

ATTACHMENT

4.

Southern Cross University

Lismore Business Promotion Review – Final Report

Lismore Business Promotion Program Review

Final Report

February 2013

Prepared by

Dr Peter Vitartas and

Ms Sarah Biersteker

Southern Cross Business School

Southern Cross University

This research report was prepared by the Southern Cross Business School at Southern Cross University for Lismore City Council and the Lismore Business Promotion Panel.

Acknowledgements: The authors would like to acknowledge the assistance of Mr Ben Roche and Ms Kristen Den Exter, from SCU's Community Engagement Office, Lismore City Centre Manager Ms Katie O'Rourke and all the members of the Lismore Business Promotion Panel for their involvement and assistance in the project. They would also like to acknowledge Ms Saskia Leinius for her assistance in data collection and report development and finally all the business owners or operators and public who provided feedback to the surveys and information gathering undertaken as part of this project.

Copyright: © 2013 Southern Cross Business School, Southern Cross University, Military Road Lismore NSW, Australia.

Disclaimer: While every care has been taken in the preparation of this document to ensure accuracy and reliability, no responsibility will be accepted for errors or omissions. Southern Cross University shall not be liable for any damage or loss resulting from the use of the information in this document.

Table of Contents

Notes and Abbreviations	x
1. Executive Summary	1
2. Summary of Ideas arising from the Study	8
3. Introduction	9
4. Project Overview	10
5. Revitalising Towns	11
5.1. Town Centre Management	12
5.2. Business Improvement Districts (BIDs)	12
5.3. Stakeholder Partnerships	13
5.4. Lismore City Model	15
5.5. LBP Program and role of Lismore Chamber of Commerce	16
6. Results from the Study	17
6.1. Written Submissions	17
6.2. The LBP Panel and its Business Marketing Plan	17
6.3. 'Come to the Heart' Branding	18
6.4. Special Business Rate Variation Levy	18
6.5. City Centre Manager and LBP Panel members	18
6.6. Lismore Services, Streets and Facilities	19
6.7. Events	20
6.8. Future	21
7. Interviews with LBP Panel Members	22
7.1. City Centre Manager (CCM)	22
7.2. LBP Panel	23
7.3. Problematic Areas	23

8.	In-depth Interviews with Business Operators.....	24
8.1.	The LBP Panel.....	24
8.2.	Lismore City Centre Manager	25
8.3.	The Lismore Chamber of Commerce	25
8.4.	The ‘Lismore-come to the heart’ brand.....	26
8.5.	The Special Business Rate Variation Levy	26
8.6.	Issues facing Lismore as a regional centre.....	27
8.7.	Lismore in the future	28
9.	Community Survey Results.....	29
9.1.	Perceptions of Lismore as a place to visit.....	29
9.2.	Perceptions of Lismore’s CBD as a shopping and service centre.....	31
9.3.	Perception of Lismore’s CBD public spaces	32
9.4.	Overall satisfaction with the Lismore CBD.....	33
9.5.	Perceptions of improvement in the CBD over the past 2 years	34
9.6.	Awareness and attendance at LBP Program activities and events.....	35
9.7.	Media	37
9.8.	Awareness of ‘Come to the Heart’ slogan	38
9.9.	Emotional responses to Lismore City Centre (CBD).....	39
9.10.	Other input from respondents.....	40
9.11.	Who completed the survey – characteristics of respondents	43
9.11.1.	Shopping locations used by respondents	43
10.	Business Survey Results	52
10.1.	Perceptions of Lismore as a place to visit by business operators.....	52
10.2.	Perceptions of Lismore’s CBD as a shopping and service centre.....	54
10.2.1.	Gap between businesses respondents and public perceptions	55

10.3.	Perception of Lismore’s CBD public spaces by business operators	57
10.3.1.	Gap between performance and public satisfaction levels.....	58
10.4.	Overall satisfaction with the Lismore CBD	61
10.5.	Perceptions of improvement in the CBD over the past 2 years.....	62
10.6.	Awareness and involvement of businesses in LBP Program -organised activities and events	63
10.7.	Participation in LBP Program activities by Businesses	66
10.8.	Business’ perception of promotional activity success	69
10.9.	Awareness of ‘Come to the Heart’ branding	72
10.10.	Perceptions of Lismore’s vitality	73
10.11.	Awareness of LBP Panel and City Centre Manager role	74
10.12.	Continuation of the Special Business Rate Variation Levy (SBRVL)	76
10.13.	Other Input from Business Respondents	77
10.14.	Who completed the Business Survey - characteristics of respondents?	79
11.	Bibliography	85
12.	About the Authors	88
13.	Appendices.....	89
13.1.	Appendix 1	89
13.2.	Appendix 2	96

