THE
Seven Valleys ®

SEVEN VALLEYS BRAND STRATEGY & MARKETING PLAN

SEPTEMBER 2024

Seven Valleys Brand Strategy & Marketing Plan Situation Analysis Report was prepared by: **Destination Marketing Store**

Acknowledgement of Country

We acknowledge the Traditional Custodians of the lands and waters on which Lithgow City Council is located, the Wiradjuri Nation, and pay our respects to Elders past, present, and emerging.

We acknowledge the Traditional Custodians of Country throughout Australia and recognise their continuing and inherent connection to Country.

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1. INTRODUCTION

Like the development of the Seven Valleys Destination Action Plan (DAP), the brand and identity will be integrated with the **region's broader economic development priorities**. This recognises the significant contribution of tourism and the visitor economy to the region's economy.

As a result, this project requires the development of a **place brand** that will meet the aims and needs of both the visitor economy and the broader economy, including attracting investment, new industries and new residents. This means that the brand strategy will need to consider a broader audience than strictly those who are visiting the region for leisure or visiting friends and relatives (VFR).

GUIDING PRINCIPLES

It is important to establish guiding principles to underpin the Brand Strategy and Marketing Plan (the Plan). The guiding principles will ensure that the Plan is holistic and is developed to meet the needs of the target market segments.

There are six guiding principles:

1. Marketing strategies, activities and campaigns are underpinned by the brand strategy and positioning.

2. Adopt a visitor and relocator centric approach.

3. Be results oriented and responsive.

4. Foster and strengthen collaboration and cooperation between sectors and businesses.

5. Make informed and evidence-based decisions.

6. Establish the foundations for long-term, sustainable growth of the LGA's visitor and broader economy. Key to this is building civic pride and focusing on increasing length of stay of the visitor, which can be inherently linked to attracting relocators to the region.

VISITATION SNAPHOT FROM THE SEVEN VALLEYS DAP

To develop the Brand Strategy and Marketing Plan for LCC, it is important to understand the visitation data available. The DAP and supporting Situation Analysis will provide relevant insights used in the development of this Plan. A key snapshot of the insights from the DAP is provided below.

Review of data from national and local sources[1] found the following the top 20 research insights (from 2018 - 2022**)**:

1. Total visitation has averaged 0.5 million visitors per year.

2. Overnight visitors comprised 40% of visitors and contribute $67 million per year.

3. Day visitors comprise 60% and contribute approx. $24 million per year.

4. International visitors comprise less than 1% and contribute < $3 million per year.

5. Overnight visitors contribute 72% of total visitor expenditure.

6. Total visitation to Lithgow LGA topped 0.7 million in 2019.

7. Bushfires, floods and Covid-19 have impacted total visitation by 53% between 2019 and 2021.

8. Total visitation rebounded from these impacts by 70% in 2022.

9. Seasonal variations show the attraction to visitors of the autumn months.

10. The primary geographic segment is Sydney (58% overnight visitors, 51% day visitors), secondary segments are fragmented throughout NSW.

11. Interstate markets are small (6% total).

12. Different generational groups for overnight and day visitors.

13. 33% of overnight visitors and 25% of day visitors are Millennials (age: 27-42).

14. Primary lifestyle segments are Millennials (33%) Gen X families (30% - age: 43-58).

15. Purpose of travel is mainly leisure/holiday (51%) Visiting Friends and Relatives (VFR) (30%), and business (16%).

16. Main activities include nature, active sports, dining and visiting family.

17. Visitation for nature activities is very high (40% overnight and 24% day).

18. Arts and heritage activities also popular (13% overnight and 9% day).

19. Commercial accommodation is popular (42%) and free camping (25%).

20. VFR accommodation accounts for 27% of all accommodation.

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[1] TRA (2022) www.tra.gov.au/Regional/destination-research

Who is travelling to the region & travel party

Figure 1.
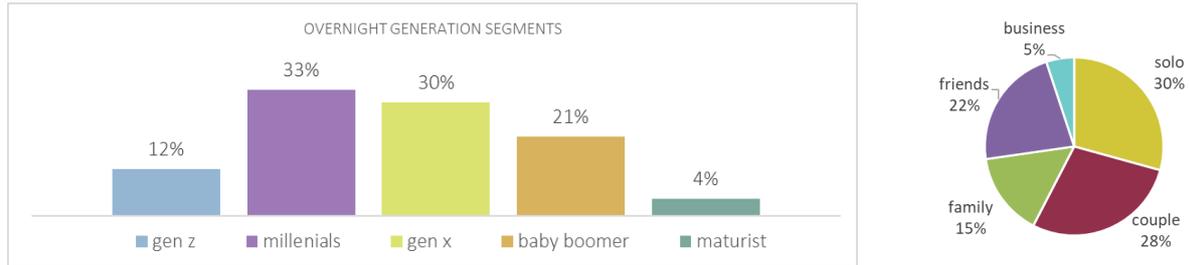
Age brackets; Gen Z: 11-26, Millennials: 27-42, Gen X: 43-58, Baby Boomers: 59-68, Maturist: over 68)

Source: Tourism Research Australia

Review of TRA data from 2018-2022 (Figure 1) highlights the key market segments for future marketing, and product development. Data for overnight visitors shows the highest segment as Millennials followed by Gen X.

In line with the age analysis, TRA **overnight** travel party data also suggests dominance of solo travellers and couples (58%) over groups of families (15%) and friends (22%).

Overnight Millennials enjoy bushwalking and spending time in National Parks.

ECONOMIC REVIEW

The following graphs and data were sourced from the Australian Bureau of Statistics profile.id site, to gain a better understanding of the Lithgow region from an economic point of view.

Migration by age group 2021

Lithgow City Council			
Age group	In migration	Out migration	Net migration
5 to 11 years	+265	-266	-1
12 to 17 years	+174	-186	-12
18 to 24 years	+170	-424	-254
25 to 34 years	+483	-487	-4
35 to 44 years	+333	-300	+33
45 to 54 years	+354	-264	+90
55 to 64 years	+400	-280	+120
65 years and over	+492	-398	+94
Total population	+2,671	-2,605	+66

Source: Australian Bureau of Statistics, Census of Population and Housing , 2021 (Usual Residence Data). Compiled and presented in profile.id by .id (informed decisions).

Net migration by age group 2021 (5 years)
Lithgow City
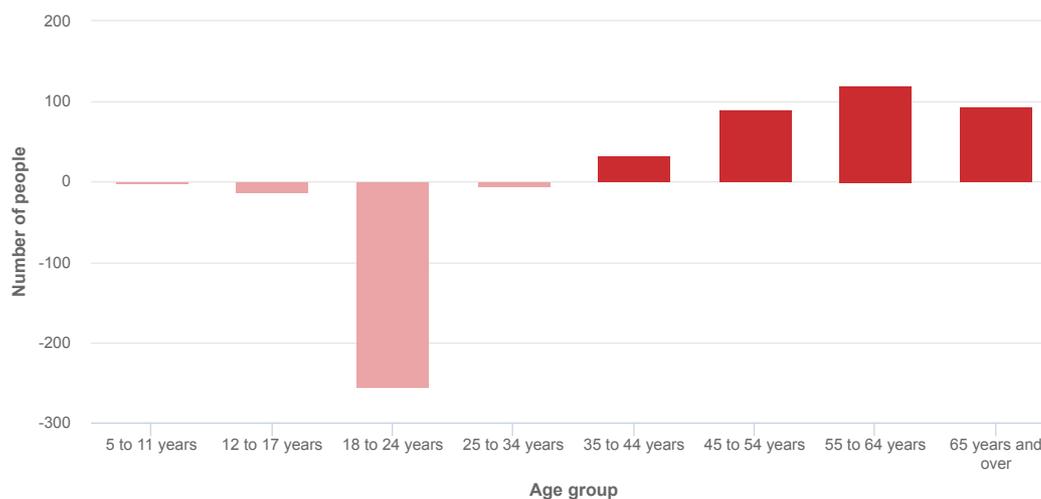
Source: Australian Bureau of Statistics, Census of Population and Housing, 2021 (Usual residents data). Compiled and presented in profile.id by .id (informed decisions).

Insight:

This chart clearly demonstrates that over a five-year period to 2021 there is an increase in people aged 45 plus moving the Lithgow LGA. With a massive migration of people aged 18-24 years leaving the region. What would be interesting to understand from the people moving to Lithgow is if they already have a connection to the region and what their motivations to move to Lithgow are.

Seven Valleys Brand Strategy & Marketing Plan - Situation Analysis

Age-sex pyramid, 2021

Lithgow City ■ **Regional NSW** ■

Source: Australian Bureau of Statistics, Census of Population and Housing, selected years between 1991-2021 (Enumerated data).
Compiled and presented in profile.id by .id (informed decisions).

.id informed decisions

Insight:

Lithgow has an aging population. Therefore, the industry sectors such health and aged care services will become increasingly important for the Lithgow LGA. 55 – 64-year-old men and women make up the largest proportion of the population. However, the working age population 20-44 years old men and women make up the smallest population. This doesn't only impact the health and the age care sector, it also impacts other industries or lack of investment in other industries and small business. This in turn can impact the vibrancy and viability of the region.

So, the question is - what could attract the 18 – 45-year-old markets to the region? Which audience within this demographic does Lithgow want to attract?

Highest qualification achieved

Lithgow City - Persons aged 15+ (Usual residence)	2021			2016			Change 2016 to 2021
Qualification level	Number	%	Regional NSW %	Number	%	Regional NSW %	
Bachelor or Higher degree	2,023	11.6	17.8	1,524	8.7	14.5	+499
Advanced Diploma or Diploma	1,314	7.5	8.7	1,146	6.6	8.2	+168
Vocational	4,573	26.2	24.4	4,294	24.6	23.6	+279
No qualification	7,345	42.2	39.1	7,572	43.3	41.7	-227
Not stated	2,168	12.4	10.0	2,954	16.9	12.1	-786
Total persons aged 15+	**17,423**	**100.0**	**100.0**	**17,490**	**100.0**	**100.0**	**-67**

Source: Australian Bureau of Statistics, Census of Population and Housing 2016 and 2021. Compiled and presented by .id (informed decisions).

Insight:

The largest proportion of residents of 15 years and over have no qualifications. Research has shown that there is a direct correlation between people's level of education and their standards of health, social and community cohesion and economic growth. For example, the higher the education the less likelihood of health issues around obesity and type 2 diabetes. However, a mix of education and qualification levels is what forms vibrant and thriving communities, so there is an opportunity for Lithgow to focus on attracting both University qualified visitors or residents, as well as those with vocational training.

Weekly household income

Lithgow City - Total households (Enumerated)	2021		
Weekly income	**Number**	**%**	**Regional NSW %**
Neg/Nil Income	168	2.0	1.7
$1 - $149	85	1.0	0.7
$150 - $299	162	1.9	1.4
$300 - $399	300	3.5	2.6
$400 - $499	890	10.5	7.3
$500 - $649	477	5.6	5.1
$650 - $799	686	8.1	7.3
$800 - $999	644	7.6	7.0
$1,000 - $1,249	641	7.5	7.7
$1,250 - $1,499	610	7.2	7.5
$1,500 - $1,749	430	5.1	5.4
$1,750 - $1,999	396	4.7	5.3
$2,000 - $2,499	777	9.1	10.3
$2,500 - $2,999	456	5.4	6.5
$3,000 - $3,499	361	4.2	5.3
$3,500 - $3,999	195	2.3	3.2
$4,000 - $4,499	120	1.4	1.7
$4,500 - $4,999	232	2.7	2.8
$5,000 - $5,999	124	1.5	1.8
$6,000 - $7,999	88	1.0	1.4
$8,000 or more	43	0.5	0.6
Not stated	627	7.4	7.4
Total households	**8,512**	**100.0**	**100.0**

Source: Australian Bureau of Statistics, Census of Population and Housing 2021. Compiled and presented in profile.id by .id (informed decisions).

