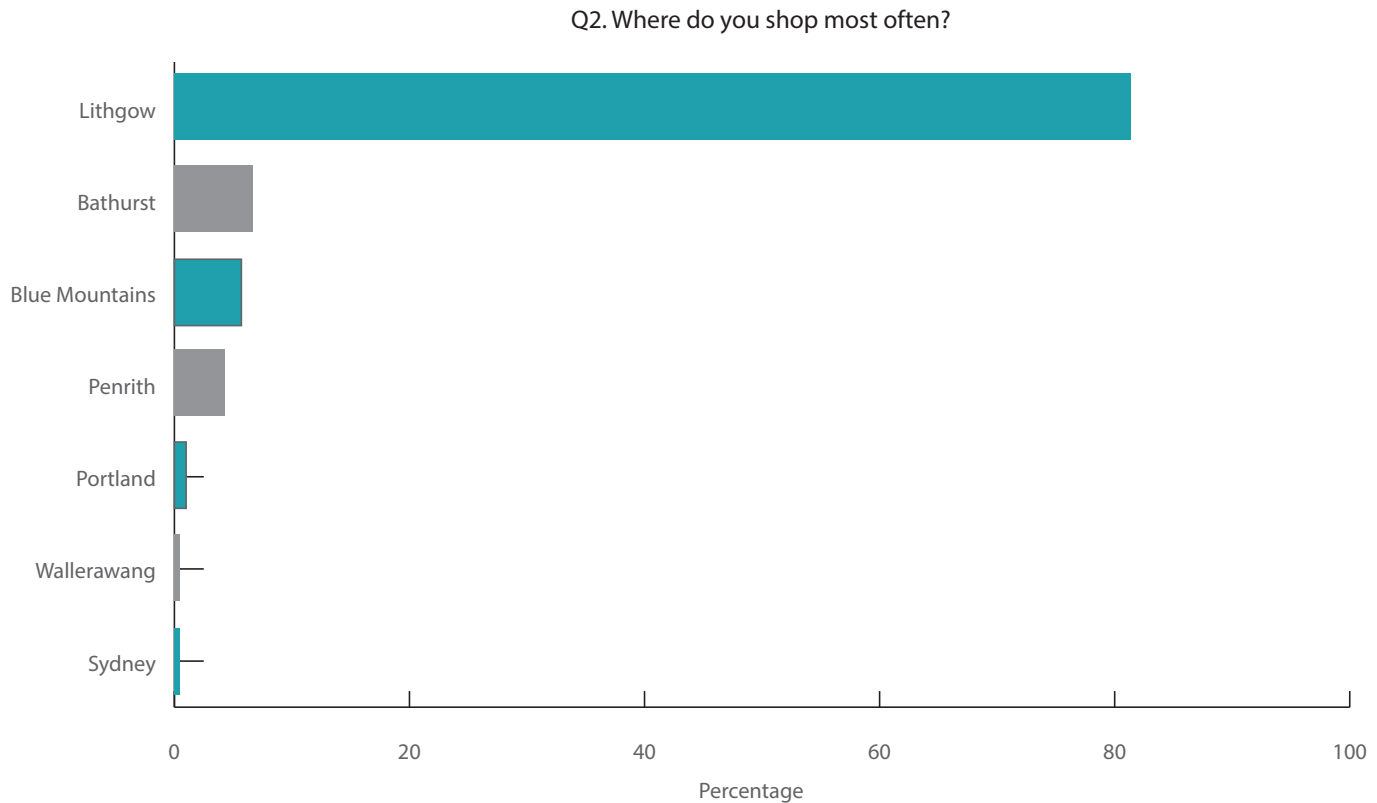


Source: A.P. SHEERE CONSULTING 2016

5.2 Respondents most frequent shopping location

Overwhelmingly the majority of respondents cited Lithgow as their most frequent shopping location at 81.43%. This was followed by Bathurst (6.67%) and the Blue Mountains (5.71%). See Figure 10.0 for a detailed break down.

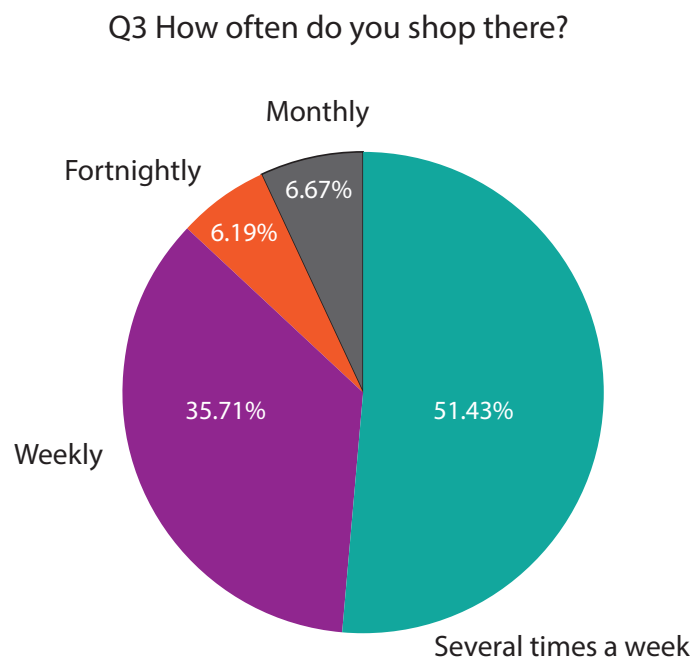
Figure 10.0 Most frequented shopping location



Source: A.P. SHEERE CONSULTING 2016

Most (51.43%) respondents said that they would shop 'several times a week' in these locations followed by 'weekly' at 35.71%. See Figure 11.0 for the breakdown.

Figure 11.0 Shopping frequency



Source: A.P. SHEERE CONSULTING 2016

5.2.1 Lithgow's retail draw

Further analysis was undertaken in order to identify Lithgow's retail draw. Results indicate that the majority of people using the local retail services reside in Lithgow itself.

Of the 184 Lithgow residents, 11.4% shopped outside the LGA the most - namely in Penrith and Bathurst.

30 survey respondents or 14%, resided outside the area with some making specific shopping trips to Lithgow. Of these 30 respondents, 47% cited Lithgow as their predominant shopping venue.

45% of respondents usually residing in the Blue Mountains were most likely to do the majority of their shopping in Lithgow.

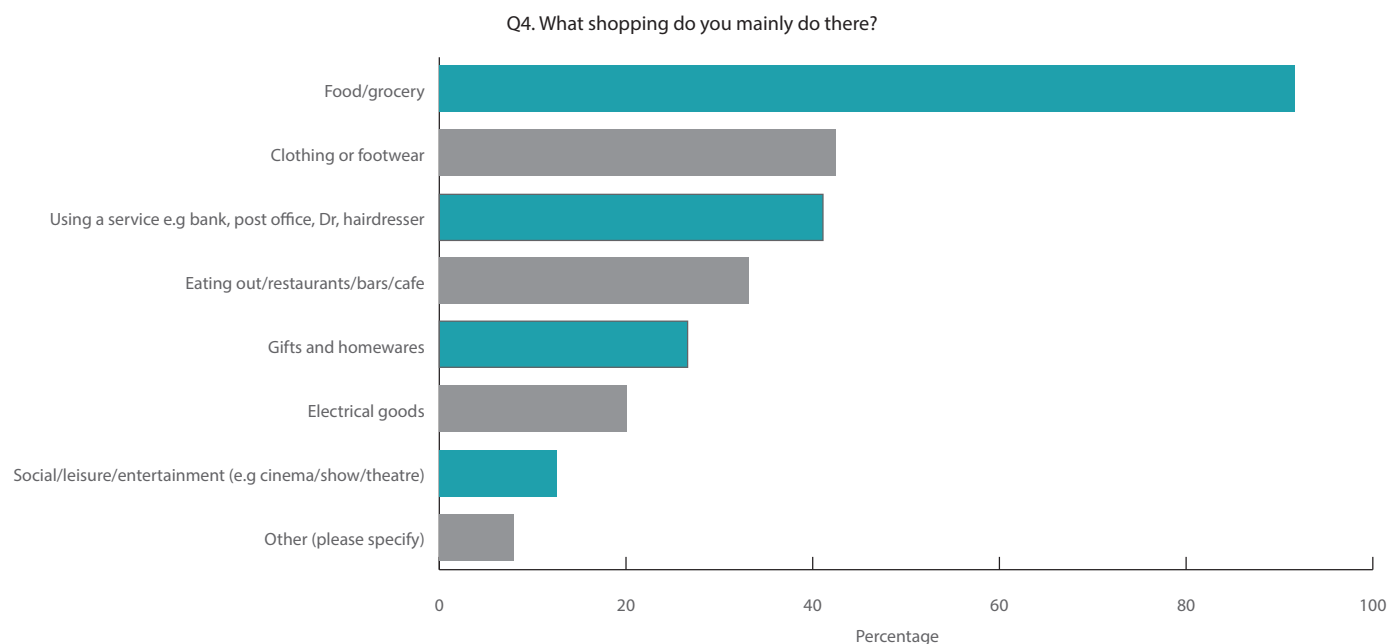
It should be noted that all respondents residing in Wallerawang selected Lithgow as their shopping destination of choice.