List of Figures

Figure 1: Perception of Lismore as a place to visit	31
Figure 2: Customer satisfaction and businesses weighted performance of shopping and service facilities	57
Figure 3: Customer satisfaction and businesses weighted performance of public space services	61
Figure 4: Graph of Vitality Scale Elements	74

List of Tables

Table 1 : List of Town Centre Management / BID Organisations*	14
Table 2: Perception of Lismore as a place to visit.....	30
Table 3: Perception of Shopping and Entertainment Aspects of Lismore City Centre (CBD)	32
Table 4: Perception of Public Spaces Aspects of the Lismore City Centre (CBD).....	33
Table 5: Perception of other aspects of the Lismore City Centre (CBD)	34
Table 6: Perception of Development in Lismore over past 2 years	34
Table 7: Awareness and Attendance of Annual Major Festivals and Events	35
Table 8: Awareness and Attendance of City Centre Entertainment.....	36
Table 9: Awareness and Attendance of Monthly and Weekly Attractions.....	36
Table 10: Awareness and Attendance of Community Events.....	36
Table 11: Awareness and Attendance of Arts and Cultural Activities	37
Table 12: Awareness and Attendance of Retail Promotions	37
Table 13: Awareness and Attendance of Sporting Events	37
Table 14: Media of awareness creation regarding events and promotions happening in Lismore	38
Table 15: Awareness of the advertising message / slogan / logo used to promote Lismore	39
Table 16: Media / place where logo has been seen	39
Table 17: Emotional Response to Lismore City Centre (CBD).....	40
Table 18: Open Comments from Respondents.....	42
Table 19: Frequency of shopping at listed locations	44
Table 20: Other locations where respondents indicated they shop regularly	44
Table 21: Gender.....	45
Table 22: Age group	45
Table 23: Annual household income	46
Table 24: Respondent owns / operates own business in Lismore City.....	46

Table 25: Employment Status	46
Table 26: Primary occupation (employed full time)	47
Table 27: Primary occupation (employed part time - not looking for additional work).....	48
Table 28: Primary occupation (employed part time - looking for additional work)	49
Table 29: Status if not in the labour force	49
Table 30: Years lives in the Northern Rivers	50
Table 31: Postcode.....	50
Table 32: Nearest Suburb / Village	51
Table 33: Perception of Lismore as a place to visit.....	53
Table 34: Extent the shopping and services facilities meet community needs.....	55
Table 35: Importance of shopping and services facilities.....	56
Table 36: Extent public space services meet the community needs	59
Table 37: Importance of public space services	60
Table 38: Satisfaction with the Lismore City Centre (CBD).....	62
Table 39: Perception of development of Lismore City Centre (CBD) in the past 2 years	63
Table 40: Comparison of Lismore Chamber members and non-members on development of the Lismore City Centre (CBD) over the past 2 years.....	63
Table 41: Awareness of LBP Program promotional activities	65
Table 42: Number of businesses participating in LBP Program promotional activities.....	68
Table 43: Perception of promotional activities and their success.....	70
Table 44: Perception of appropriateness of ways to encourage visitors to the Lismore City Centre ..	71
Table 45: Other promotional activity suggestions.....	72
Table 46: Awareness of the advertising message / slogan / logo used to promote Lismore	73
Table 47: Awareness of the Lismore Branding	73
Table 48: Perception of the Lismore City Centre (CBD)	74
Table 49: Awareness of LBP Panel and City Centre Manager	75

Table 50: Satisfaction with activities undertaken by the LBP Program	76
Table 51: Agreement to the continuation of the SBRVL beyond June 2013	77
Table 52: Perception of appropriate fund allocation to support Lismore Business	77
Table 53: Other Comments.....	78
Table 54: Gender.....	80
Table 55: Age Group	80
Table 56: Suburb	81
Table 57: Years of operation of own Business.....	82
Table 58: Membership at Lismore Chamber of Commerce.....	82
Table 59: Industry	82
Table 60: Primary business activity.....	83
Table 61: Full time employees	84
Table 62: Part time staff.....	84

Notes and Abbreviations

Notes: The Lismore Business Promotion *Program* is governed and directed by the Lismore Business Promotion *Panel*. The Program is the comprehensive set of projects contained within an approved Business Plan and the Panel is in effect the 'board' which governs and directs the program. As they both have the same acronym (LBPP), to avoid confusion these two separate entities are shown where appropriate throughout the research report as the LBP Program or LBP Panel.