Insight:

The weekly household income is a reflection of the educational levels as stated above. The $400 - $499 household income is above the NSW regional average (7.3%) at 10.5%, and the $2,000 - $2,499 household incomes are below the regional NSW average (10.3%) at 9.1%.

This means there is an opportunity to attract relocators, visitors and businesses who support vocational work, as well as people with higher education.

Industry sector of employment

Lithgow City - Employed persons (Usual residence)	2021			2016			Change
Industry sector	Number	%	Regional NSW %	Number	%	Regional NSW %	2016 to 2021
Agriculture, Forestry and Fishing	220	2.6	5.1	218	2.8	5.7	+2
Mining	662	8.0	2.4	694	8.9	2.4	-32
Manufacturing	410	4.9	5.6	414	5.3	6.0	-4
Electricity, Gas, Water and Waste Services	274	3.3	1.2	283	3.6	1.3	-9
Construction	613	7.4	9.4	521	6.7	8.7	+92
Wholesale trade	177	2.1	2.0	174	2.2	2.0	+3
Retail Trade	747	9.0	9.4	760	9.7	10.3	-13
Accommodation and Food Services	690	8.3	7.5	701	9.0	7.9	-11
Transport, Postal and Warehousing	353	4.2	3.7	355	4.6	4.0	-2
Information Media and Telecommunications	52	0.6	0.8	62	0.8	0.9	-10
Financial and Insurance Services	161	1.9	1.9	158	2.0	2.0	+3
Rental, Hiring and Real Estate Services	102	1.2	1.3	104	1.3	1.4	-2
Professional, Scientific and Technical Services	277	3.3	4.9	229	2.9	4.5	+48
Administrative and Support Services	325	3.9	3.2	264	3.4	3.3	+61
Public Administration and Safety	843	10.1	7.2	745	9.6	7.2	+98
Education and Training	609	7.3	9.2	500	6.4	9.0	+109
Health Care and Social Assistance	1,054	12.7	16.3	906	11.6	14.4	+148
Arts and Recreation Services	99	1.2	1.2	89	1.1	1.2	+10
Other Services	318	3.8	3.8	302	3.9	3.9	+16
Inadequately described or not stated	324	3.9	3.9	319	4.1	3.8	+5
Total employed persons aged 15+	**8,310**	**100.0**	**100.0**	**7,798**	**100.0**	**100.0**	**+512**

Source: Australian Bureau of Statistics, Census of Population and Housing 2016 and 2021. Compiled and presented by .id (informed decisions).

Insight:

It is not surprising given the aging population that the Health Care and Social Assistance sector is the largest employment sector at 12.7% (however this is lower than the regional NSW level of 16.3%). Followed by Public Administration and Safety at 10.1%, Retail at 9%, Accommodation, Food and Services at 8.3%, mining at 8%, education at 7.3% and construction at 7%. This would indicate that the region relies significantly on public sector and government-based industries.

This will be important to create a place brand that attracts new visitors, residents and businesses. This review provides an opportunity to decide who and what industries should be attracted to the region.

Occupation of employment

Lithgow City - Employed persons (Usual residence)	2021			2016			Change
Occupation	Number	%	Regional NSW %	Number	%	Regional NSW %	2016 to 2021
Managers	935	11.3	13.4	738	9.5	13.0	+197
Professionals	1,112	13.4	19.2	954	12.2	18.1	+158
Technicians and Trades Workers	1,377	16.6	14.5	1,358	17.4	14.8	+19
Community and Personal Service Workers	1,161	14.0	13.2	1,003	12.9	11.9	+158
Clerical and Administrative Workers	1,068	12.9	11.7	1,035	13.3	12.4	+33
Sales Workers	629	7.6	8.5	658	8.4	9.6	-29
Machinery Operators And Drivers	936	11.3	6.9	972	12.5	7.1	-36
Labourers	945	11.4	10.9	940	12.1	11.4	+5
Not stated or inadequately described	141	1.7	1.8	141	1.8	1.6	0
Total employed persons aged 15+	**8,304**	**100.0**	**100.0**	**7,799**	**100.0**	**100.0**	**+505**

Source: Australian Bureau of Statistics, Census of Population and Housing 2016 and 2021. Compiled and presented by .id (informed decisions).

Insight:

Interestingly, the number one occupation is Technicians and Trade Workers at 16.6% followed by Community and Personal Services Workers at 14%, and Professionals at 13.4%. This would seem to match the household income and education levels of residents. With labourers, machinery operators and drivers, and salespeople making up 41% of the workforce which may also correspond with those who do not have any higher education or certificate qualifications.

Household type

Lithgow City - Total households (Enumerated)	2021			2016			Change 2016 to 2021
Households by type	Number	%	Regional NSW %	Number	%	Regional NSW %	
Couples with children	1,879	21.0	24.8	1,933	22.4	25.4	-54
Couples without children	2,314	25.9	27.7	2,151	24.9	27.0	+163
One parent families	1,010	11.3	10.9	965	11.2	11.0	+45
Other families	84	0.9	0.9	73	0.8	0.9	+11
Group household	203	2.3	3.1	188	2.2	3.1	+15
Lone person	2,830	31.6	26.1	2,559	29.6	25.5	+271
Other not classifiable household	434	4.9	4.5	664	7.7	5.1	-230
Visitor only households	189	2.1	2.0	106	1.2	2.0	+83
Total households	**8,943**	**100.0**	**100.0**	**8,639**	**100.0**	**100.0**	**+304**

Insight:

Couples without children made up 25.9% which includes older households followed by couples with children 24.8%. Families only represent 10.9% and 31.6% are lone households which is above the regional NSW average.

The World Health Organisation has identified that globally there is a loneliness epidemic and this in part correlates with the global increase in lone households in developed countries. Attracting families and couples will assist in bringing vibrancy and vitality to the region. Equally attracting small business investment and new industries to region that are future-focused or that can leverage the natural environment and available infrastructure would assist in the ongoing sustainable growth of the LGA.

With a growth in these market segments (families and younger couples) this would also have an impact on the Visiting Friends and Relatives (VFR). This presents an opportunity to grow the visitor economy along with attracting markets that are seeking experiences that the Lithgow LGA has to offer.

Given the geographical location of Lithgow to the Blue Mountains and Sydney, attracting people with higher education levels and income to relocate to the Lithgow region might be more difficult. However, with lower housing prices, an opportunity for the region is attracting younger markets (including families who have vocational training and have skills and trades). Also, attracting business and industry investments that are future-focused (such as renewables), or businesses that can tap into the increase interest of nature-based tourism is important for setting Lithgow up for success.

Infrastructure Investment

The below tables of significant public and private investments in the region since 2018 was also identified in the DAP.

Major Private Investments	Est. total project value	Stage of delivery
Maldhan Ngurr Ngurra Lithgow Transformation Hub	Not available	Complete
Black Gold Motel expansion	Not available	Complete
The Foundations, Portland	$5 million	In Progress
Zig Zag Railway restoration	Not available	Complete
A wide range of enhancements or new tourism developments on private property		

Major Public Investments	Est. total project value	Stage of delivery
Ecotourism investments including the Gardens of Stone and the Wollemi Great Walk	$50 million	In Progress
Zig Zag Railway restoration	~$6 million	Complete
Lithgow mountain bike transformation project	$3.5 million	In Progress
Glow Worm Tunnel precinct upgrades	$4.1 million	Complete
Lithgow Main Street revitalisation – Stage 2	$4.5 million	Due to Start in Early 2025
Great Western Highway upgrades – Katoomba to Lithgow	$4.5 billion	Not Going Ahead
Portland Foundations Trunk Infrastructure	$1.5 million	Hasn't Started
Secret Creek wildlife facilities and native animal hospital, visitor centre and walking track	$2.5 million	In Progress

Insight:

The investment that has already been made in the Lithgow LGA presents a big opportunity to leverage these investments to attract new residents, businesses, industry and visitors.

2.PRIMARY CONSUMER RESEARCH

Online Forum 1 - Visitors to Lithgow

The web forum was designed as a qualitative research tool to explore the perceptions, attitudes and experiences of visitors to Lithgow and the Seven Valleys. Designed as an internet-based focus group, participants entered into a dialogue around travel experiences in the destination area and explored their motivations to travel there. By exploring these travel experiences, a clearer picture was determined of the current perceptions of the visitor markets. The forum ran for 3 days and was moderated by DMS staff; with 20 discussion questions and 3000+ words collected. The participants were screened to include the following criteria.

- o 12 participants that had travelled to Lithgow and the Seven Valleys and stayed for a minimum of 2 nights

- o Experienced visitors who had been to the area many times with a wide experience of different towns, places and activities.

- o All visited within the last 5 years (after Covid lockdowns)

- o Gen X and Gen Y, primarily families and couples

- o All participants reside in Sydney

The results were analysed by Destination Research to further categorise the experiences and motivations for travel. Through a process of coding and theming, the results were grouped and categorised to show the most common themes, while highlighting some of the key thoughts and sentiments of participants. The results are presented under the following topics:

- o Key experience themes

- o Motivations and Traveller Typologies

- o Regional comparisons

- o Sources of information and bookings

KEY EXPERIENCE THEMES

Four key experience themes were derived from the data analysis. These themes encapsulate the perceptions and experiences of participants. Each are described further in the following pages along with the comments of participants.

A quick escape

A little break away from the hustle and bustle of city life is all the motivation you need

Proximity

Its not too far to travel but its another world away from the city

Base camp

From Lithgow you can go further West or up to the Blue Mountains. Its a good place to stay for that area.

Authenticity

Lithgow has an authentic charm
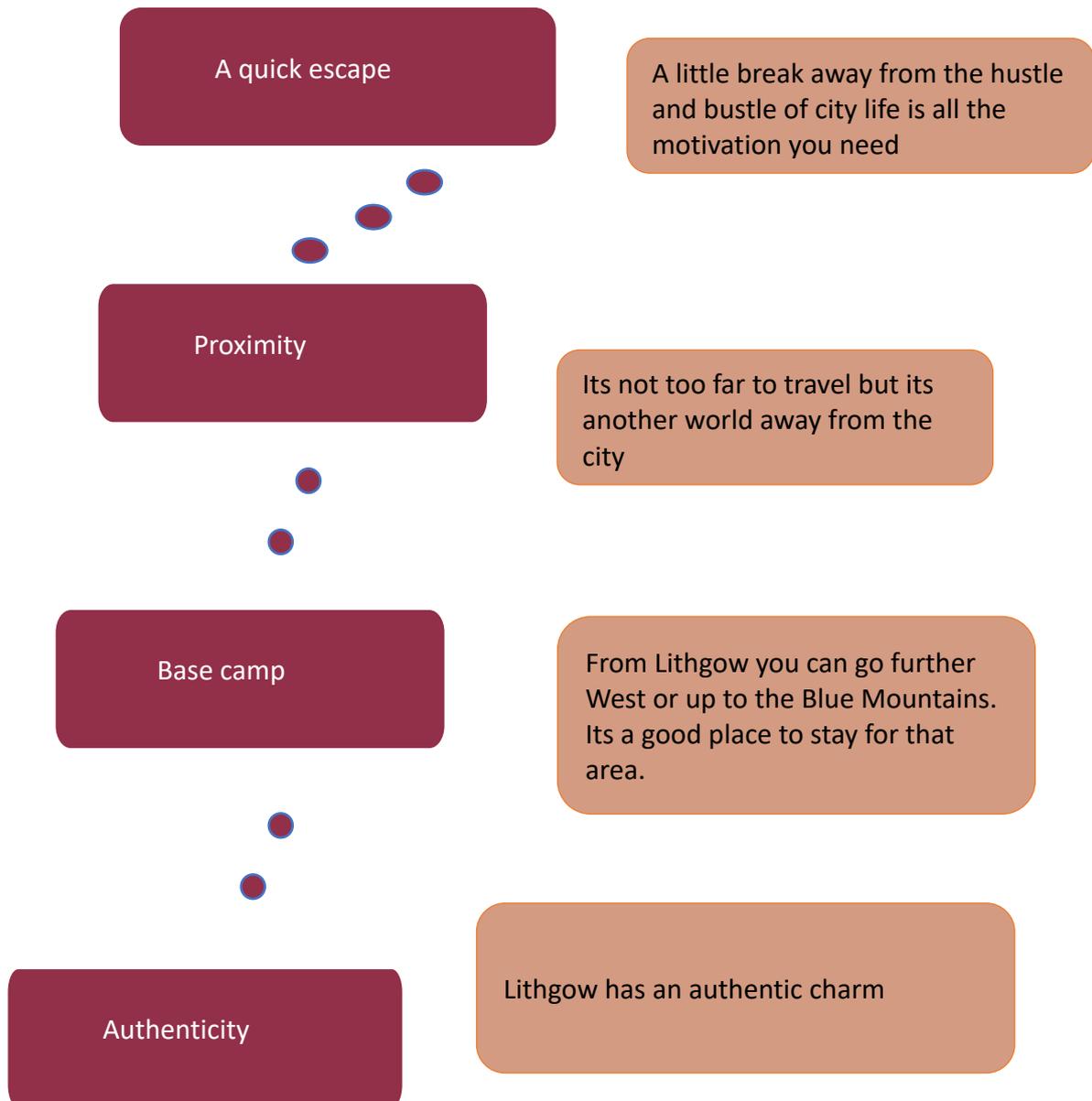
A Quick Escape

The Lithgow region is seen as an ideal location for those who want a quick escape from city life, routines and hectic pace.