78% of Portland respondents cited Bathurst as their predominant shopping destination.

5.3 Shopping mainly undertaken by all respondents

Most shopping in general undertaken by respondents was for 'food/grocery' at 91.6% followed by 'clothing/footwear' (42.5%) and 'using a service' (41.1%). The breakdown is provided in Figure 12.0 below.

Figure 12.0 Shopping type



Source: A.P. SHEERE CONSULTING 2016

5.4 Non-resident shopping habits

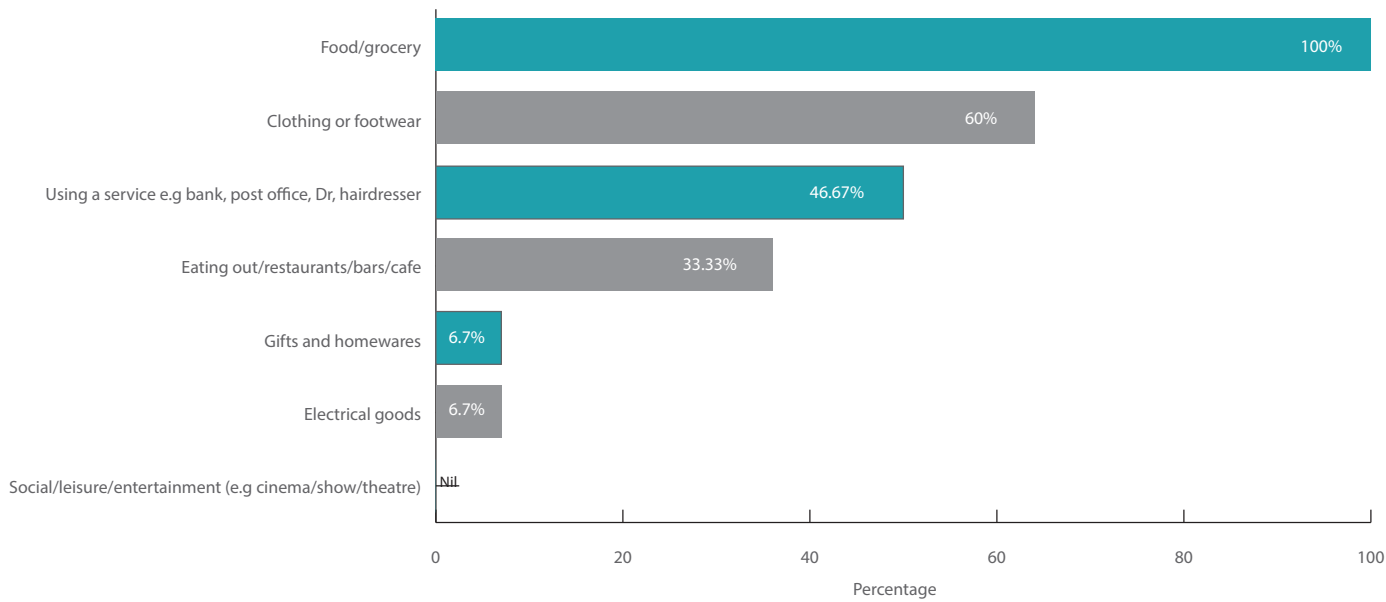
By analysing what non-residents said in terms of their predominant spending in Lithgow it is possible to see where this income is been invested.

All non-residents who selected Lithgow as the location where they shopped the most, cited Food/grocery shopping as their main retail activity in Lithgow. 64% also favoured Lithgow for Clothing and Footwear shopping followed by Gifts/homewares. See Figure 13.0.

The majority of these non-residents favouring Lithgow for shopping usually resided in the Blue Mountains - 64% of the total.

None of the out-of-town respondents cited Lithgow as a place where they came for Social/leisure activities.

Figure 13.0 What non-residents who shop mainly in Lithgow spend their money on



Source: A.P. SHEERE CONSULTING 2016



5.4.1 Estimated average spend of non-residents in Lithgow

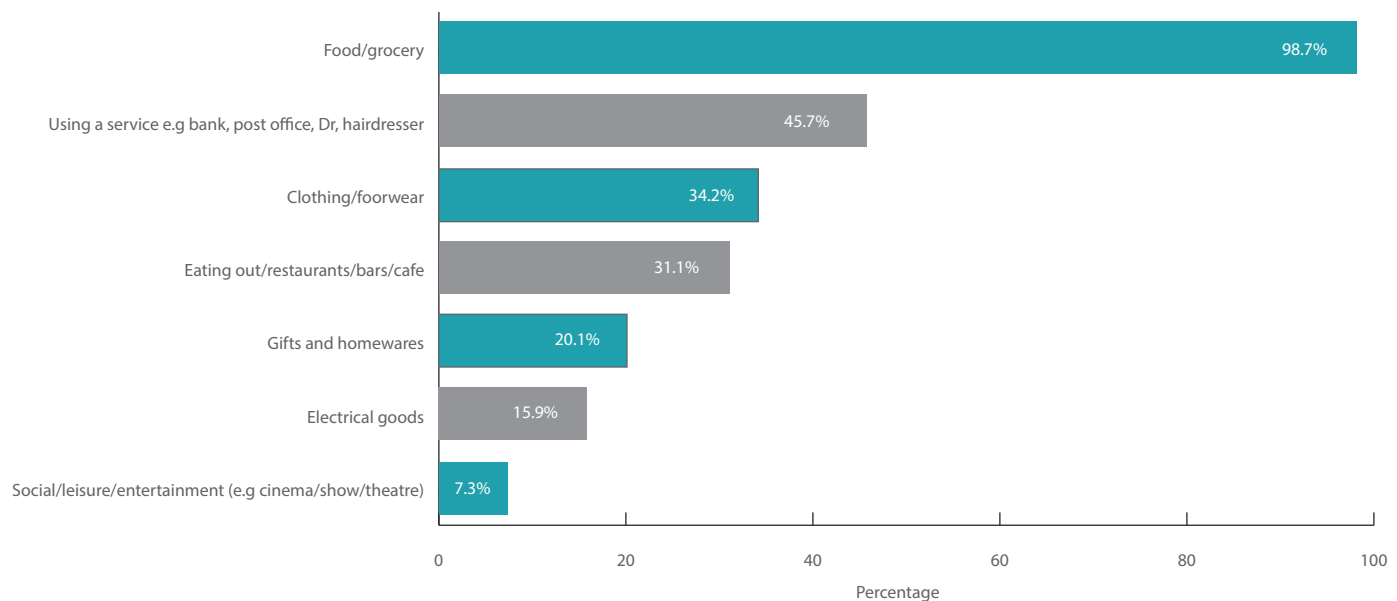
The average spend of non-residents who selected Lithgow as their principal shopping venue has been estimated at \$102.58 per shopping trip. This is based upon those who noted a figure. Taking this into consideration, 73% of those who responded, went shopping 'several times a week' adding to the retail spend locally.

5.5 Lithgow resident's shopping habits in Lithgow

By analysing what residents said in terms of their predominant spending in Lithgow it is possible to see where this income is been invested.

Almost all residents who selected Lithgow as the location where they shopped the most, cited Food/grocery shopping as their main retail activity in Lithgow. Approximately, 46% also favoured Lithgow for using 'services' followed by 'clothing/footwear' at 34%. 'Eating out/restaurants/bars/cafe' also ranked relatively highly amongst residents with 31% stating that they spent money with this activity. See Figure 14.0.