Abbreviations:

BID	Business Improvement District
CBD	Central Business District
CCM	City Centre Manager
LBP Program	Lismore Business Promotion Program
LBP Panel	Lismore Business Promotion Panel
LCC	Lismore City Council
LCOC	Lismore Chamber of Commerce
LUA	Lismore Urban Area
SBRVL	Special Business Rate Variation Levy
SBRVLAG	Special Business Rate Variation Levy Advisory Group
TCM	Town Centre Management

1. Executive Summary

The Lismore Business Promotion (LBP) Program review was commissioned by Lismore City Council and the LBP Panel in September 2012 to obtain feedback on the performance of the LBP Program and LBP Panel, in order to identify directions for future activity.

Background:

The origins of the Lismore Business Promotion Program

Lismore City Council's receipt of the Lismore Alive Final Report (Sully, 2008) led to Council agreeing to establish the position of Lismore City Centre Manager (CCM) in early 2009. Based on exhaustive consultation with the business and wider community the Lismore Alive Report identified the challenges facing Lismore's city centre and provided recommendations for revitalising the Central Business District (CBD).

A Special Business Rate Variation Levy (SBRVL) was sought and obtained to fund the city centre revitalisation project and Lismore-wide marketing activities of the LBP Program. This program, now in its fourth year of operations, is actioned by the Lismore CCM and governed by the LBP Panel. The SBRVL has been in operation and administered by Lismore City Council since July 1, 1998.

The origin of the current Lismore Business Promotion Panel

At the time of Council's decision to appoint a CCM, the existing (but less strategically-focussed) business promotional activities were overseen by a 14-member SBRVL Advisory Group (SBRVLAG), which authorised a 4-member sub-committee to work with the inaugural CCM. At the SBRVLAG's own request, Council was asked to consider halving this number in the interests of efficiency and it authorised an interim and reduced SBRVLAG, before calling for nominations for a new body, the Lismore Business Promotion Panel, in late 2009.

The LBP Panel consists of 8 members, with a senior Council staff member as the non-voting Chair. The 7 voting members represent a wide cross-section of the Lismore business community, and of this number 3 are present to represent specific groups, or geographic zones: the Lismore Chamber of Commerce, Lismore Shopping Square (which contains the largest single concentration of SBRVL contributors) and an 'out-of city centre' businessperson.

It should be noted that the Council-approved focus for the LBP Program since its inception has been the revitalisation of the city centre - hence the CCM's position and activities. The CCM is required to operate primarily in a defined city centre geographic zone encompassing the CBD and a portion of North and South Lismore. However, the LBP Program's Business Plan (and budget) contains specific initiatives and funding for business promotional activities across the Lismore Urban Area (LUA). Much of the 'umbrella' advertising and marketing efforts of the CCM effectively cover the entire LUA.

Successive LBP Program Business Plans have contained consistent aims and objectives, which seek to position Lismore as a desired and vibrant destination for residents and visitors under the branding "Lismore – Come to the Heart" and further afield, "Lismore – Heart of the Northern Rivers". The annual or bi-annual LBP Program Business Plans are reviewed regularly by the LBP Panel and adjustments made to program components and projects are made as required.

How this review was commissioned

Council and the LBP Panel sought to assess the LBP Program and determine the extent to which the program is achieving its objectives, to provide recommendations for tactical elements in line with the strategic plan for future implementation and to benchmark operations against other Town Centre Management or Business Improvement District schemes similar to the LBP Program. As part of the review, feedback from businesses and the public was considered necessary, including obtaining feedback on the desire to keep the SBRVL beyond June 2013.

Southern Cross University undertook to review the LBP Program's activities and LBP Panel's stewardship. The project method followed a series of steps which included a call for submissions from the public, the use of in-depth interviews with the panel members and selected business operators and two online surveys specifically designed to collect data from business operators and another from the shopping public.

A total of eight submissions from the public were received, 17 in-depth interviews were conducted, and 216 usable responses (95 businesses and 118 public) from 260 received surveys provided input into this report. The extensive data collection process provided detailed input into the operations of the LBP Program activities from a broadly representative and wide range of respondents capturing a diverse range of views and opinions with no single group dominating the data collection process.

The following is a summary of key points arising from the 2012 LBP Program Review.

Is the LBP Program achieving its objectives?

Overall the feedback and information received in this review provides a qualified yes to the LBP Program achieving its objectives. The reviewers believe this needs some qualification however as there were clearly areas where further work and improvements could be made.