Many overnight visitors have been on multiple trips - both for the day and overnight. This suggests there may be opportunities to convert more day-trippers to longer stays – a key priority of the DAP.

Wanted to get away from the skyscrapers and buildings

Wanted to really relax and enjoy a bit of nature and some quietness. City life is so busy and hectic.

Escape the city life

Get away

Its good to get away from Sydney and be in the fresh air

Getting away from work and city life

I love to escape Sydney whenever we can-we make the most of being able to get away and explore

Escape for a little break

Our younger son had just finished exams and needed a break from studies

With family

A little break away from the Hustle and bustle of city life is all the motivation you need

I just really wanted to get away from work and the city and take a break from the house. The whole family wanted a weekend away.

Quick escape   **Proximity**   **Base camp**   **Authentic**

Proximity to the City

The proximity of Lithgow to Sydney is an important consideration for travellers looking for a quick escape.

It is just a nice quiet place to leave the hustle and bustle of Sydney that wasn't too far.

I would go back to the region for a revisit because it is quite close to Sydney. After a few years, I would want to revisit and relive the experience again

"not too far"

Its not too far to travel but its another world away from the City

Proximity to Sydney

Even on a day trip you feel like you're away for a long holiday, so peaceful and relaxing

Short drive

It's wider than the Grand Canyon and I don't have to fly to Vegas and drive all day to get there.(Capertee Valley)

Lithgow is not too far away from Sydney and doable for a day trip.

Closer = cheaper

It is more cost effective and closer to Sydney

Quick escape

Proximity

Base camp

Authentic

Base Camp

The base camp is a place to launch into nature, visit family and friends and a convenient spot from which to undertake a regional itinerary.

It was the most central and convenient to get to places, shops and cafes.

From Lithgow you can go further West or up to the Blue Mountains. Its a good place to stay for that area.

Tour around

Convenience

Convenient since near city centre. Able to go to the shops as it is nearby. Great base to move anywhere

Close to town

Stayed near the town centre as it was close to cafes and restaurants for relaxing at night and was close to entertainment..

I would stay somewhere a bit more central probably next time now that I have done the igloos.

The first part was Airbnb and it was a fantastic location for all the experiences, walks, Zig Zag railway, glow worm tunnels and proximity to the town.

Visit friends & family

It is a great base to explore there is so much to do and allowed us to catch up with loved ones which was great

Quick escape

Proximity

Base camp

Authentic

Authenticity

Both Lithgow and the surrounding towns of the Seven Valleys are seen as having an **authenticity** to the history with an accompanying old town charm.

Accommodation

Authentic and unique

We stayed 4 nights at a very quaint private house in Lithgow that we sourced through AirBnB

Lithgow is a large country town which is close to Sydney and its rather unique in a way

Old town charm and history and authenticity.

Authentic history

History

So well preserved and I love the feeling of being in an old town with so much history.

You can feel the history and the past when you ride the zigzag - it is a piece of the past and the council needs to keep maintaining it for as long as they can

I love the ZigZag railway and I first visited it as a child and really loved it so it has a special place in my memories

Quick escape

Proximity

Base camp

Authentic

Motivations and Typologies

Escape
A little break away from the Hustle and bustle of city life is all the motivation you need.

Travelling with your family/partner
Good time to get away and spend time together before our wedding

Recharge and relax
We felt that a break away from the everyday norms would recharge us

Being with family/friends
Thought it would be great to catch up with him and also visit some places over there to explore and walk.

Hobbies
* MX-5 owners club
* I took my mountain bike with me
* we like our golf
*fishing and bushwalking

Connecting with nature
Wanted to really relax and enjoy a bit of nature and some quietness

Driving in the country
MX-5 owners club run

Staying in unique accommodation
It was the reason we even thought about the area. (Igloos)
I chose it more for the accommodation rather than the actual location (Lake Lyell).

A full range of travel motivations were identified as related to the seven Traveller Typologies identified by Tourism Australia[2]. This highlights the attraction of the region for a range of reasons and motivations. Travel for transformation was the only one not identified in the forum participants. This means it is not top of mind and is not a key driver/motivator for visiting the region.

The observation from the forums was that participants wanted to fill their cup through restorative activities such as partaking in hobbies as well as recharging and relaxing. Connection with family and nature was also part of restoring energy levels and escaping the city to somewhere remote – embracing a sense of freedom.

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[2] https://www.tourism.australia.com/en/insights/consumer-research.html

A 3-day Itinerary

Participants were asked to create a three-day itinerary for the Lithgow Region, with all participants creating itineraries that were quite similar in content. Interestingly, all itineraries created by participants had activities in the Blue Mountains and/or Jenolan Caves.

Day One	Day Two	Day Three
Explore Lithgow and setup a base, explore heritage sites and hiking to lookouts.	Explore the Blue Mtns, 3 sisters, scenic world, Katoomba	Drive down to Jenolan caves and explore the area
At hydro majestic having a over night stay	scenic world for The attraction	Caves and look for glow worms
Visit mines and underground caves	Going on bushwalks and visiting scenic lookouts	Going on a foodie tour , incorporating visits to cheese and wine tasting
Full day hike somewhere	include the wider region such as Blue Mountains	Jenolan Caves
A day in the town and closest walk	A day at Lake Wallace and the mines	A day travelling to the caves or further west
Ride on the Zig-Zag railway Drive to Newnes to see the glow worm tunnel Have dinner at Secret Creek	Take a trip by helicopter to fly over the valley and land at Jenolan Caves.	Take Bells Line of Road in one direction to stop at Mt Tomah gardens and the Pie in the Sky.
1 or 2 nights camping or igloos in the area	Hiking like glow worms or Berghoffer pass Food and wine trail	A stop in the blue mountains on the way or the way back
Jenolan Caves	stay at Lake Lyell and explore the Lithgow places	Go to Blue Mountains to explore
Zig Zag Brewery (hopefully reopen soon!), Zig Zag Railway, the museum,	the Jenolan Caves	The glow worm tunnel and at least one or two of the national parks.
Catching up with friends and family in Lithgow – stay at the Zigzag Motel, because I've had such a good experience there before	Jenolan Caves and the zigzag railway	The zigzag railway bushwalking lunches and dinners out at local cafes restaurants

Participant comments:
- I think we had very similar plans to combine with Blue Mountains
- I concur with going to the Blue Mountains and Jenolan Caves as that is the perfect supplement to visiting Lithgow

Perceptions of the Lithgow Region

From the visitor perspective, the Lithgow region is a broad area that includes many places and experiences. When asked "Do you recognise these listed places as being part of the Lithgow region?" almost all included Jenolan Caves.

However, the recognition of the region is not always accurate as other places in NSW (shown with a *) were also thought to be part of the region.

# responses	Place
11	Jenolan Caves*
6	Wollemi
5	Gardens of Stone
4	Seven Valleys
4	Wallerawang
2	Deepwater *
2	Snowy Valleys*
2	Happy Valley*
1	Wildflower Gardens*

From the visitor perspective the Lithgow region is also part of the "Blue Mountains". This was evidenced by the intermingled description of their experiences and highlighted in the 3-day itinerary design (previous page) which included elements of the Blue Mountains from almost all visitors.
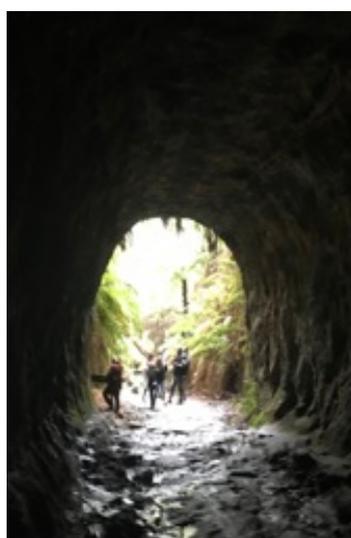
Comparisons to Blue Mountains

Visitors were asked which aspects of Lithgow and the surrounding areas appeal over its neighbouring regions such as the Blue Mountains. Overall participants perceived that there were quite a few distinct differences between Lithgow and the Blue Mountains.

Blue Mountains	Lithgow
touristy	authentic
busy	quiet
expensive	budget friendly
impersonal	people friendly
well known	less known

I prefer the scenery, the peace and quiet, and atmosphere, the people, the fact our family live here and

It was a much less well known part of the area and Katoomba and the Blue Mountains has a tendency to be a bit too touristy and pricey

There is something about Lithgow and the nature just has a place in my heart

Blue Mountains I find is great for a day trip and there is so much to do but it gets too busy. I prefer to go that bit further where some people don't go

I prefer Lithgow over the busier Blue Mountains for its tranquility and less touristy vibe

Perceptions of Place

Visitors were asked to describe their perception of Lithgow as a town. The following 6 points summarise their descriptions.

1. Lithgow is a great base to launch into **diverse places and activities**

2. Some compared it to a **museum surrounded by scenic natural landscapes**

3. Emphasizes the city's **peacefulness, and convenient amenities**

4. Appreciates Lithgow's **quaint shops, cafes, and eateries**

5. Safe despite some **perceived roughness** compared to other cities

6. Notes a mix of **nostalgia and potential** for improvement, seeing it as a preserved yet a little dated town - worth visiting.

Participants were asked which one of these images appealed most and why.

1. Much of the discussion related to keeping the experiences authentic. For example, the Capertee Lookout was liked by most as it is an experience that is unique to the area and a "way that you can really connect with nature".
2. The Bubble Tent was also liked by some for its uniqueness.
3. Visitors preferred experiences aligned with their hobbies or interests, e.g. "don't like cycling", "no desire to go 4wd" ,"don't like goats' cheese", "wouldn't suit me and my family at the moment - they would prefer to be outdoors running".

Most Visited Experiences

Visitors had been to many places within the region, with almost all visiting Lithgow city.

# responses	Places visited
10	Lithgow City
7	Zig Zag Railway
7	Glow Worm Tunnel at Wolgan Valley
6	Lake Lyell
4	Wolgan Valley
4	Hartley and Little Hartley
3	Gardens of Stone National Park
3	Lithgow Small Arms Factory Museum
3	Lithgow State Mine Heritage Park
3	Wollemi National Park
2	Capertee
2	Wallerawang
1	Portland
1	Newnes Plateau

Participants had found their own favourite and special spots to indulge their interests.