Figure 14.0 Principal expenditure of Lithgow residents in Lithgow



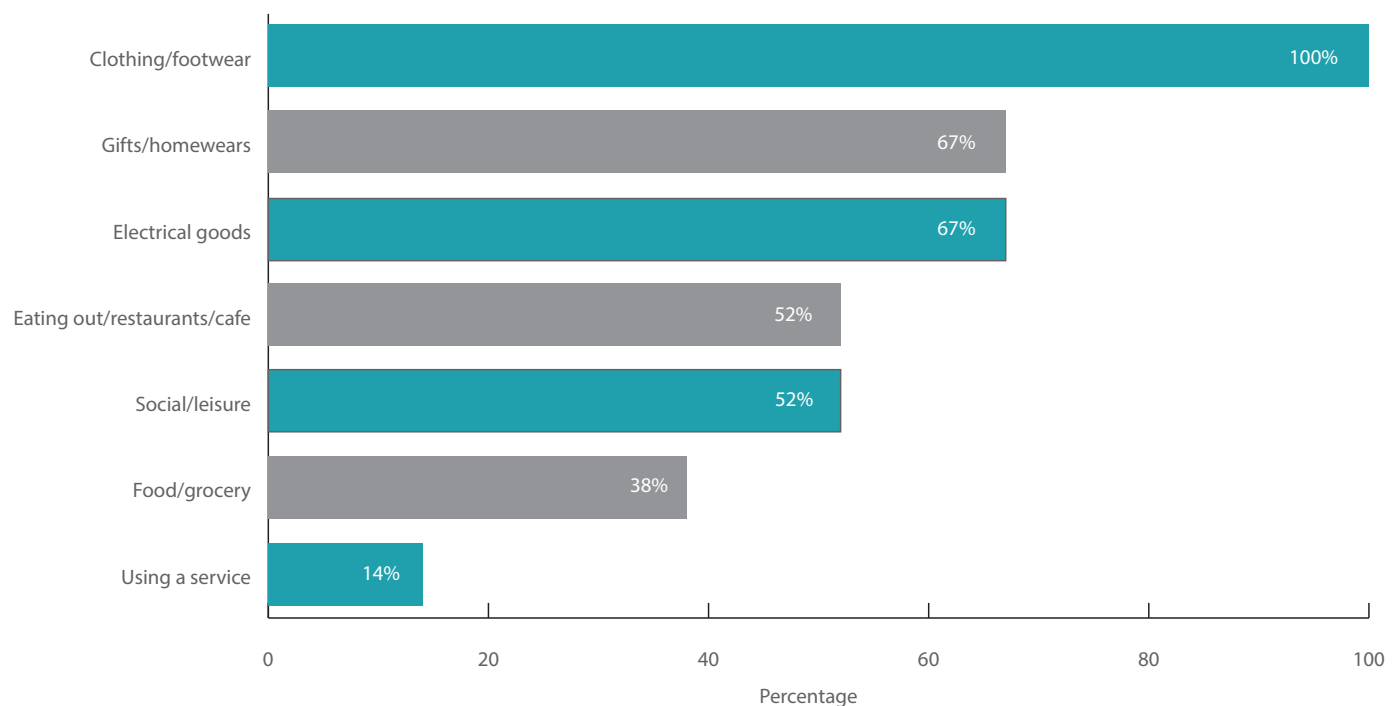
Source: A.P. SHEERE CONSULTING 2016

5.6 Lithgow resident's shopping predominantly outside the Lithgow LGA

By analysing what residents said in terms of their predominant spending outside the Lithgow LGA it is possible to see where this income is been invested or lost from the region. This is otherwise known as 'Retail leakage'.

All residents who indicated that they shopped outside the Lithgow LGA the most, cited 'Clothing/footwear' shopping as their main retail activity. Approximately, 67% also favoured other regions for purchasing 'Gifts and homewares' and 'Electrical Goods'. 'Eating out/restaurants/bars/cafe' and 'Social/leisure' also ranked relatively highly amongst these residents with 11% stating that they spent money with these activities. See Figure 15.0.

Figure 15.0 Principal expenditure of Lithgow residents who shop mainly outside Lithgow



Source: A.P. SHEERE CONSULTING 2016



5.6.1 Destinations of Lithgow residents who mainly shop outside the Lithgow LGA

Those Lithgow residents who said that they mostly shopped outside the Lithgow LGA mainly frequented Bathurst - 52%. This was closely followed by Penrith with 38% of these residents. See Table 2.1.

Table 2.1 Destination of Lithgow residents who mainly shopped outside Lithgow LGA

Favoured shopping locations	Percentage of these respondents
Bathurst	52%
Penrith	38%
Blue Mountains	5%
Sydney	5%

5.7 Estimated average spend of Lithgow residents in Lithgow

The average spend per trip of residents who chose Lithgow as their principal shopping venue has been estimated at \$166 per shopping trip. This is based upon those who accurately noted a figure. Taking this into consideration, the majority of these respondents (56%), went shopping 'several times a week' with a further 38% shopping weekly.

5.8 Estimated average spend of Lithgow residents outside of Lithgow

The average spend per trip of residents who predominantly shopped outside the Lithgow LGA has been estimated at \$308 per shopping trip. This is based upon those who accurately noted a figure. Taking this into consideration, the majority of these respondents (50%), went shopping every month with a further 25% making a weekly trip, adding to Lithgow's retail leakage.

5.9 Second shopping destination of choice

All respondents were asked where their second most frequented shopping destination was. Most respondents cited Bathurst at 31.3% followed by Lithgow at 20.2%. If Lithgow was not the primary destination it is likely that it would be the secondary destination if a number of respondents were working but not residing in Lithgow. See Table 2.2.

Table 2.2 Top 5 most popular secondary shopping destinations

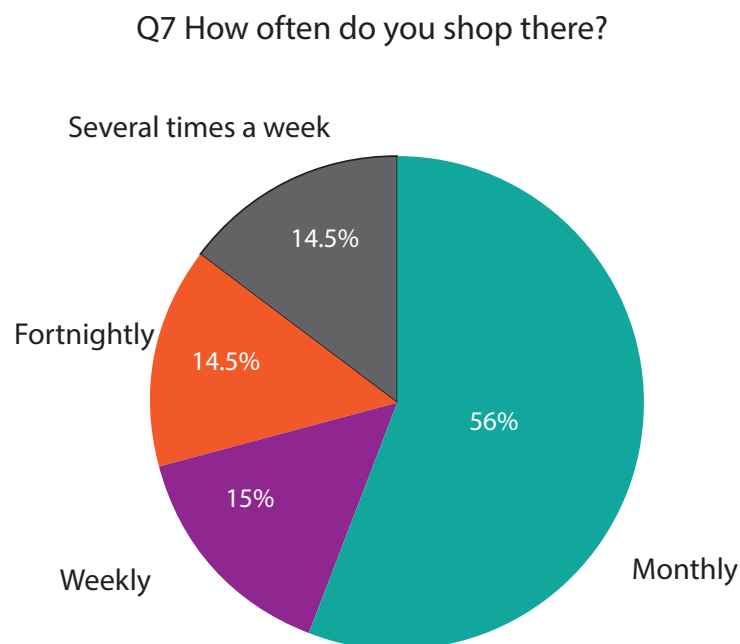
Secondary destinations	% of respondents
Bathurst	31.3%
Lithgow	20.2%
Penrith	17.7%
Blue Mountains	14.6%
Sydney	10.1%



5.9.1 Frequency of shopping at the secondary destination

Most (56%) respondents said that they would shop 'monthly' in these secondary retail locations followed by 'weekly' at 15%. See Figure 16.0 for the breakdown.

Figure 16.0 Secondary shopping frequency of all respondents



Source: A.P. SHEERE CONSULTING 2016

5.9.2 Secondary shopping habits of Lithgow residents

Lithgow residents' preferred choice for secondary shopping was Bathurst at 35.7% followed by Lithgow itself at 19.9%. These were respondents who chose to only shop in the Lithgow LGA.

Table 2.3 Lithgow residents' preferred secondary shopping destination

Secondary destination	% of Respondents
Bathurst	35.7
Lithgow	19.9
Penrith	19.9
Blue Mountains	12.3
Sydney	9.4
Wallerawang	1.8
Portland	1.2

Lithgow residents spent the most of this secondary revenue on social, leisure and entertaining activities. See Table 2.4.



Table 2.4 Lithgow resident's predominant secondary expenditure

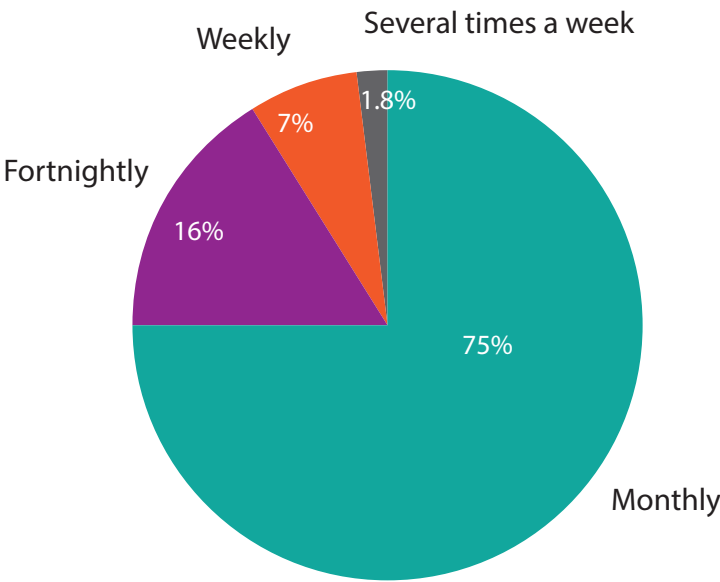
Lithgow resident's secondary activity	% of respondents
Social/leisure/entertainment (e.g cinema/show/theatre)	33.3
Eating out/restaurants/bars/cafes	32.3
Electrical goods	25.9
Using service: bank, post office, Dr, hairdresser	8.5

5.10 Estimated average secondary spend of Lithgow residents outside of the Lithgow LGA

The average spend per trip of residents who shopped outside the Lithgow LGA as a secondary shopping destination has been estimated at \$209 per shopping trip. This is based upon those who accurately noted a figure.