The following key successes have been achieved by the program and identified in the review:

- The 'Come to the Heart' branding has been rolled out and captured the attention of the public in general. Awareness of the branding is high among the public and businesses and the brand is recognised in the media.
- An extensive calendar of events has been undertaken that incorporates annual signature events, multiple city centre entertainment activities, regular monthly or weekly attractions, community events, arts and cultural activities, retail promotions and seminars and sporting events. Many of these have high awareness among the public.
- A comprehensive website has been established through a partnership of the LBP Panel and Lismore Tourism, with over 450 businesses featured on it to date. At the time of surveying this had not been launched so no feedback was obtained on awareness or success of the website.
- The LBP Panel has funded a significant number of promotional and community organisations' events to generate and support sustained activity in the city centre. This support has also included activities and co-operative promotions aimed at business operators.
- The Back Alley Gallery (laneways street art project) has been a key focus of activities to enliven the CBD and create a unique point of difference for the City.
- Successive City Centre Managers have obtained in-kind support and sought sponsorships and grants for the projects undertaken during the term of their contracted employment.

In terms of the performance of the Lismore Business Promotion Panel it was apparent that members worked well together and were cooperative, despite having differing goals and objectives.

While the activities of the LBP Program have been positive and also received general support from the community and many businesses a number of themes emerged throughout the research where

improvements could be made. These are summarised below although additional detail and commentary is provided in the report.

- While the branding for Lismore has received strong awareness, the 'buy-in' from businesses has been slow and requires increased support. Only 12% of businesses indicated they used the branding and there were a substantial proportion of businesses that were not familiar with the brand (30%). Branding needs to be acknowledged as a continual process and resources applied to this activity on a continual basis. In undertaking renewal, linking in recent promotional activities and themes needs to be incorporated into the program – for example the laneways project and other events. Consideration could also extend to more use of the branding message as 'Umbrella' advertising supporting other messages.
- The calendar of events creates a lot of 'busy' activity. This study provides evidence of some activities where there is good awareness, but only low involvement – both from the public and businesses perspective. A review of activities and consideration for future activities should consider the "buy-in" that can be achieved and consideration for concentration of resources for more impactful events be evaluated.
- The current City Centre Manager (CCM) role appears to be focused mainly on promotional activity and event management. This role could be expanded to leverage the resources of the LBP Program. A broadened focus could, for example, include a stronger "Centre Management" focus: i.e. city cleanliness, safety, vacant shops, city ambience, amenities. This would be in line with other international examples of town centre management.
- There also needs to be consideration of ways to develop programs that facilitate stronger independent business community activities rather than reliance on the LBP Program and CCM role. There is a risk that businesses will become too reliant on the LBP Program events and become complacent in their promotional activities. Resources should be allocated to support networks and groups of business operators to develop new markets and events. One possibility could be the establishment of sub-committees within the LBP Panel who are formed and disbanded as needed. Examples of such activities might include a network of Café proprietors developing targeted activity, which is then marketed to specific audiences. Similarly, a restaurant network could work on developing a Lismore Food Festival. Professionals, such as health practitioners or members of the real estate sector, could also be included in developing activities that relate to nationally-held events.
- Ineffective communication between the business community, CCM and the LBP Program - and Panel was a reoccurring theme. Awareness of these important roles is only moderate and there were numerous calls for the LBP Program to expand its focus beyond the CBD and

include communication with other shopping areas that could leverage off promotional activities. This also includes the use of alternative forms of media besides email as a means of communication. Personal meetings, open forums, SMS and newsletters could all be considered. The use of regular 'calls to action' for forthcoming events with the aim of enlisting the support of the business community is a further possibility.

- It was of concern that many in the business community perceived the performance of the LBP Program activities and events negatively. This, in part, can be attributed to the inadequate communication already mentioned, but was highlighted by the difference in perceptions between businesses and the general public. What becomes apparent is that if the local businesses have a negative attitude to the city then this attitude becomes self-fulfilling.
- 'Business operators' opinions were, however, broadly in line with those of consumers in relation to key facilities for the CBD. The LBP Panel should use this feedback to advocate for improvements that will lead to greater pride and interest in the community and businesses. This includes the presentation of shop fronts, shop opening hours, entertainment venues, public amenities, night-time security and facilities for disabled people.
- Governance and representation on the LBP Panel could also be reviewed at some future point. Traditional BIDs are business-community partnerships; generally with little government involvement. Such public-private partnerships have more autonomy and, it is suggested, can be more innovative in their approach to problems. Consideration for some community representation could be a starting point for further involvement of others on the Panel.
- The Special Business Rate Variation Levy (SBRVL) is viewed by some as a 'Tax' and the CCM position as a Council employee rather than an advocate of business development. Revised nomenclature and positioning of these two key elements could be considered. The Business Investment District (BID) name is a case in point, suggesting 'investment' as opposed to 'tax'. Likewise a City 'Brand' or 'Place' manager more strongly communicates the role more aptly.