- Turon Gates
- Hartley Valley
- South Bowenfels
- Eagle View Escape
- Zigzag Motel
- Eve (great clothes).

I don't generally go to Lithgow for the great dining. That said, Secret Creek is/was great. Dining at Secret Creek Café in Lithgow is/was great. (Vegan Café)
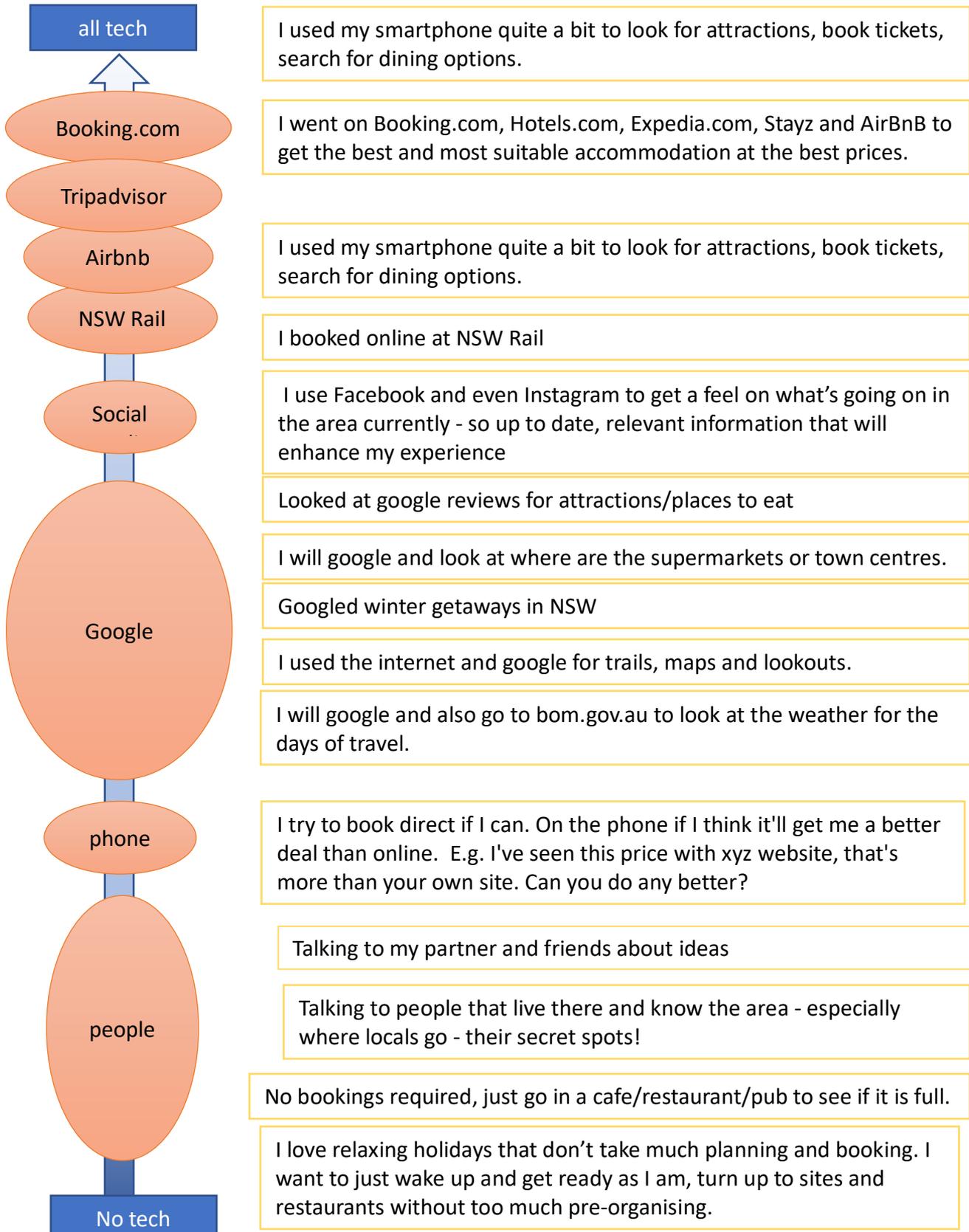

Quick escape

Proximity

Base camp

Authentic

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Information and Booking

Visitors used a wide range of sources for information and bookings, from no tech to all tech – and a combination of both. As other studies have found Google is very dominant source along with recommendations from friends and family.

Source	Quote
all tech	I used my smartphone quite a bit to look for attractions, book tickets, search for dining options.
Booking.com	I went on Booking.com, Hotels.com, Expedia.com, Stayz and AirBnB to get the best and most suitable accommodation at the best prices.
Tripadvisor	
Airbnb	I used my smartphone quite a bit to look for attractions, book tickets, search for dining options.
NSW Rail	I booked online at NSW Rail
Social	I use Facebook and even Instagram to get a feel on what's going on in the area currently - so up to date, relevant information that will enhance my experience
Google	Looked at google reviews for attractions/places to eat
	I will google and look at where are the supermarkets or town centres.
	Googled winter getaways in NSW
	I used the internet and google for trails, maps and lookouts.
	I will google and also go to bom.gov.au to look at the weather for the days of travel.
phone	I try to book direct if I can. On the phone if I think it'll get me a better deal than online. E.g. I've seen this price with xyz website, that's more than your own site. Can you do any better?
people	Talking to my partner and friends about ideas
	Talking to people that live there and know the area - especially where locals go - their secret spots!
	No bookings required, just go in a cafe/restaurant/pub to see if it is full.
No tech	I love relaxing holidays that don't take much planning and booking. I want to just wake up and get ready as I am, turn up to sites and restaurants without too much pre-organising.

Online Forum 2 - Relocating to Lithgow

The web forum was designed as a qualitative research tool to explore the perceptions, attitudes and experiences of residents of Lithgow who have "relocated to the region" in recent years.

Designed as an internet-based focus group, participants entered into a dialogue around their experiences in the destination area and explored their motivations to move there. Participants were sourced and recruited with the support of Lithgow City Council. The forum ran for 3 days and was moderated by DMS staff; with 25 discussion questions and 4000+ words collected.

Participants were:

- 55% working full-time, 27% working part-time, 18% retired

- 54% Gen X, 27% Millennials, 9% Baby Boomer, 9 % Gen Z

- 15% business owner

The results were analysed by Destination Research to further categorise the experiences and motivations for relocation. Through a process of coding and theming, the results were grouped and categorised to show the most common

themes and sub-themes

while highlighting some of the key thoughts and sentiments of participants. The results are presented under the following topics:

- o Key experience themes

- o Reasons to move – drivers and detractors

- o Community and recreational opportunities

- o Perceptions of Lithgow region and suggestions for the future.

Positive perceptions or verbatim comments are presented in light orange shading

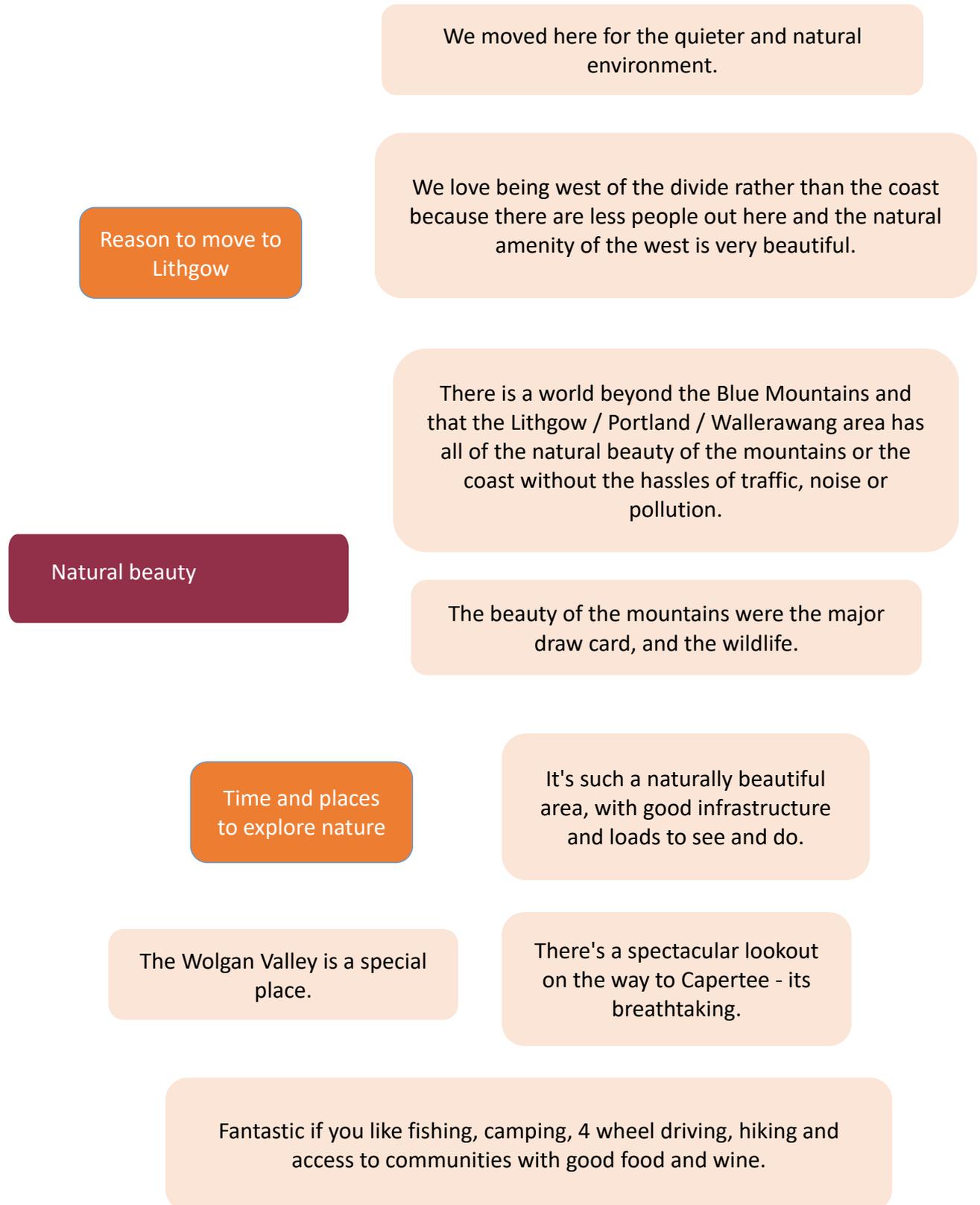Negative perceptions or verbatim comments are presented in grey shading

KEY EXPERIENCE THEMES

Four key experience themes were derived from the data analysis. These themes encapsulate the perceptions and experiences of participants. Each are described further in the following pages along with the comments of participants.