Taking this into consideration, the majority of these respondents (75%), went shopping every month with a further 16% making a fortnightly trip, adding to Lithgow's retail leakage. See Figure 17.0.

Figure 17.0 Secondary shopping frequency of Lithgow residents



Source: A.P. SHEERE CONSULTING 2016

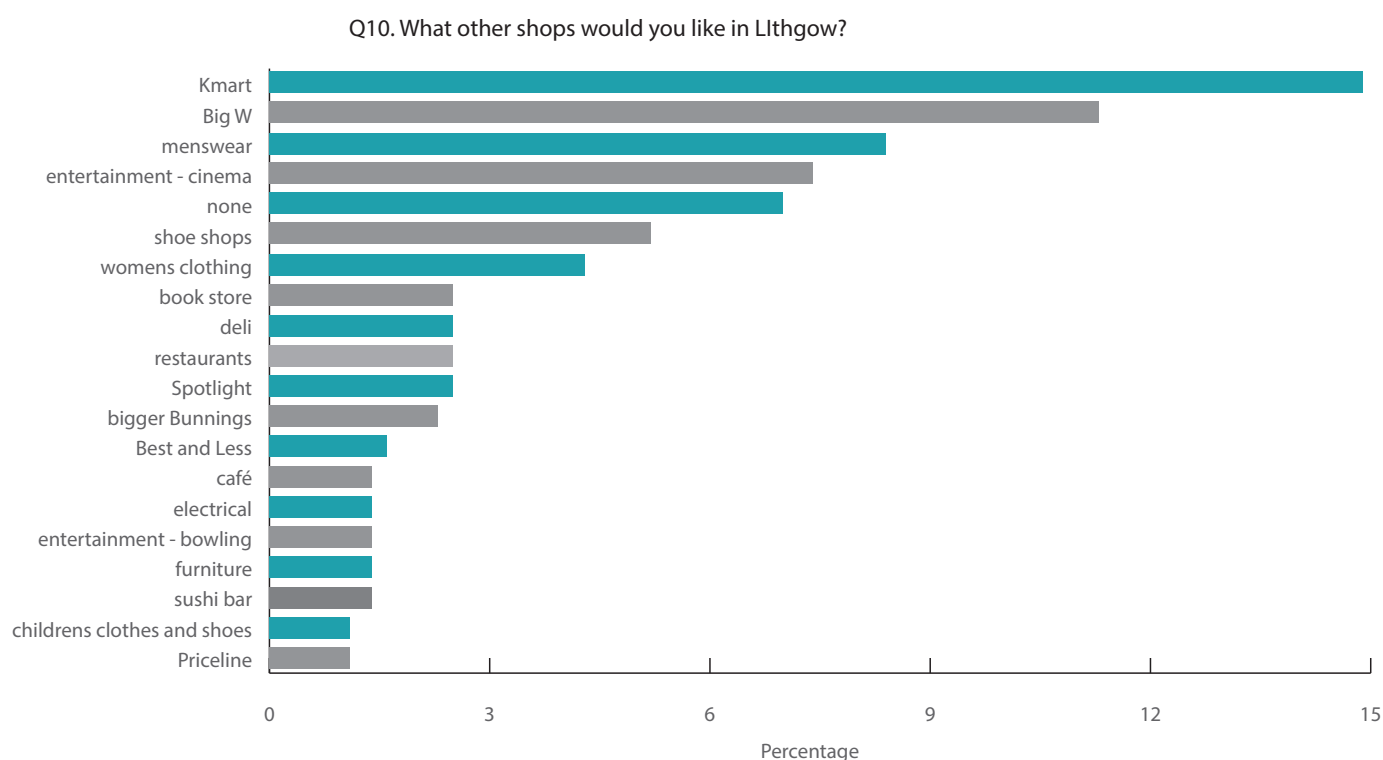
5.11 Shops that respondents would like to see in Lithgow

The majority of survey respondents cited either Big W or Kmart as 'shops they would like to see in Lithgow'. In total this amounted to 26.2% of all results. Table 2.5 provides a breakdown of the top 5 retail shop suggestions. There were a number who also thought that Lithgow did not need any more retail shops. At 7% of all respondents, this ranked fifth in the survey. A full breakdown is provided in Appendix ?? whilst the top 20 responses are illustrated in Figure 18.0.

Table 2.5 Top 5 suggested retail outlets for Lithgow

Q What other shops would you like to see in Lithgow	% of respondents
Kmart	14.9
Big W	11.3
menswear	8.4
entertainment - cinema	7.4
shoe shops	5.2

Figure 18.0 Top 20 responses regarding shops respondents wanted to see in Lithgow



Note. A number of respondents advised that they did not think that Lithgow needed any more shops and this has been included in Figure 18.0.

Source: A.P. SHEERE CONSULTING 2016



6 Gaps in retail supply

Lithgow residents who mainly shopped outside the Lithgow LGA cited 'clothing/footwear' as their main retail activity.

This section covers the Identification of potential gaps in retail supply/offerings within the Lithgow retail centres.

6.1 Lithgow residents shopping away from Lithgow

Lithgow residents who mainly shopped outside the Lithgow LGA cited 'clothing/footwear' as their main retail activity, followed by 'gifts/homewares' and 'electrical goods'. 'Eating out/restaurants/social/leisure' also featured highly.

These activities suggest that when these trips are made they are potentially thought of as 'days out' which would incur a greater spend per trip. These primary spending shopping excursions incurred an estimated average spend of \$308 per trip compared to \$166 by residents' who primarily shopped in Lithgow. These residents mainly traveled to Bathurst and Penrith.

Most secondary spending by all respondents was undertaken in Bathurst and then Lithgow on a monthly basis followed by weekly. Most Lithgow resident's secondary expenditure was on 'social/leisure/entertainment' activities closely followed by 'eating out/restaurants/bars/cafes'. The average spend per shopping excursion for Lithgow residents was \$209.

Most secondary spending by all respondents was undertaken in Bathurst and then Lithgow on a monthly basis followed by fortnightly.

This analysis suggests potential gaps in the provision of:

- Clothing
- Footwear
- Gifts/homewares
- Electrical goods
- Eating out/restaurants/social/leisure

6.2 Non-residents primarily shopping in Lithgow

All non-residents who selected Lithgow as their primary shopping destination cited 'food/grocery' as their primary retail activity followed by clothing/footwear.

None of these respondents cited social/leisure/entertainment activities as part of their expenditure in Lithgow.

Most of the non-residents came from the Blue Mountains and it is likely that many of these were workers who commute to Lithgow on a daily basis.



6.3 All respondents retail suggestions

Kmart and Big W

Most respondents thought that Lithgow would benefit from either a Kmart or Big W store. This was followed by menswear, a cinema and more shoe shops.

Big W and Kmart make investment decisions based on a number of requirements such as forecast population growth, competition, etc. These requirements are usually managed by the Property division of the business who would seek potential opportunities for new outlets as part of any expansion programme.

Consultations made with Kmart as part of this project indicate that a request can be sent to their property division to consider the region as a potential site location. However, Kmart did emphasise that they received such requests on a daily basis and ultimately decisions would be based on the commercial viability of such a development.

Currently, the closest Kmart to Lithgow is located in Penrith or Orange. The closest BigW is in Katoomba or Bathurst which are only 35-40 minutes drives away.

There is a facebook petition called '*Lithgow needs a Kmart*' which commenced in August 2013. The petition has had 509 signatures to date. There does seem to be significant community support for these retailers however, as stated earlier, investment decisions are based on a number of factors and not just the popularity of the brand amongst the community.

In addition to this, if such a large retailer like Kmart did establish on the outskirts of the Lithgow CBD, this could have a negative impact on the current independent retailers in Lithgow's Main Street. It is possible that these retailers would lose some of their regular shoppers and visitors who would instead frequent the Kmart store.

Cinemas

Large multi-screen cinema groups normally require a minimum population and base their establishment on a number of investment and economic requirements. In recent years cinemas have been closing for a number of reasons including a change in viewing/social habits effecting patronage, the comparative cost of going to the Cinema.

Currently there are multi-screen cinemas in Katoomba (35 minutes away) and Bathurst (40 minutes away).