Natural beauty

The beauty of the mountains were the major draw card, and the wildlife

Friendly people

People are very friendly. Much more friendly than in the city

Proximity to Sydney

This is the thing that will see Lithgow change for the better if it can be capitalised on

Affordability

The cost of our property was affordable to us compared to Sydney
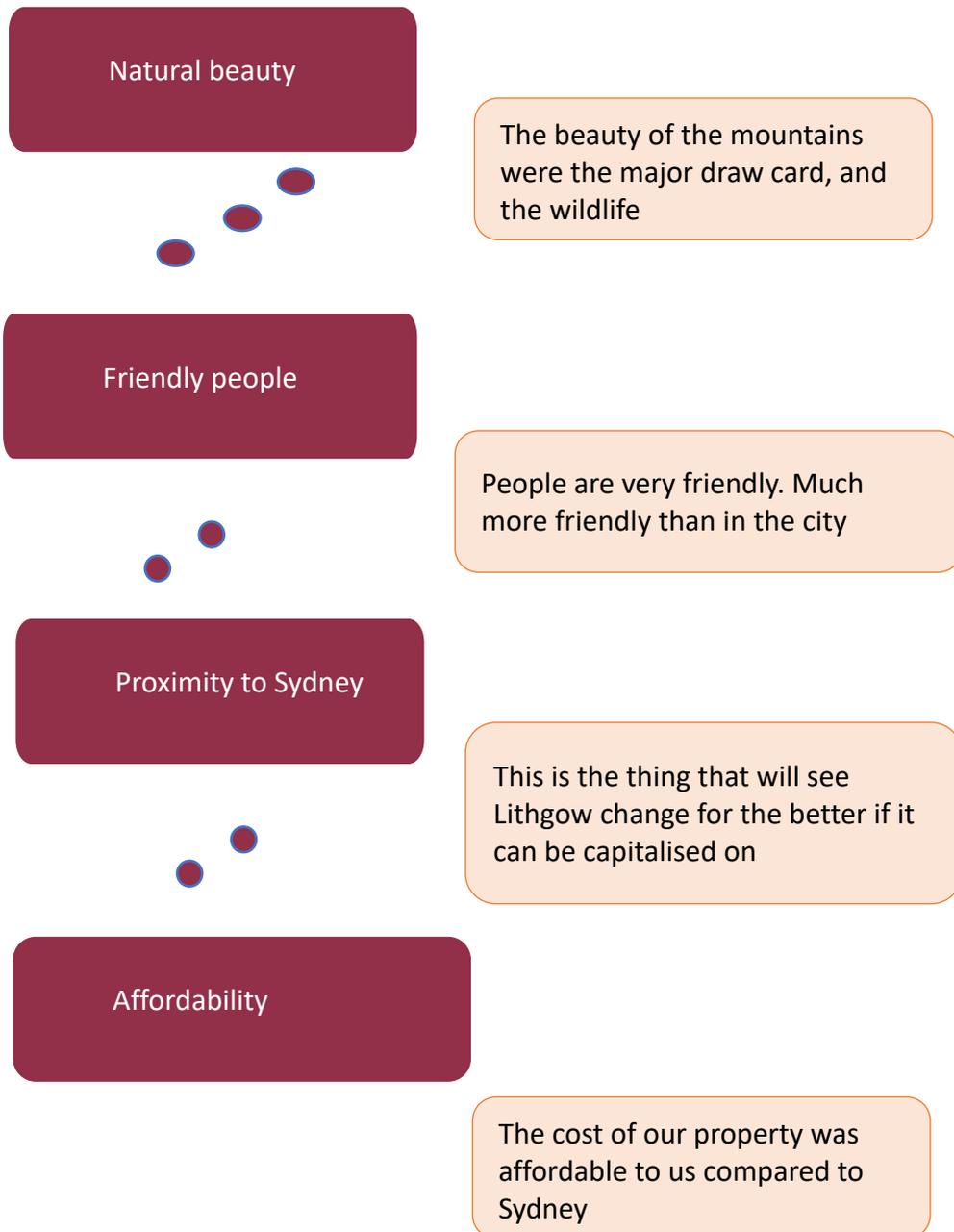
Natural beauty

The natural beauty of the area is both a drawcard to relocate as well as feature of living there.

We moved here for the quieter and natural environment.

Reason to move to Lithgow

We love being west of the divide rather than the coast because there are less people out here and the natural amenity of the west is very beautiful.

There is a world beyond the Blue Mountains and that the Lithgow / Portland / Wallerawang area has all of the natural beauty of the mountains or the coast without the hassles of traffic, noise or pollution.

Natural beauty

The beauty of the mountains were the major draw card, and the wildlife.

Time and places to explore nature

It's such a naturally beautiful area, with good infrastructure and loads to see and do.

The Wolgan Valley is a special place.

There's a spectacular lookout on the way to Capertee - its breathtaking.

Fantastic if you like fishing, camping, 4 wheel driving, hiking and access to communities with good food and wine.

Friendly People

The friendly community has been a welcome surprise to many that has enhanced their experiences and overall impression of the area.

I love it. People are very friendly. Much more friendly than in the city.

Seven Valleys is an area that may be cold but the people are warm.

Friendly people

It still has a lot of that country friendliness. We have met a lot of new friends and acquaintances at the local dog park near the Workies Club.

It is a lovely friendly place.

Fewer people so less queues and the country folk are extremely friendly.

Most people are friendly to newcomers and that there is no shortage of activities or groups to get involved with.

The people are incredibly friendly.

The people are welcoming and friendly.

Proximity to Sydney

Proximity to Sydney and rail/road transport options are **important** aspects to living in the area, both for the residents' work-life and connections to extended family and friends.

Close to family

Proximity

Close to work

Absolutely we travel back to Sydney every week to spend two nights with our grandchildren.

My sister lives in Penrith, and the opportunity to be close to Sydney entertainment is very exciting. My husband and I both work in Bathurst.

Visitors from Sydney can arrive in time for lunch without having to get up at the crack of dawn.

It is close enough to Penrith for our family to visit once in a while. For work it is close for myself. My husband did need o travel to Sydney for work in the past.

It's essential. It meant we could move here. More bullet trains that get to the city faster would be awesome.

I need to access Paramatta by train once a week.

I occasionally have to travel to Sydney for work and it's close enough for a day or overnight conference.

Absolutely, and this is the thing that will see Lithgow change for the better if it can be capitalized on.

Affordability

Lithgow is an affordable option for all respondents for housing and land purchase. Other expenses such as rates and electricity appear to be higher.

> The rent is cheaper than the Hawkesbury for what you get.

Houses and land

> Moved here for more affordable real estate. We were able to buy in the area and have a significantly smaller mortgage than we would have if we bought elsewhere.

> the fact we could afford acres here.

Affordability

> [affordability] was one of the main reasons I came.

> Seriously affordable real estate which is doubly attractive if you're raising kids.

> We have set up a business in Lithgow cause it's more affordable than the big cities.

> The main reason I came was because of property prices. I could afford it here.

> The cost of our property was affordable to us compared to Sydney.

Rates & electricity

> It is an affordable place to live, although the council rates are higher than for my house in Sydney.

> The council rates are pretty horrific.

> Electricity seems more expensive, but many other amenities are cheaper.

Reasons to Move

There were 5 main reasons to move to Lithgow, with no single reason more dominant across the participants. While some found it more affordable, others were drawn by family, or a lifestyle change.

Primary reason	
Affordable	We moved here for more affordable real estate. We were able to buy in the area and have a significantly smaller mortgage than if we bought elsewhere.
	The main reason was because of property prices. I could afford it here
Environment	We moved here for the quieter and natural environment
	We loved the mountains and found ourselves spending more time there. An opportunity came up to buy a heritage listed property
Family	The three of us moved from Victoria to Wallerawang NSW to be closer to my mother - my brother also lives in Lithgow
	Initially, the move was so that I could support an elderly relative living in Portland.
Lifestyle	We wanted a tree change, a simpler life and a large property for our children.
	We wanted to escape the city for a long time
	We moved to Lithgow to give our kids and ourselves a better-quality life.
Work/retire	Planning to retire in Lithgow
	Moved for work
	We moved from Katoomba to Lithgow so that my wife could take up an employment position. This worked for us because I could work from home four days per week.

Secondary Reason	
Affordable	Affordable housing, great connection to the city, and heaps of things to do on the weekend.
Environment	Just the love of the mountains.
	The people are welcoming, friendly, the mountains spectacular, the regular train to the city makes the commute a few days a week very easy.
	There are less people out here and the natural amenity of the west is very beautiful
	We wish to see more of our beautiful country and Lithgow was a cozy suburb in a location that suited us.
Lifestyle	I came to Lithgow originally in response to the Lithgow light festival. I fell in love with the place decided I wanted to move here. I also really love the weather and the cold. Also, the creative community.
Proximity	Lithgow is not too far from the Sydney or country and was within the budget to be able to retire and have funds left to enjoy the later part of our lives.
Work	As I work mostly from home/remotely but I am still able to go into my Sydney office via train or car when needed.
	Business
	We were able to find work in the area in our chosen fields

Drivers and Detractors

While not being the main factors, other elements such as the aesthetics of the area positively influence the decision to move.

We love the cold climate and the sense of space. We enjoy the bush and mountains.

It is a stunning location to live in.

The beauty of the mountains were the major draw card, and the wildlife.

My partner is a dedicated fly-fisher and we both play golf and enjoy bush walking. Coming from Sydney, the 'big sky' is definitely enticing. The Wolgan Valley is absolutely spectacular and it's amazing that so few people know about it.

The country side in the Central West is very attractive - the country towns within driving distance are also very attractive. Lake Lyell and Carcoar Dam are pretty. Carcoar the township is a hidden gem.

It's such a beautiful place. I love looking out over the mountains.

However other aspects of the town have detracted from the experience including empty shops and neglected townscapes.

The main streets of Lithgow and Portland have some beautiful old buildings that are empty and looking neglected.

A quiet low energy country town that is a little tired and needs an injection of design and imagination.

Main Street should be beautified. Flowerpots lights in the trees at night something to encourage locals and tourists to come down this way rather than just go to the shopping centre.

I can only assume rents are not cheap as there are so many shops empty.

Just a stroll down the High street shows how many businesses have closed down from cafes to souvenir shops it's a real shame.

The town is pretty in parts with its old buildings, but the empty shops really let it down.

It also seems that most businesses are closed on a Saturday - the main street could do with some invigoration on a Saturday.

We were really looking forward to frequenting the 7 Valleys pub, it's a shame it closed.

It's a great town to raise kids but something needs to be done with all the drug addicts.

There are so many closed businesses in Lithgow which seem like a bad sign to me.

Rubbish in car parks and Lithgow town centre always feels a bit dead.

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It's good here – but …

When asked for their "overall impression of Lithgow" most had a positive impression, followed by a qualifying response. The secondary negative impressions were based around a lack of activities for kids and adults, and concerns about the culture/people in the city.

	What has been your overall impression of Lithgow and the region so far?
Activities	It's ok, but coming from a bigger rural town, I'm struggling to find things to do.
	Good, however there are some parts of the town that we stay away from.
	There are some beautiful areas around Lithgow to visit, Bathurst is nice and close for major shopping trips, Lithgow itself does at times feel a bit limiting in what it provides.
	The people are incredibly friendly, but it is quiet. I'm a little disappointed that people hide in the winter and don't come out.
	It has very minimal indoor activities for children which we find difficult to manage at times having 3 young boys.
Environment	It's overall been good but disappointed with the air quality in winter with so much wood and coal home fireplace burning - this for our family distracts from the attractiveness of Lithgow as a place to live, work and raise a family.
	Lithgow as a town is quite sad. So many shops closed down, for lease or empty. It clearly was a vibrant town center at some stage but today it's quite a depressing place.
People	I love it here - but it could be a little more welcoming. The area is beautiful.
	There are lots of people actively trying to invigorate the community and get over the unfortunate and undeserved reputation of a dirty mining town whose best days are behind it but there seems to be a very vocal minority who seem to enjoy being miserable and negative and do nothing other than whinge about the council or anyone else who sticks their head above the parapet.
	Outside Lithgow is lovely, Lithgow town itself is fine but the culture/people seem pretty stagnant/bogan... Honestly Lithgow is ripe for gentrification, has been for decades. Its been skipped over as places like orange, Bathurst and such have become more upmarket. They all still have their bad elements, but they aren't characterized by them like Lithgow is.
	It's a great town to raise kids but something needs to be done with all the drug addicts, troublemakers etc., that wondering the streets.

Recreational Opportunities

Participants felt positively about the variety of opportunities for recreation, mainly outdoors in nature, with suggestions that more indoor activities were needed.

They also had found favourite food places – while feeling this could also be improved.

> We love the Fast Fox, Tin Shed, Blue Fox, 128 Cafe, HomeTown cafe and more recently The Cafe at the Pottery Kiln - all in Lithgow. The Portland Golf Club

> We enjoy Lithgow Workers club for a quick coffee and light lunch

> It's a foodies delight if you know where to look - the Thursday Gang Gang Market, Jannai Dairy, High ground Harvest, Lithgow Mushrooms, Truffles or foraging in the forests for pine mushrooms

> We like the Tin Shed and Wallerawang bakery. The Esk is lovely, as is Frankies.

> The Indian on main street is great, the kebab shop in the mall is great. Both of these have two common elements - nice people and good food. As far as a nice restaurant for a sit down meal I'm not really aware of anything, we end up going to the workies for a family meal

Community Services

One area which receives a very positive response was for community services, with only a couple of negative responses.

Community Services

The community nurses are good

Very good but somewhat disjointed and not advertised adequately.

Good with day care facilities, schools, library, tourist information, facilities for aged care, Centrelink, and a hospital.

The hospital is very good and has a good reputation.
- by far the best doctor I have ever had.

Amazing. There seems to be lots

I used to work in that field, so I know funding is always hard for rural services, but they do their best with what they have

There are a lot of community services such as aged care facilities and Employment services as well as other disability agencies.

The bulk billing medical service is excellent and a must for a town where there are people without the resources to attend a non-bulk billed medical service

The library is great

Helpful volunteers at the state mine museum and others like Eskbank house

I work with young people who are getting into trouble, and there are very limited services in Lithgow for them

Good although It was hard to get into a daycare as the daycare services couldn't fill staff vacancies

Perceptions of Lithgow as a coal mining town

There was an overall feeling that the time is right to move forward from the image of Lithgow as a coal mining town, to a new and fresh image based on nature-based activities and cultural alignment.

> The Wiradjuri stories and culture is fascinating and needs to be front and center of any thinking about repositioning the perception of Lithgow

> Coal is a divisive material right now. So is uranium! It would be good to reflect on Lithgow's history and to think about a new alignment away from coal and towards nature-based activities

> I feel that we can celebrate this history but need to stop being pulled back into this past - yes this and still is a coal mining town but it's far too overplayed in terms of economic benefit - we need fresh and younger energy in this place

> People are very proud of the heritage, though I would like to see it redefine itself. The good things from that industry (comradery, work ethic etc.) can be brought with the community into a new future that is literally brighter

> Sadly the only time Lithgow gets attention is for coal, waste to energy or nuclear. Would be great to be for mountain biking, the gardens of stone, the Newnes cabins, all of the amazing and wonderful environmentally sustainable options we actually have.

> We have experienced a real divide in the locals we have met between those that want to cling to coal (which is understandable because no one likes uncertainty) and those that want to forge ahead on different paths

> There are lots of people actively trying to invigorate the community and get over the unfortunate and undeserved reputation of a dirty mining town

Seven Valleys Marketing

Most participants recognised the Seven Valleys promotional identity, while three respondents had not seen it. Exposure to, and perceptions of, the branding were limited.

Seven Valleys
Yes. When the Marketing campaign was announced.
Yes. I became aware of it through social media in about 2022.
Yes, I saw it on a billboard driving to Lithgow on the Great Western Highway.
Yes - when we moved here we were hearing the name regularly
We weren't aware of the name until we moved here
We think Seven Valleys needs a a bushwalk guidebook in simple format like the Blue Mountains Best bushwalks as there are so many beautiful walks but it seems only a few are actually known or signposted.
Somewhat - I first noticed it was a pub name in the Main Street of Lithgow. I don't think the seven valleys is recognised by our family or others as know to have anything to do with Lithgow.
On the radio
I have seen that term on a billboard driving from Bathurst to Wallerawang but do not understand it's meaning at this time.
I first read about seven Valleys when I picked up literature from the Lithgow tourist office.
I first learnt of this name well after moving to Lithgow. It is potentially a very strong branding idea similar to Snowy Valleys around Tumut.
I believe that Lithgow has some fantastic themes that it can draw from to develop its own sense of place, such as its industrial history and it has a wonderful Wiradjuri heritage and stories that I think must be central to any discussions about Lithgow's identity.
Get rid of "The Seven Valleys" as the tag line for the region - it's too diffuse and not even the lifelong locals can name them all.

Suggestions and Improvements

Participants made comment on areas of infrastructure, business services and beautification that could be improved to entice more relocators.

Infrastructure

The roads are pretty bad due to the pot-holes

The digital infrastructure is not great, we can only get 4G in Portland

The roads are in very poor condition

Planning

Have a plan for Lithgow. The development of a Lithgow plan should take some time and be led by town planners, with creative people, architects and landscape architects, environmentalists, politicians, residents, businesses and others

fast track business applications and treat them favourably

having a supporting person people can actually talk to in council who s solution focused would be amazing

Beautification

let's get artists to beautify more infrastructure around here! It will draw tourists

I think more thought needs to go into making Lithgow more attractive by improved street scaping, addition of trees and gardens (garden competitions?)

Business services

Offer to do potential marketing for the small businesses

Services for those who work from home

Incentives

maybe a break on rates for small business owners, fast tracking of approvals related to business

Perhaps even a council service that gets new residence together or new businesses together on a bus trip to take them to the significant sites, in one day. This would be really great so that I had a better idea of what to tell people when they're coming into the shop from other regions

Seven Valleys Brand Strategy & Marketing Plan - Situation Analysis

Best Experiences

Participants were asked to identify the best experiences they have had since moving to the area. The main themes related to nature, arts/culture and heritage as well as family time.

	What experiences have you enjoyed most in the Lithgow region
Arts/culture	The Silos at Portland are beautiful
	I loved learning about the indigenous culture here - though I had to really search for it myself. That should be easier for people.
	Portland foundations markets are brilliant, Hartley is quite cute
	Ironfest in Portland
	Some great cafes in Lithgow.
Family	Family days out
Heritage	I love steam trains so introducing my son to them has been a wonderful experience
	I love the blast furnace
	Scenery is very nice, and towns like Portland have a quaint feel, Lithgow also with all its old cottages is pleasant.
Nature	We loved camping at Capertee.
	The natural environment. The wildlife and fresh air. The helpful volunteers at the state mine museum and others like Eskbank house.
	The lack of crowds in the national parks; open gardens in Hartley;
	BBQ lunch at the Marangaroo Camping Ground
	The lookout above Lithgow at the Gardens of Stone NP

HIGH-LEVEL INSIGHTS FROM THE ONLINE FORUMS

Below are some high-level insights from the forums. This list is not meant to be exhaustive, and simply reflects some key elements which we believe should be carried forward to inform the development of the brand strategy.

- There is a clear preference for the region for visitors and relocators over the Blue Mountains due to things such as:
  - Remoteness
  - Quietness and less crowded
  - More authentic and less touristy
  - Affordability
  - Sense of freedom
- Experiences are a leading factor for people coming to the destination and for relocators, with things such as the ZigZag Railway and the Glowworm tunnels. Interestingly, for the visitors unique accommodation was also a key driver for decision making, particularly those that can offer that sense of remoteness and connection to nature.
- Overall, there is a positive sentiment towards the region and the friendliness of the community. Many people have returned more than once and visiting friends and family is another important motivator.
- Proximity and connectivity to Sydney is incredibly important. Lithgow is seen as a great opportunity to 'get away from work and city life' and is very accessible for weekends away from Sydney. For relocators, it is also great because they can live the life they want to live while still being close to family and friends in the city.
- There is a lot of potential for the region when it comes to tourism, and although some places are quite dated (including Lithgow Main Street), there is a quaintness and old town charm. It is also a great base camp for exploring the surrounding regions whether you are a visitor or relocator.
- Connection to the natural environment is extremely important for the community and visitors.
- It's very affordable to live and visit and allows you to live a life that is aligned with your values.
- There is pride in the industrial heritage of the region, and weaving this into the future direction will be important.
- Perceptions of the Lithgow region and boundaries are blurred, with participants not necessarily connecting Lithgow City with the surrounding towns, villages and experiences of the region. This highlights the necessity for an overarching place brand like 'Seven Valleys', and the role marketing and communications has to play in telling the stories of these places.

3. COMPETITOR ANALYSIS

BRAND COMPARISONS AND POSITIONING

Even though the purpose of this project is to create a place brand for the Seven Valleys, the competitor set below are destination brands. However, one could argue that each of the destinations could utilise their destination brands as a place brand.

The competitor set helps to identify where the gap is in the marketplace.

| Competitor	Target Audience	Brand Strategy	Positioning/ Brand idea	Observation
Blue Mountains	The DMP and the Brand Guidelines don't identify any specific target audiences other than they seek to extend length of stay, spend and take advantage of the development of Western Sydney.	The strategy relates to the attributes of the region. It reflects that the Blue Mountains is not about its summits, but is about the valleys and the escarpment.	***Run Deep*** This is the idea that the region is deep in experiences, deep in the mysticism of the valleys and that the people are not shallow but rather divers with a variety of interests, and that there is a depth of experiences on offer. ***Run Deep*** could also apply to the feelings that a visitor has while in the BM as well.	As with most destinations, Blue Mountains has focused on the attributes (i.e. it's about the valleys and a depth of the valleys - which is play on words that there is a depth of experience offering in the Blue Mountains). This proposition is to encourage length of stay and greater spend because of the depth of the experiences on offer.
Mudgee	Millennials and 55+ food and drink market. All the marketing and social media activities have the millennial market at the centre of their campaigns. However, the	Brand strategy insight is that a key motivation of the market is to spend time with loved ones and friends to reset. To engage with	***Reset your Senses*** Is a human-centred idea and not about the destination. The experiences on offer are what reset the senses. The brand also identifies as a Carl Jung lover	The Mudgee brand strategy has been developed based on understanding the key motivation of the target audiences. That is taking a short break to take

Competitor	Target Audience	Brand Strategy	Positioning/ Brand idea	Observation
	biggest market travelling to the region is the 55+ market. As the marketing resonates with this markets values and interest as well.	what's important to them. To take time out and engage your senses through the Mudgee experiences, to refill your cup with great food, drink and nature-based experiences while spending time with the people you love.	archetype. Spending time with family, friends, indulging in the experiences that transform the visitor from the everyday to something that engages this feeling of love and completeness is what the love archetype delivers.	time to reset your senses and to be revitalised. The campaign brought the brand to life by encouraging the target audience to ***Skip Town Together to Reset your Senses***
Bathurst	Roy Morgans Leading Lifestyle market. They are generally older 50+. They are interested in history, culture, arts, food and wine.	The brand strategy is more attribute focused, but it is positioned as a destination that attracts a market interested in education, culture, the arts and more of a sophisticated country experience. It is a place of first that is constantly evolving and learning. It also is attractive to a higher-valued visitor.	***Step Beyond*** *is* what is known about Bathurst - beyond a car race and into more culture, villages and country sophistication, and the arts. Bathurst is highbrow. The Carl Jung archetype was the Creator from arts to car innovation. Even the car race attracts a different crowd. The set up at Mount Panorama can be utilised all year-round by other target audiences.	Step Beyond was a way for Bathurst to demonstrate it was more than a car race or a historical town. But a place for those who wanted a rural get away that offered diversity without calling it that. The Council never implemented the brand other than to build a new website and to use the logo.

Competitor	Target Audience	Brand Strategy	Positioning/ Brand idea	Observation
Upper Hunter Country	55+ market looking for a touring experience (based on the design of the website, content and social media posts and followers).	There does not appear to be a brand strategy as such with an identified brand archetype or positioning in the market. However, there is a sense of an invitation to ask potential visitors to come on up and visit.	*Come On Up*. Is invitational but is not tapping into a target audience insight or motivation. *Come On Up* could infer leaving behind the everyday and being invited to visit the country. There does not appear to have been any campaigns to invite visitors to the region	On the surface it seems that there has been a logo and tagline created without a brand strategy or a campaign put in place.