A community cinema is operating in Lithgow's Main Street. This appears to be well patronised however, the films shown (e.g *Sense & Sensibility*, *The African Queen* and *Lachlan Macquarie*) seem to target a particular demographic and not the younger residents or families. Most people who mentioned the need for a cinema related this to activities for children



and young people. Therefore, the Lithgow community cinema does not necessarily address this need.

The Crystal Theatre in Portland recently recommenced showing films after acquiring new digital equipment. This cinema seems to show more films that would be of interest to families and young people (e.g Frozen, Wolverine, Thor, Despicable me2). However, seating arrangements (hard plastic chairs) could be an issue here. This could be addressed to make the viewing more comfortable and potentially more popular.

A similar scenario could be established in Lithgow. A suggestion was made that the currently vacant Lithgow Theatre Royal could be opened (after renovations) again as a cinema in Lithgow. It is on Main Street albeit at the far end but a well known building in the Lithgow area.

The Council managed, Union Theatre on Bridge Street could also be a potential location to show movies. Further investigation for both scenarios would be required.

Figure 19 Portland Crystal Theatre



Source: Facebook-Pictures At Portland, Portland Film Society Inc, 2016

Figure 20 Theatre Royal, Main Street Lithgow



Source: LJ Hooker, Lithgow

6.4 Potential retail/service opportunities

Analysis of the survey data from Question 10 where respondents were asked what shops they would like to see in Lithgow and identifying which products/services were usually purchased by residents outside the Lithgow area, suggests that opportunities may exist for the establishment of the following additional stores/services in Lithgow:

- Menswear and womens wear
- Eateries, recreational activities, social/leisure facilities e.g cinema
- Shoe shops
- Womens clothing
- Book store
- Gifts/homewares
- Electrical goods

Note. This list does not include the most popular suggestions of a Kmart and BigW.

An assessment has been undertaken to identify supporting evidence for the potential reasons behind these seven suggestions. Table 2.6 illustrates the types and number of stores currently available in Lithgow's retail precinct to see if gaps do potentially exist. The Lithgow Plaza outlets have also been included in this assessment as this does form part of the overall retail offering in Lithgow.

Table 2.6 Estimated count of retail offerings as at June 2016

Shop/service	Number of outlets in retail precinct	Number of outlets in Lithgow Plaza	Estimated total	Issues identified?
Shops selling menswear (not sportswear)	2	3	5	Limited choice
Shops selling womenswear	6	5	11	Potential issues with stock levels
Restaurants and cafes	8 restaurants 12 Cafes	7	27	Perception that restaurants are not destination eateries.
Social/leisure facilities e.g cinema	1 community cinema 1 active theatre 1 indoor swimming pool 6 hotels Lithgow RSL and bowling club Lithgow Workies	nil	11	Community cinema tends to target older residents. General perception of there being 'nothing to do' in Lithgow
Shops selling shoes	Kiddingabout sells childrens shoes and Rockstar sells womens shoes	2	4	Limited selection in Target and stock sizes
Shops selling books	1	1	2	Limited selection in Target
Shops selling gifts/homewares	At least 16 outlets stock gifts/homewares	7	23	-
Large electrical goods	1	0	1	-

It should be noted that a sizable number of respondents did not think that Lithgow needed any more stores

A full, current, list of shops in Lithgow Plaza can be found in Appendix C

- Table 2.6 illustrates that there are two menswear stores not including Target or Dimmeys.
- There are four shoe shops including a couple of the smaller boutique stores.
- There are 23 stores selling gifts/homewares and one store selling larger electrical goods (bulky goods).
- There are 27 cafes and restaurants, 6 Hotels, one active theatre and one community cinema.

The assessment indicates that the greatest opportunities potentially lie within the following sectors:

- Menswear
- Shoe shops
- Large electrical retailers

Social/leisure facilities

In addition to this, there appears to be a general perception that there ‘*is nothing to do in Lithgow*’ with limited in particular for younger people and children. The lack of a multi-screen cinema and bowling alley seem to be at the root of this perception for families.

The establishment of a multi-screen cinema might not be viable however, a venue showing new releases may be possible using one of the theatres in Lithgow although further investigation would be required.

The development of the outdoor adventure playground in Lithgow by Council should also help to address this perception of ‘nothing to do’ for youngsters. The benefits of this initiative is the accessibility provided by the adventure playground being open to all ages at no charge.

Indoor play centre

There is a small indoor play centre in the Lithgow Workmen’s Club which requires membership by residents living within a 13km radius of the club. A large indoor play centre for children in the Lithgow LGA like Flip-out or Kids’ Kingdom in Katoomba could be a popular attraction especially with the region’s inclement weather during winter. This could also appeal to families outside the Lithgow LGA if a point of difference is made to other competitive centres. The closest large indoor play centres are currently located in Katoomba (35 minutes drive away) and in Bathurst (40 minutes drive away).

Antique stores

Antique stores are particular popular with tourists and visitors. Lithgow seems to lacking in these stores with only one identified in Main Street.

Discount outlet stores

Lithgow could be a suitable location for discount outlet/seconds stores.

There is a discount Rivers store in Katoomba and Bathurst but the next nearest location to access a number of these outlets would be Penrith or Sydney.

6.5 Potential target market opportunities

Many respondents resided in the Blue Mountains and worked in Lithgow. This sector also cited Lithgow as their primary retail shopping destination. None of these shoppers identified Lithgow as a place where they would go for social activities or entertainment.

This provides a significant opportunity for this market to be consistently targeted through advertising of events, retail offerings and infrastructure upgrades, etc.

By encouraging further visitation, the patronage of the retail shops is also increased. Many of the shop owners identified visitors and non-resident workers as being important to their revenue. Having regular customers with disposable income was important to the viability of many of these shop owners.

With the employment threat to those working in the local energy sectors a constant issue and therefore the potential reduction in spending levels from this sector, the continued and increased expenditure from non-residents becomes more important.

There is an indication that this non-resident target market is unaware of the activities/events being hosted in Lithgow for example, and of the leisure/social activities and providers established there.

Anecdotal evidence also suggest that this is true with some people being seemingly unaware of the upgraded parks, indoor heated pool, boutique shops and the existence of well known brands such as Rockmans, Crossroads, Williams Shoes, Reject Store, Sanity, and the recently opened Prouds Jewellers.



7 Addressing the gaps in retail

The Main Street precinct is about to be significantly upgraded which is likely to boost its appeal as a shopping destination.

7.1 Lithgow's retail catchment

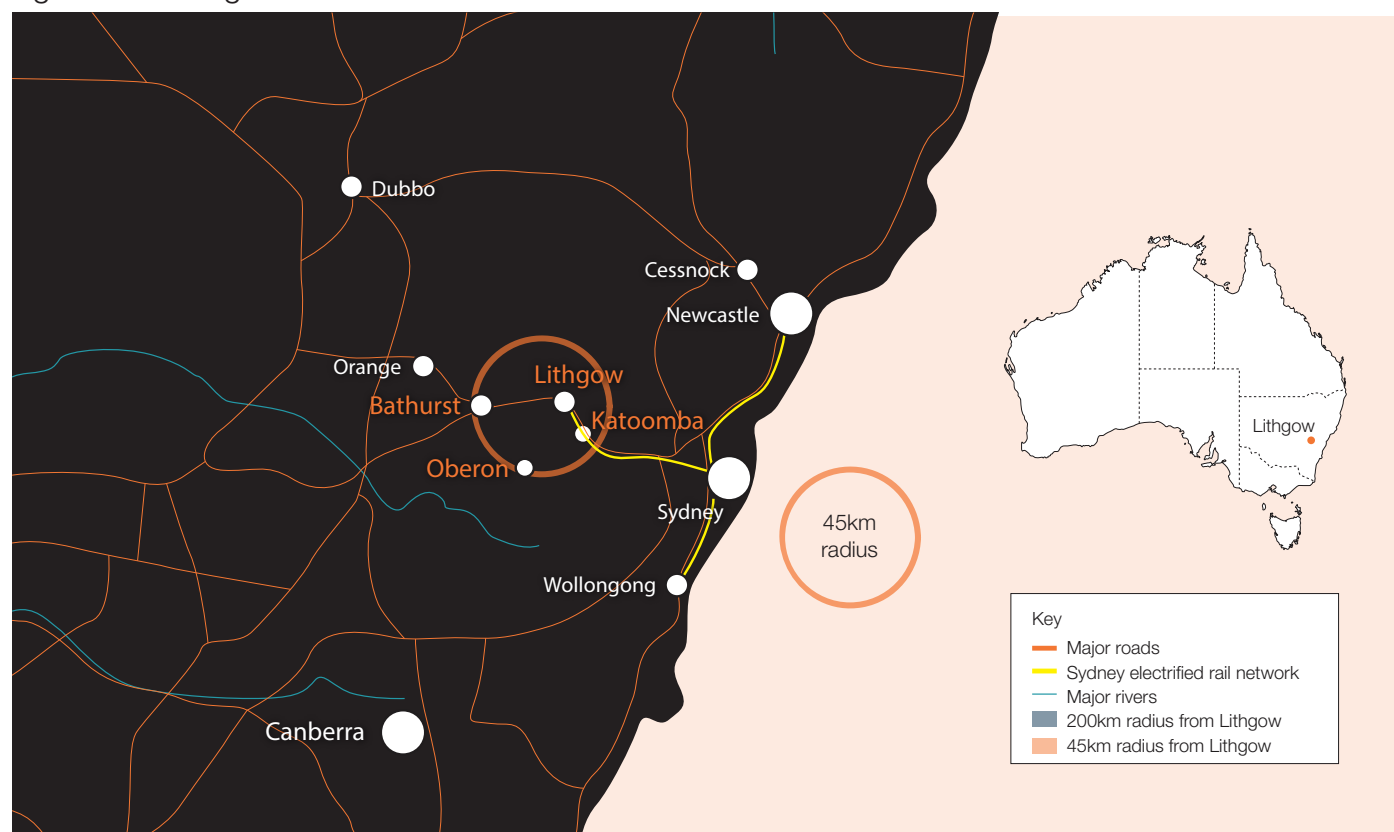
Lithgow has a number of specialty stores, cafés, modern facilities and convenient services which improve the attractiveness of the region to shoppers. Tourist numbers are increasing as people become more aware of the attractions and activities available in the region.