THE GAP

The opportunity for Seven Valleys is to be more focused and to be singular in the idea of the region that the brand can represent This means identifying one clear positioning, and a brand archetype combined with a brand personality and values. This will set the framework for developing a single brand idea.

Below is a diagram that lays out some of the destination brands by archetype. A destination such as Sunshine Coast very much shows up as a regular person archetype. However, Noosa is in the Sunshine Coast LGA. Noosa has its own website, brand and brand story because the experience and product offering is completely different to the Sunshine Coast. For example, Sunshine Coast is Toyota and Noosa is Lexus. They need completely different treatments and brand.
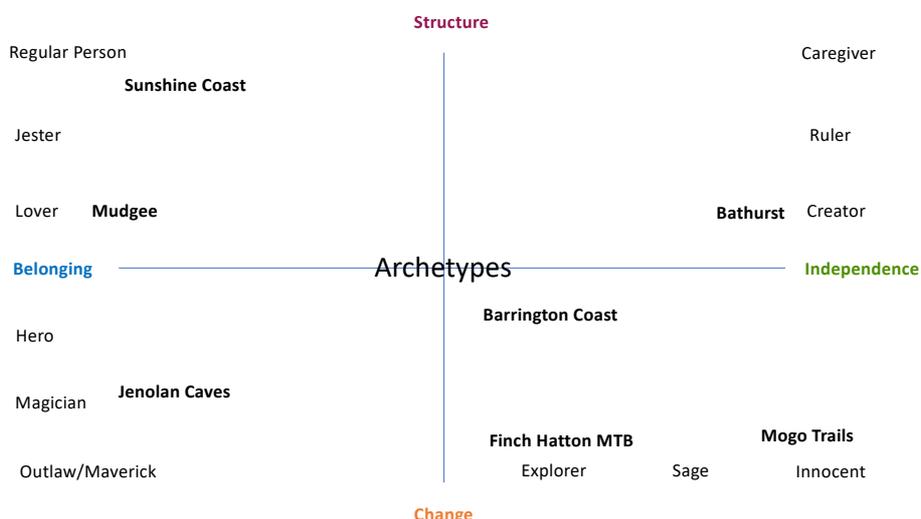
DIGITAL MARKETING SNAPSHOT

Competitive Landscape

	Seven Valleys	Visit Bathurst	Mudgee Region	Blue Mountains	Upper Hunter Country
Website					
Visits:	3.2k	12.4k	28.2k	8.2k	1.4k
Bounce rate:	57%	51%	63%	74%	36%
Av. Visit duration	22s	46s	37s	32s	37s
Facebook					
Page Likes:	9,437	18,286	27,775	16,921	4,244
Posts: *Industry benchmark: 13.6*	1	86	25	12	1
Engagements:	4	1,800	984	98	1
Engagements Per Post:	4	20.9	39.4	8.17	1
Engagement Rate: *Industry benchmark: 0.09%*	0.04%	0.11%	0.14%	0.05%	0.02%
Instagram					
Followers:	2,626	6,489	23,768	9,530	2,659
Posts: *Industry benchmark: 14*	0	14	25	5	0
Engagements:	0	152	2,742	112	0
Engagements Per Post:	0	9.79	110	22.4	0
Engagement Rate: *Industry benchmark: 0.46%*	0%	0.15%	0.46%	0.24%	0%
YouTube					
Subscribers:	5	232	-	-	11
TikTok					
Followers:	-	-	152	-	1

Data listed for competitors in the table above is from July 2024.
Sources: Similarweb & RivalIQ

Outtakes:
- Small audiences across Facebook and Instagram – growth potential
- Social media audience engagement levels hard to gauge with minimal posting in the last 30 days
- Audience engagement of competitor set not performing overly well apart from Mudgee (Instagram)
- Website bounce rate is lower than competitors, however site duration is low

Opportunities for enhanced performance
- Inconsistent posting frequency – Increase post frequency to 15-20/month to:
  - Maintain and increase audience engagement,
  - Signal an active presence to the platform and its algorithm
  - Improve SEO/Google Search ranking
- High quality User Generated Content (UGC) not being utilised (see images below). A proactive approach to sourcing UGC through destination geotags is recommended. Sourcing permissions from creators for UGC use across other digital media such as website is recommended to reduce content spend.

- There is limited use of Reels (vertical video) on Instagram and Facebook. Mudgee's high engagement rate on Instagram can be attributed to its use of high-quality Reel content.
- Implement a consistent #hashtag and @tagging strategy to increase discoverability. See further explanation about # and @ strategy below.
- Limited audience migration tactics have been implemented. An example of this would be to encourage your Facebook audience to follow your Instagram and vice versa.

Look & Feel + Content Themes
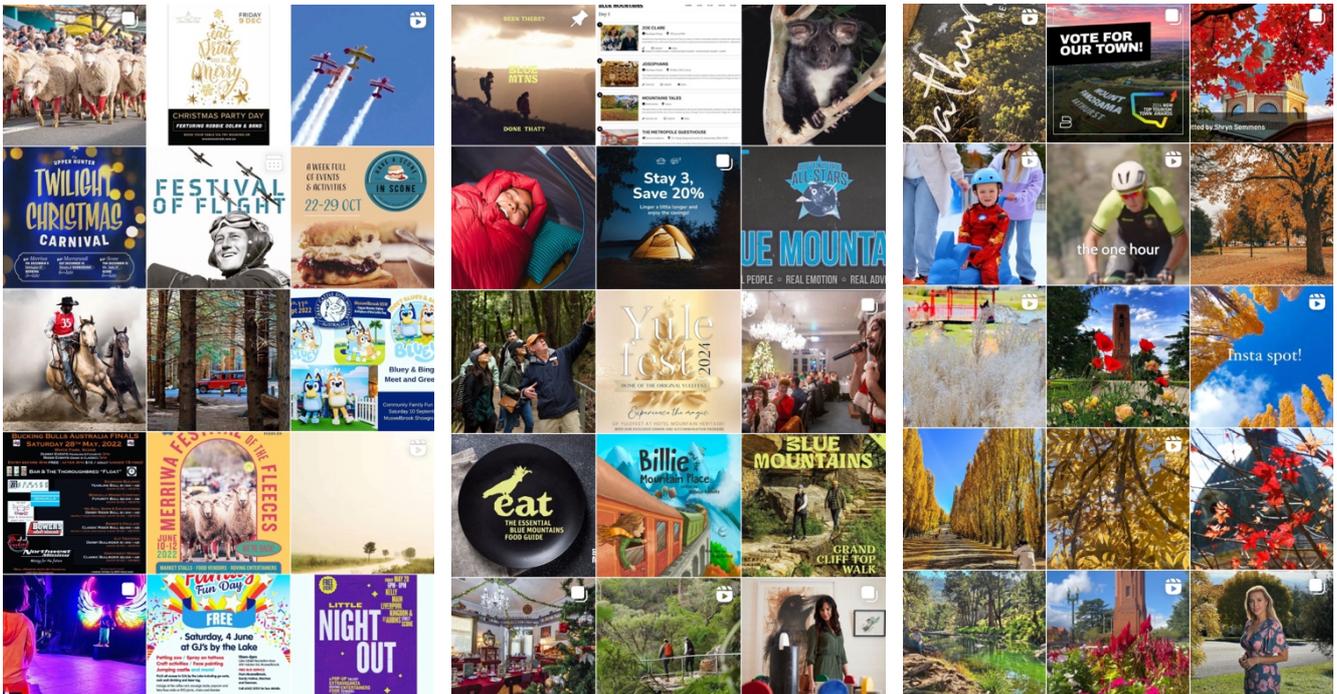
UPPER HUNTER COUNTRY

- Text heavy graphics
- Minimal visitor experience content
- No user generated content

BLUE MOUNTAINS

- Text heavy graphics
- Minimal visitor experience content
- Positive: post type variation (carousels and reels)

BATHURST

- Minimal visitor experience content
- Landscape/attribute dominant
- Positive: post type variation (carousels and reels)

← MUDGEE REGION

- Clear positioning and theme ie food and wine
- Visitor experience content prioritised
- High usage of carousel/multi image content

SEVEN VALLEYS →

- Text heavy graphics
- Being used as a 'Noticeboard' instead of a marketing channel
- Limited used of user generated content
- No clear positioning or theme

4. LEADING GLOBAL & DOMESTIC TRENDS

As identified in the Seven Valleys DAP, there are several global and domestic trends that are key to understanding consumer preferences, motivations & barriers to travel. However, it important to note that these trends are not only about the visitor, but also about how to create vibrant and thriving communities where people want to live.

These trends have been drawn from a wide range of sources, including but not limited to SKIFT Research, Euromonitor International, Booking.com, Deloitte Access Economics and Tourism Australia's Consumer Demand Project (CDP).

Experiential Trends Influencing Travel		
Sustainability & Green Travel	Indigenous Tourism	Transformative Experiences
Culinary Tourism (food & drink, agritourism)	Value of Events	The growing importance of local communities

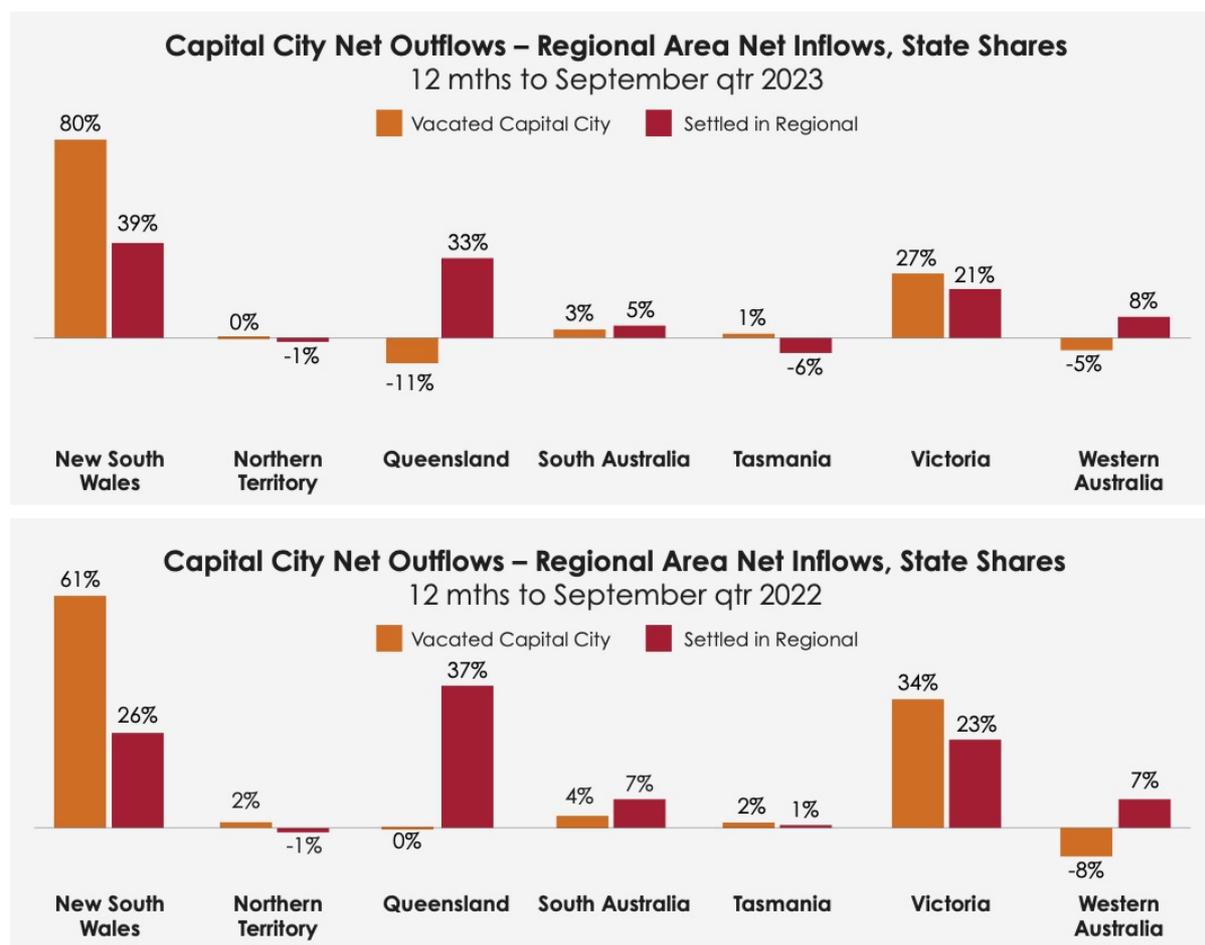| Enabling Trends Influencing Travel			
Accessibility	Working from Anywhere	Technology & Digital Transformation	Pet-friendly

The above trends are all important when building successful tourism destinations. However, the four coloured trends provide a focus for The Seven Valleys to strengthen the local and visitor economy.