Lithgow also offers the convenience of a predominantly level walking retail strip (unlike Katoomba) which attracts those with young families, retirees and people who use mobility aids.

The Lithgow Main Street precinct is about to be significantly upgraded to improve access and the general appearance of the area which is likely to boost its appeal as a shopping destination.

All these factors influence the scope of the region's retail catchment. If a radius of 45km is taken from the Lithgow CBD it is possible to identify a potential retail catchment of approximately 148,000 persons. See Figure 19.0.

Figure 19.0 Lithgow's retail catchment



Source: Lithgow Economic Development Strategy 2015

7.2 Initiatives to address the identified retail gaps

Resources are needed to develop and implement an effective marketing plan and associated activities targeted towards both the resident population and those residents and businesses located in neighbouring LGAs and further afield. Such promotion should be undertaken on a regular basis and as such, ongoing and sufficient resourcing is required. Various specific initiatives have been detailed in Table 2.7 below. These should be read in conjunction with Section 7.3.

Table 2.7 Suggested initiatives to address retail gaps and opportunities

Number	Actions	Stakeholders/Resources	Performance indicator	Priority 1-3 (1 = the highest)
1.0 Promote to targeted markets				
1.1	Develop and implement an integrated and effective marketing plan for both residents and those residing in the Blue Mountains to communicate what shops, facilities and services are available in the LGA and potential opportunities	LCC, local businesses	Marketing plan developed; actions implemented and sourced appropriately	1
1.2	Regularly submit press releases for publication in the local newspapers, Blue Mountains Gazette and publications in Bathurst, Oberon (as appropriate) regarding local infrastructure developments.	LCC	Monthly press releases published	2
1.3	Investigate use of eye catching LED advertising boards strategically positioned in and around Lithgow for advertising events, etc.	LCC	Costs acquired, implementation plan developed, permits requested, advertising boards installed and managed	3
1.4	Develop marketing literature to promote Lithgow retail precinct as a place for new businesses. Promote through the Blue Mountains (e.g Blue Mountains Gazette, local schools), Western Sydney and metropolitan Sydney.	LCC, local businesses, local realtors and other government agencies	Appropriate advertising developed and published/ distributed. Ongoing resourcing allocated.	2
2.0 Local business and community support				
2.1	Undertake a series of interviews with Main Street retailers and place on Facebook and Council's website.	LCC, local businesses	Plan developed, businesses engages, interviews published	1
2.2	Investigate the use of Facebook by shop owners as an effective marketing tool.	LCC, local businesses	Ask for business owners who currently do this to share their experiences. Organise workshops/ guides if applicable	1
2.3	Undertake shop local campaigns which are ongoing and heavily promoted with a clear explanation as to why this is important.	LCC, local businesses, local community	Shop local campaign plan developed and implemented. Appropriate resourcing allocated.	1
2.4	Encourage good customer service	LCC, local businesses	Develop training literature	2
3.0 Other initiatives				
3.1	Investigate the feasibility of whether the Theatre Royal or Union Theatre could be used to show films.	LCC, local community	Feasibility study undertaken and recommendations pursued.	3



7.3 Ongoing Council supporting initiatives

There are a number of Council strategies which will directly impact the retail sector. These have been summarised below. Many of the strategies are currently being implemented and are anticipated to have a positive effect on the retail sector in terms of trade volume and overall shopper experience in Lithgow.

Lithgow Business and Retail Strategy 2010

- Action L1 Improve signage at the entry of town by erecting signage directing drivers to Main Street. Current signage directs residents to Lithgow Valley Plaza. *Status - new signage installed.*
- Action L2 Provide cycle parking within Lithgow town centre. *Status - incomplete/ongoing*
- Action L3 Improve connections between Main Street and Shopping centres, and between shopping centres, through signage, widened footpaths and shade trees. Council should negotiate with landowners to improve pedestrian connections to shopping centres on privately owned land. *Status - incomplete/ongoing*
- Action L4 Complete traffic modelling for the alternative ways of making the Main Street one way to allow for additional parking. Over the longer term the alternative uses could be developed on Council's existing public car park, to offset any costs associated with changes to traffic flows. *Status - incomplete but part of the revitalisation project*
- Action L5 Consider rezoning business areas to appropriate alternative uses. *Status - LEP 2014 rezoned the commercial land along Main St from Lithgow St to GWH and along Railway Parade to B4 Mixed Use.*
- Action L6 Adopt design guidelines for the conversion of old shop fronts for alternative uses. This can be incorporated within a development control plan, supporting the principal LEP. *Status - Development Control Plan (DCP) is being prepared. Consideration to addressing redevelopment of Main Street properties can be given particularly in relation to Disability Access. The DCP will also address the implementation of the Street Activation Clause of the LEP and encourage future character changes through various landuse clusters in the separate parts/blocks of Main Street.*

Lithgow Destination Management Plan 2013

The Lithgow Destination Management Plan provides Lithgow City Council, government agencies, tourism organizations, the tourism industry and associated businesses, with a comprehensive framework to guide the development of tourism within the Lithgow LGA.

Some of the key actions detailed in the Destination Management Plan which are also listed in the Lithgow Economic Development Strategy 2015 and are provided below.

Table 2.8 Extracts taken from the Lithgow Destination Management Plan

Number	Actions	Stakeholders/Resources	Performance indicator	Priority 1-3 (1 = the highest)
A1.2.11	Develop and implement an integrated and effective marketing and branding strategy for tourism that also aligns with Council and Economic Development.	LCC, TAC	Marketing and branding strategy developed.	1
A1.2.12	Promote the Lithgow Tourism Strategy to the Council, community, government agencies and other stakeholders. Include an official launch for the strategy.	LCC, TAC, local businesses, Department of Industry, other government agencies, local media	Official launch of strategy.	2
A1.2.13	Using signage and public art, establishing eye-catching and memorable gateway entry arrival points.	LCC, TAC, Roads & Maritime Services (RMS), TAC	Plan developed and implemented.	1
A1.2.14	Continue to improve the presentation of the Great Western Highway corridor through town, in particular the section from just west of Lockyer Street through to the intersection with Main Street.	LCC, Roads & Maritime Services (RMS), TAC	Presentation improved as funds become available.	2
A1.2.15	Implement the recommendations of the Retail Strategy, Cultural Plan and Cultural Precinct Study in particular those relating to place-making, improvements to the cultural attractions, and preservation and promotion of the heritage streetscapes.	LCC	Various improvements made to key areas.	1
A1.2.16	Enhance streetscaping along Main Street and encourage Main Street businesses and property owners to improve the presentation of their buildings and window displays and where possible undertake on-street trading.	LCC, main street traders, property owners	Uptake of the Façade Improvement Program; promote on-street trading.	1
A1.2.17	Encourage the Pub Hotels to activate their street frontage e.g development of side walk cafes.	LCC	Promote side-walk cafes with appropriate literature.	2
A1.2.18	Incorporate heritage precincts and streetscapes into the product base of the area.	Tourism Unit	Identify precincts.	2
A1.2.19	Encourage all property owners / businesses in the Main Street to upgrade and maintain their building facades.	LCC	See A1.2.15	1
A1.2.20	Undertake a skills audit and gap analysis proposed for the Tourism sector.	LCC	Skills audit and gap analysis undertaken including workshop with members of Tourism Lithgow.	1
A1.2.21	Identify potential sites for Recreational Vehicals (RVs) to encourage visitation in Lithgow, Portland and Wallerawang.	LCC, Caravan and Camping Industry Association	Suitable sites identified, established and promoted.	1

Lithgow CBD Revitalisation Action Plan 2015

In February 2014, Lithgow Council commissioned a multidisciplinary team to develop strategies for revitalisation of the Lithgow CBD. Council's brief identified the following objectives for the Lithgow CBD Revitalisation Action Plan:

- Improving accessibility and car parking
- Enhancing streetscape character
- Upgrading and providing additional public amenities
- Activating public domain space and vacant buildings
- Embracing community driven place making
- Increasing community safety
- Developing collective marketing and branding









8.0 Action Plan

8.4 Quick Wins

Quick wins are actions that can achieve significant outcomes and results in realising Revitalisation Action Plan recommendations but are highly achievable in terms of cost, on site constraints, and timing.