We know that relocators are often visitors first, so by doing things such as encouraging experience development and enhancement of products and services, (including accommodation), the Seven Valleys will have a lasting impression on visitors and will ideally convert these visitors into relocators down the track.

These trends will be considered when developing the Place Brand and will play a significant role when it comes to developing the Marketing Plan and how key messages are delivered to the consumers.

NATIONAL RELOCATOR TRENDS

Capital City Net Outflows – Regional Area Net Inflows, State Shares
12 mths to September qtr 2023

Capital City Net Outflows – Regional Area Net Inflows, State Shares
12 mths to September qtr 2022

Source: Commonwealth Australia and Regional Australia Institute

Motivations for moving:

- **Lifestyle:** Desire for a calmer pace of life and closer connection to nature
- **Financial:** Lower housing costs and the ability to afford larger homes with gardens
- **Work-Life Balance:** Reduced stress from commuting and the possibility of remote work
- **Community:** Stronger sense of community and better quality of life

Who is Relocating?

- **Millennials:** Leading the trend, with many aged 25-39 moving to regional areas.
- **Reasons:** Affordable housing, better job opportunities, and lifestyle benefits.

Key Insights to attracting Visitors & Relocators

- Focus on the Millennial and Gen X target markets – find their common values and motivations
- Focus on the lead experiences related to the great outdoors, nature and the social aspects. Make heritage engaging and fun through activations and events
- Develop a brand that captures the hearts and minds of this market by finding the emotional territory and brand values

5.CONSULTATION & ENGAGEMENT INSIGHTS

In August 2024, three industry workshops were help across the Lithgow region in Lithgow City, Wallerawang and Capertee Valley. In addition, a small group meeting was held with local Wiradjuri elders.

In the workshops we explored what a brand is and its role, we looked at case studies of destinations that have done branding well – standing out in a sea of sameness and also looked at global trends and research. Participants were asked to take part in a number of activities including creating brand personas, identifying place brand values as well as choosing brand personalities.

Below is a snapshot of the engagement insights.

RELOCATOR PERSONAS

Below are the relocator persona's created by participants:

Dan and Danni	**Sam and Sam**
• 39 and 37 years of age • From the Inner West of Sydney – own an apartment in an art deco old building • Corporate Jobs that they can freelance • Flexible working arrangements • Not married • Connection to the region – one of them grew up in Lithgow • Healthy, active – tri-athletes, weekend competitors • Friends are similar in interest • Considering starting a family • Have a dog – mix terrier, rescue, Beau • Schools and big backyard are important • Not too far from Sydney so that friends can visit	• 30 – 45 years old • Architect and Maths Teacher • 2 children – 3yrs and 6yrs • Want a dog • Work flexibly • Have lots of school holidays • Love coffee and need good cafes • Interested in designing a sustainable home – solar and passive • Love outdoors and exploring • Accessibility to Sydney is important to maintain contact with friends and family • House with a pool would be ideal • Looking for a large block, spacious home with room for visitors • Child care affordability is also important
Pete and Sally	**Matt and Steph**
• Millennials • Coder & Social Media Marketer • Live together but are not married • Like dining out, biking, canoes, bushwalking • Sick of suburbia and big mortgage • Enjoy unstructured travel	• Late 20's - mid 30's • Already had local connections • Young family • Bought and built house • $150K+ combined wage • Love weekend family activities – going to lake and being outside

Chloe and Jackie	Jack and Taylor
• 30 – 35 years old • Relationship but not married • Have lived in Sydney and other cities • Salary for both is mid $100Ks • Would like a family • Like 4WD, bush walking, sport, pubs, music • Interested in good value and Instagramable moments • Friends with other young families • Want to live somewhere less crowded and with new industry opportunities	• 25 – 35 years old • Live in Sydney • Enjoy good coffee, food and dine out regularly • Travel for: family reunions, sporting events, music festivals, a good photo moment, a good view or an experience • Have a 4WD that can be loaded up with bikes, tents etc. • Health conscious and go to the gym • Love the outdoors and exploring places off the beaten track • Love to be able to get away from the city easily

VISITOR PERSONAS

Below are the visitor persona's created by participants:

Bruce and Gemma	Thomas and Martha
• 44 – 59 years old • Married • Live in Nowra • Ex-Army and Manage Glamping business in Huskisson • 1 year old child – Gemma is a stay at home mum at the moment • $100K-$150K salary • Enjoy out of the way places and exploring • Drive a 4WD and a 4WD caravan • Have friends of similar age and interests • Value family, staying connected with friends, nature, learning • Like pubs and live events • Looking for the right climate and location to settle down	• 31 and 30 • Married • Want 7 children • $300K combined salary • Very active, bush walking, cycling, camping and travelling • No close family • Wanting to relocate to start a family and build a large home • Dedicated, strong and passionate • Want to get out of the rat race in Sydney, avoid traffic and the high cost of living • Rail connection is important • Value balance, the outdoors, community

Aliah and Mark	John and Sally
- Millennial/ GenX - In a relationship but not married - Come from Greater Sydney - Have a 4WD - Corporate and Tradie jobs - Both ear over $100K - Have like-minded friends - Are open-minded explorers, enjoy making memories, entertaining people and free time. - Want to escape, connect with family, unplug and have a digital detox	32 and 30 - Live in Penrith - Computer programmer and nurse - Engaged and looking to be married - Enjoy nature, walking, camping, bike riding and getting away from the city - Enjoy spending time together and travel before settling down – maybe looking at settling where they can buy more for their money e.g. backyard, family oriented - Have close and similar friend groups/couples who they want o visit
Kath and Andrew	**Mick and Karen**
- Gen X - Work in finance - Semi-retired – work part time from home 2 adult children living at home who go to university - Live in Wollongong - Own 2 houses in Grafton and spend part of the year there - Lots of disposable income - Love nature and bushwalking - Own a Volkswagen which they make into a campervan so they can stay anywhere - Love heritage architecture, art, museums - Very eco - Active hearts active minds - Like eating out - Enjoy getting involved in community projects - Don't like commercialism and putting a new face on history - Lots of long term friends who are diverse - Love the cute little miners cottages in Lithgow and the Heritage Sites	- Millennials 2 kids – 10 and 14 years old $200K combined salary - Tradie and Tech Consultant - Own a 4WD - Live in Western Sydney - Socially conscious - Don't like traffic and commuting - Happy to pay for quality - Like green open spaces - Family and making memories together is important - Parents don't want kids to play on screens - Want to be involved in nature and learn about it - They are time-poor and have a lot of responsibilities - Being close to Sydney is important - Kids need attractions they are interested in

PLACE BRAND VALUES

Participants were asked, "what are the core values – functional or emotional upon which the audiences' relationships with this brand is founded?"

The below word cloud captures the core values that were identified.

The top 5 values: identified were:
1. Community
2. Nature/Environment
3. Connection
4. Authenticity/Realness
5. Heritage/Culture

Of course, these top 5 values are critically important however, when we dig a little bit deeper & begin to unpack the next top 5 values, we start seeing some of the unique values which are more emotional, and that will help to bring the brand to life and stand out in a crowd. These are:

1. **Freedom/Space** - Themes related to "space and freedom," "being far away from crowds," and "freedom."
2. **Safety/Security** - Referenced in terms like "feeling secure and safe for all ages," "safe natural environment," and "secure."
3. **Adventure/Exploration** - Includes values like "adventure," "sense of discovery," and "expanding your comfort zone."
4. **Welcoming/Friendliness** - Highlighted in phrases such as "friendly," "open welcome arms from locals," and "inviting family and friends."
5. **Healthy Lifestyle/Well-being** - Mentioned through concepts like "healthy people and community," "wholesome," and "relaxed."

BRAND PERSONALITY

With the above values in mind, some participants were then asked, "if your destination was a person, who would it be and what personality traits would it have?

Here's what they came up with:

Keanu Reeves	Jane Goodall
• Rough around the edges • Authentic • Understated • Passionate • Has heart and soul	• Cares for future existence • Acknowledges people and nature • Not pretentious • Quiet achiever • Stands up for nature • Not fake • Understands the need for earth and people to work hard to preserve earth
Sam Neil	**Margot Robbie**
• Conscientious about environment • Loves life and the people in his life • Grassroots – farming, vineyards • Business minded • Authentic • High achiever with high standards	• Independence • Great personality • Vision • Drive • Age • Attitude • Happiness
Young Indiana Jones	
• History • Adventure • Risk taker • Life experience • Connection to past • Hero • Explorer • Educator • Well-liked • Tight group of friends	

Other participants were asked, "if your destinations was a car, what would it be?"

4WD Ford Ranger	Land Rover Defender 110
• Charcoal • Roof racks • Unopened awning on the side • Bulbar • No canopy, just tray cover – need to just throw things in • Like the idea of going off road – feel guilty that they don't go 4WDing more often, but like to know it's there if you want it • Fits lots of people • Trendy	• Khaki green • Simple • Tough • Recognisable • 4 door family oriented • 4x4 can trek anywhere • Heritage of adventure
VW Kombi	**Toyota Hilux**
• Rare • Attainable • Family fun • Has value • Adventurous • Versatile	• Twin cab tub • Canopy • Black • Diesel • Personalised number plate
Other cars mentioned: • Ute – 4 cab • Subaru • Skoda – people don't know much about the car but it is top quality	

WIRADJURI CONSULTATION

A small group meeting was held with two representatives from Mingaan Wiradjuri Aboriginal Corporation.

We explored the possibilities of local traditional owners providing a name for the Seven Valleys in Wiradjuri language, as well as connecting the brand to Wiradjuri culture through the use of visual cues and stories of local totems such as the platypus.

It was agreed that further consultation between Lithgow City Council and local Wiradjuri representatives would take place to begin the process of identifying an appropriate name for the Seven Valleys in Wiradjuri language.

6.CONCLUDING COMMENTS & NEXT STEPS

This Situation Analysis highlights the distinctive appeal of Lithgow and the surrounding region to both visitors and relocators, highlighting things such as remoteness, affordability, outdoor experiences and connection to nature. The area's potential for tourism, combined with its rich industrial heritage and proximity to Sydney, offers a compelling narrative for future marketing plan development.

As stated in the key outtakes from the online forums, perceptions of the Lithgow region and boundaries are blurred, with participants not necessarily connecting Lithgow City with the surrounding towns, villages and experiences of the region. This highlights the necessity for an overarching place brand like 'Seven Valleys', and the role marketing and communications must play in telling the stories of these places.

We also know from prior research in the DAP that Millennials and Gen X are the primary source markets for the region. Narrowing the focus on Millennials will be important for attracting both visitors and relocators to the region – noting that this does not mean other demographics will not be enticed and welcome.

Moving forward, these elements should be central in shaping the region's identity, ensuring that its charm, authenticity, and community spirit continue to attract and inspire.

Next steps:

This Situation Analysis will be used to inform the Place Brand Strategy and the Marketing Plan.