Quick win summary

Action	Who	Timeframe	Cost	
1. Expand Council Façade Restoration Program and target key streetscape buildings	Lithgow City Council in partnership with landowners and business operators	Ongoing	\$40,000 per year with matching contributions by landowners	 
2. Activate public spaces with events, markets and street entertainment	Lithgow City Council and community and event organisations	Ongoing	Annual Council budget allocation in combination with other stakeholder budgets	 
3. Trial several pop up street dining pods within road reserve	Lithgow City Council and pioneer business partners	12 months	Seed funding of \$50,000	 

Action	Who	Timeframe	Cost		
5. Activate dormant public spaces such as Pioneer Park with new interim uses such as urban food gardens, public art venues etc	Lithgow City Council, Lithgow Creatives, business organisations and sponsors, schools and the general community	12 months	Seed funding of \$25,000		
6. Activate dormant shopfronts with pop up shops	Lithgow City Council, business organisations, landowners, real estate agents, and emerging entrepreneurs	12 months	Seed funding of \$5,000		
7. Deliver business support programs including customer service and visual merchandising training to maximise shop window street appeal and return custom	Lithgow City Council, business organisations, and sponsors	Ongoing	\$20,000 per year		
8. Encourage landowners and business operators to install street pots with flowers and	Business organisations and individual traders	12 months	No cost to Council		

Lithgow Economic Development Strategy 2015

The Economic Development Strategy reflects Council's ongoing commitment to addressing the needs of local businesses and residents, diversifying the local economic base, attracting new investment and delivering increased economic and social benefits to the community.

Table 2.9 Extracts taken from the Lithgow Economic Development Strategy 2015

Number	Actions	Stakeholders/ Resources	Performance indicator	Priority 1-3 (1 = the highest)
A1.6.4 RETAIL: GENERAL ACTIONS				
A1.6.4.1	Coordinate joint marketing to support businesses which extend their trading hours, particularly cafes in the evening and on Sunday.	LCC, local businesses	Marketing program developed; agreed sponsorship provided.	1
A1.6.4.2	Develop branding for local products and locally owned businesses and incorporate with 'shop local' campaigns.	LCC	Branding developed, promotion of brand use by businesses.	1
A1.6.4.3	Encourage local restaurants and cafes to showcase local products. Consider opportunities to promote concepts such as slow foods.	LCC, local businesses	Number of businesses showcasing local products.	1
A1.6.4.4	Ensure that council events are appropriately advertised both locally and regionally to maximise benefits to retailers.	LCC, media outlets	Number and distribution of adverts.	1
A1.6.4.5	Explore feasibility of establishing a 'pop up shop program' to encourage local entrepreneurship and promote temporary uses for vacant shops.	LCC	A paper is produced exploring the feasibility of introducing a pop up shop program within Lithgow.	2
A1.6.4.6	Disseminate information on available grants and funding sources through Council's website, facebook, BEC etc.	LCC, BEC	Funding information is provided on council's website and Facebook.	2
A1.7 SMALL BUSINESSES AND ENTREPRENEURSHIP				
A1.7.1	Encourage home based business development initially by investigating demand for a Home Based Business Network.	LCC, local businesses, Dept Industry	Database developed.	2
A1.7.2	Develop marketing literature that specifically targets potential home based business entrepreneurs and small businesses which actively encourages their establishment.	LCC	Marketing literature developed for distribution.	1
A1.7.3	Source reputable and inspiring entrepreneur speakers/trainers who can present to the community including school children.	LCC, UWSCollege, local businesses, govt agencies, etc	Keynote speakers presenting at least twice a year.	1
A1.7.4	In partnership with UWSCollege, TAFE, etc, continue to organise appropriate business training programs to encourage and foster growth - setting up your own small business' program.	LCC, UWSCollege, TAFE, BEC, Dept Industry, RDACW	Four workshops/training programs per year.	1
A1.7.5	Develop entrepreneurship programs to encourage and assist residents to establish their business.	LCC, UWSCollege, TAFE, BEC, Dept Industry, RDACW	Programs developed.	1
A1.7.6	Identify those businesses which have illustrated the ability to diversify their product offerings and showcase them to encourage other businesses to explore potential opportunities.	LCC, Dept Industry, RDACW, local businesses, BEC	Database created and program developed to showcase.	1
A1.7.7	Identify industry champions and identify local skills to convert them into local businesses.	LCC, UWSCollege, TAFE, BEC, Dept Industry, RDACW	Champions identified and program developed to promote local skills.	1

Number	Actions	Stakeholders/Resources	Performance indicator	Priority 1-3 (1 = the highest)
A1.2 TOURISM AND RECREATION				
A1.2.1	Improve the promotion of Lithgow and surrounds, by developing reciprocal arrangements with other tourist information offices.	LCC, Oberon Tourism, Blue Mountains Tourism, Bathurst Tourism, Orange Tourism, Penrith Tourism, City of Sydney Tourism	Reciprocal arrangements finalised.	2
A1.2.2	Prepare a business case for tourist accommodation. By illustrating a shortage of accommodation within the area Council may be able to attract additional accommodation providers.	LCC, local accommodation providers	Business case developed.	3
A1.2.3	Promote recognised attractions such as Blast Furnace Park, Capertee Valley, Lake Wallace.	LCC	Appropriate marketing plan developed.	2
A1.2.4	Continue to target new markets in particular India, China and New Zealand and increase the use of technology.	LCC, overseas travel agencies	Develop and distribute appropriate collateral.	3
A1.2.5	Identify those businesses in the region which could diversify to serve the tourist industry.	LCC, local businesses	List of businesses developed.	2
A1.2.6	Update the Lithgow Festivals and Events Strategy 2010.	LCC	New strategy developed.	1
A1.2.7	Actively support the development and showcasing of Lithgow's lesser known heritage assets e.g the proposed Eskbank Rail Heritage Centre and Wolgan Valley Wilderness Trail.	LCC, COC Ltd	Promote assets on Council's website and Facebook pages.	1
A1.2.8	Liaise with the operators of the iconic Zig Zag railway to see what support can be offered to help with its reopening.	LCC, Zig Zag Railway	Discussions undertaken.	1
A1.2.9	In light of the BMLot being disbanded ensure that the Lithgow Tourism Advisory Committee (TAC) plays an active role in the development of local tourism.	TAC, LCC	Regular TAC meetings held with maximum attendance.	3
A1.2.10	Support the development of the Eskbank Rail Heritage Centre including the new Tourist train linking the Eskbank Precinct with a historically important sites such as Blast Furnace Park and the Lithgow State Coal mine via the State Mine branch.	LCC, COC Ltd, Lithgow State Mine Railway, Southern Short-haul Railroad and Elderton Engineering Services Pty Ltd, Southern Shorthaul Railroad (SSR), Railcorp Property	Regular meetings held with stakeholders; assist with sourcing funding.	1

7.4 Conclusion

Challenges for the Lithgow Retail Precinct

There are a number of challenges with the Lithgow retail precinct. Lithgow Main Street is long and essentially divided. There is an ongoing need to consolidate the core retail area to make the area more vibrant.

A Street Activation Zone initiative has been included in the latest LEP where the lower floors of premises have to be used for retail and not for office premises or public administration services (with the exception of DOCS).

Eateries/cafes and service providers such as lawyers and solicitors should be encouraged to be established at the end of Main Street whilst the middle core becomes the retail area.

The Lithgow Valley Plaza being separated from the Main Street retail strip also presents challenges by fragmenting the shopping precinct.

There is also an ongoing issue with absentee landowners many of whom tend not to invest in the old buildings they own which are susceptible to cosmetic and structural deterioration.

There are some access and mobility issues with different levels of roads and some sloping paths. In addition to this, complying with current shop accessibility requirements can be an issue to businesses. In particular, those shops which are in heritage listed precincts which can create issues with ramps, etc. This can be a costly exercise to address if undertaken on an individual basis.

The commercial precinct in Railway Parade does not positively effect the dynamics of Main Street as it takes trade away from the central retail precinct.

To summarise, Lithgow has a fragmented retail structure. There is a need to promote vibrancy in Main Street and recognise that some of the retail offering is also in the Lithgow Valley Plaza.

The greatest threat to the Lithgow Retail Precinct is potentially four-fold - the temptation to expand the current retail footprint which would result in the area becoming even more fragmented; the heavy reliance on the energy sector which results in a significant proportion of the local disposable income; the high ratio of low-income earners and the perceived/actual competition provided by neighbouring LGAs.

Opportunities

In the centre of Main Street there are opportunities to activate the back areas of properties and encourage 'shop-top housing' which would also help to generate foot traffic activity in Main Street. Mixed use businesses in the Pottery Estate adjacent to the Lithgow Valley Plaza also provide business opportunities. Liaising with realtors to encourage bulky goods retailers to this area could be beneficial.

The assessment indicates that the greatest opportunities potentially lie within the following sectors:

- Menswear
- Shoe shops
- Large electrical retailers

In addition to this, building on tourism/visitors/local residents and connecting all these markets with local events, Main Street's heritage, the cultural precinct, Eskbank House, Lake Pillans, Blast Furnace Park and back to the indoor pool centre at the opposite end of Main Street, could encourage greater retail expenditure and foot traffic.

However, businesses also need to meet the needs of customers in particular visitors, such as being open over the weekend which is not currently common practice.

It is evident that some landlords have taken on board the need to maintain their property and this should be actively encouraged. It is also critical that the benefits of providing good customer service be clearly explained, understood and ultimately embraced by business owners.

Parking is not generally considered to be a major issue in Lithgow. However, connectivity between the various laneways and the Main Street itself could be promoted to encourage parking at the rear of premises.

The majority of people using the local retail services resided in Lithgow itself. Of the 184 Lithgow residents, 11.4% shopped outside the LGA the most - namely in Penrith and Bathurst. 14% of survey respondents resided outside the area with some making specific shopping trips to Lithgow. 45% of respondents usually residing in the Blue Mountains were most likely to do the majority of their shopping in Lithgow.

Resources are needed to develop and implement an effective marketing plan and associated promotions/activities. These should be regularly targeted towards both the resident population and those residents and businesses located in neighbouring LGAs (e.g Blue Mountains) and further afield. Local realtors should also be engaged to help promote the various retail opportunities identified.

The framework is essentially in place for Lithgow's Main Street to grow but it needs to be marketed appropriately and consistently.



8 Appendix A

Survey delivery program 2016

Lithgow Retail Shopper Survey Delivery Program

Dated: 25 May 2016

Author: Arabella Perugini-Sheere

A.P. SHEERE CONSULTING

The following document outlines the Lithgow Retail Shopper Survey Delivery Program.

1.0 Survey questions

See pdf attached. This applies to both the face-to-face surveys and online survey monkey.

2.0 Online survey

Key employers will be advised of the online survey component of this initiative by the 27th May 2016.

The online survey will be open for one week only and end on Sunday 5th June 2016.

A.P. SHEERE CONSULTING will create a 'survey monkey' account on behalf of Lithgow City Council.

Access details to review the online survey will be provided to the EDO for review and approval prior to it being distributed.

It is suggested that the survey link be distributed by Council's EDO so that recipients are assured that this is a Council run project.

Suggested recipients include the following: Lithgow City Council staff, Thales, WSU, Ferrero, Westfund, Dept of State Debt Recovery.

Note: Arabella can distribute to the Dept. State Debt Recovery as she knows the PA to the General Manager there.

3.0 Face to face surveys

It is suggested that a sample of 40 -50 respondents be targeted with a mixture of demographics.

Each survey session is expected to last no longer than 2 hours.

The face-to-face surveys will begin week commencing 30th May 2016 and be scheduled as follows:

Survey session date	Location	Surveyers
Tuesday 31 May 2016	Cook Street Plaza	Matthew Brewster and Arabella Perugini-Sheere
Friday 3rd June 2016	Main Street banking area	TBC
Saturday 4th June 2016	Main Street, Library	Arabella Perugini-Sheere

4.0 Draft and Final Report

All the face-to-face survey responses will be provided to A.P. SHEERE CONSULTING for review and assessment.

A.P. SHEERE CONSULTING will create a separate report from the online survey monkey and include findings in the Retail Shopper Survey Report.

It is expected that the draft report will be submitted to Council week commencing 20th June 2016 for review.

Note: Arabella is on leave overseas from 23rd June to 14th July 2016 and will have limited internet access.

Once Council has had sufficient time to review the draft a final version will be developed and submitted.

It is expected that a presentation will be made to the EDAC members at a date to be confirmed by Council.



8 Appendix B

Q10 What shops would you like in Lithgow?

Q10. What other shops would you like in Lithgow?	Number	%
kmart	66	14.9
big w	50	11.3
menswear	37	8.4
entertainment - cinema	33	7.4
none	31	7.0
shoe shops	23	5.2
womens clothing	19	4.3
book store	11	2.5
deli	11	2.5
restaurants	11	2.5
spotlight	11	2.5
bigger bunnings	10	2.3
best and less	7	1.6
café	6	1.4
electrical	6	1.4
entertainment - bowling	6	1.4
furniture	6	1.4
sushi bar	6	1.4
childrens clothes and shoes	5	1.1
priceline	5	1.1
bike shop	4	0.9
boutiques	4	0.9
camping/outdoor	4	0.9
food shops	4	0.9
sports store	4	0.9
rivers store	4	0.9
toy store	4	0.9
food coop	3	0.7
petbarn	3	0.7
variety stores	3	0.7
white goods	3	0.7
play centre	3	0.7
temt	3	0.7
antiques	2	0.5
fruit and veg	2	0.5
hungry jacks	2	0.5
chemist warehouse	2	0.5
cotton on	2	0.5
hobby shop	2	0.5
jb hifi	2	0.5
another hardware	2	0.5
boost juice	1	0.2
curtain store	1	0.2
ella bache	1	0.2

jb hifi	1	0.2
laser clinic	1	0.2
myer	1	0.2
music store	1	0.2
sportsgirl	1	0.2
thai food	1	0.2
outlets and seconds	1	0.2
baker	1	0.2
suit hire	1	0.2
theatre	1	0.2
art supplies	1	0.2
computer repaires	1	0.2
harris farm	1	0.2
jeanswest	1	0.2
supplement shop	1	0.2
guzman y gozman (mexican food)	1	0.2
pauls warehouse	1	0.2
photoshop	1	0.2
ses	1	0.2
vithealth	1	0.2
bras n things	1	0.2
dan murphys	1	0.2
florist	1	0.2
jay jays	1	0.2
Total suggestions	449	101.4



8 Appendix C

Lithgow Valley Plaza shops (May 2016)

Fresh Food

Golden Sunshine Bakery

Shop 11/12
02 6352 4303

Little Al's Bakery

Shop 18A

Sunnyridge Meats

Shop 23
02 6352 1113

Liquorland

Shop 25
02 6352 3230

Coles Supermarket

Shop 27
02 6352 1966

Eating

Michel's Patisserie

Kiosk 1
02 6352 2422

Donut King

Kiosk 2

Plaza Fish & Chips

Kiosk 3

Golden Horse

Kiosk 4

Indus Valley Restaurant

Shop 4
02 6352 4449

Subway

Shop 7

Iska Kebab

Shop 43
02 6352 2933

ATMS

Commonwealth Bank (near
Target)

Fashion

Rockmans

Shop 6
02 6352 2439

Just Jeans

Shop 13/15
02 6351 4781

Lowes Menswear

Shop 35
02 6351 4409

Prouds, The Jewellers

Shops 40/41
02 6351 2660

Millers Fashion Club

Shop 47
02 6352 4358

Crossroads

Shop 48
02 6351 2022

Williams Shoes

Shop 49
02 6351 3348

K-Teens

Services

NRMA

Shop 5
02 6351 2233

Tranquil Massage

Shop 18B
04 5052 0880

TSG Smokes

Shop 26

Telstra Shop

Shop 31
02 6352 4944

Neo Nails

Shop 38
02 6351 3880

Bliss Hair Design

Shop 41A
02 6352 2893

Blooms the Chemist

Shop 42
02 6352 2141

Services NSW

Shop 51

Gifts

Target

Shop 39
02 6350 7100

Sanity

Shops 21/22
02 6352 3950

The Reject Shop

Shop 36
02 6352 5392

EB Games

Shop 37
02 6351 3479

Sportswear

Shop 38A
02 6351 4040

Aussie SuperPets

Shop 46
02 6351 2999

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