Feedback and responses from the Surveys has provided a detailed list of 'ideas' that could be considered for future promotional events and activities. These range from relatively 'simple to implement' activities (a Lismore on Sale promotion) through to larger infrastructure projects (a walking bridge from the CBD to South Lismore). Full details of these are included below.

The LBP Program and its role as a combined TCM/BID operator

The Lismore Business Promotion Program model is seen as being a hybrid of the Town Centre Management (TCM) and Business Improvement District (BID) approaches. This approach takes in positive aspects of the UK town centre management approach which tends to have a stronger community-oriented approach with a focus on place making, and the North American BID model which has a stronger philanthropic focus.

The LBP Program aims to achieve the objectives of both approaches by having a Panel (consisting of representatives from the full spectrum of businesses in the Lismore Urban Area (LUA), the Lismore Chamber of Commerce and Council oversee the allocation of resources raised through a special levy on business properties - the Special Business Rate Variation Levy (SBRVL). The LBP Panel in turn utilises a CCM to be the conduit between the Panel and businesses and to assist in the design and implementation of annual or bi-annual Business Plans, which are required to be approved by the Panel and Lismore City Council.

The Lismore approach is quite unique in Australia and can be considered 'innovative' and 'leading edge'. Only a few other examples of the approach were identified from the literature review including the Geelong Mainstreets program and Victoria City Centre Organisation. The growing interest and success of the annual conferences with a focused attention on the role of CCM in Australia provides support for the approach. Further, the TCM/BID approach was seen as being more proactive and as an alternative to the traditional town "beautification" approach used by many Councils.

It was noted a summary of the LBP Program was provided at the 2012 International Cities, Town Centres and Communities (ICTC) conference as a keynote address, and received extremely positive attention. It is recommended documentation and communication of the approach should be undertaken for presentation to further national and even international audiences. The development of a case study would be one approach to obtaining favourable recognition for the approach undertaken by the LBP Program -and Panel.

LBP Program and role of Lismore Chamber of Commerce

Based on the literature and review of business improvement and place making organisations in Australia the role of Chambers of Commerce is seen as being distinct from the role of branding and place making for cities. The key roles of Chambers of Commerce are to focus on advocacy and incorporate training and networking of their membership. The mission of the NSW Chamber of Commerce, for example, is to "help businesses maximise their potential". As such, the Lismore

Chamber of Commerce should ideally play an important role in contributing to the LBP Panel and already does this through its membership position. Having an active member from the Chamber on the LBP Panel and ensuring good relations with this long-established body is seen as being an important part of stakeholder involvement for the Panel.

It was noted, however, that the current Chamber membership represents only a portion of all businesses in the LUA and while vocal, may at times, present the views of only one group of business operators. Consideration for a balance of all LUA's business interests is necessary for the Panel.

Business Community's desire for continuation of the SBRVL Levy

While the Business survey registered some dissatisfaction with the activities undertaken by the LBP Program it appeared that there is broad support for the continuation of the additional SBRVL funding to support the LBP Program's activities. Seventy three per cent (73%) of business respondents indicated they agreed to the continuation of the levy.

This result provides support for the continuation of the LBP Program and recognition by the business respondents that a combination of the 'Lismore-come to the heart' branding and year round events and activities has been a positive output for the CBD.

In terms of the future allocation of LBP Program resources business respondents indicated it should be allocated on the basis of 80% of the annual budget being split between marketing, advertising, events and place-making; with the remaining 20% to be allocated to business and community activities (including out of city centre activities), plus a contingency fund.

2. Summary of Ideas arising from the Study

The following is an unvetted list of ideas that have been identified during the research process and are presented in no particular order.

- Expand the remit of the LBP Program to work with other shopping areas beyond the CBD
- Promote outside the area to get people to come to Lismore
- Improve signage into and in the CBD
- Roof over Brown Street car park
- Create a food festival like Bangalow's sample festival - marry regional produce with outlets
- Making more of the riverside, e.g. by adding in bus stops and pedestrian crossings, build a foot bridge linking the CBD with South Lismore
- Make Woodlark Street like Magellan Street, having better parking, and do more things like the twilight markets
- Focus on maintenance of key facilities and signage. E.g. riverbank and visitor information centre area – high tourism traffic areas
- Create a fashion festival, a trade festival, an industrial festival, a sport festival – link to other initiatives e.g. Pink ribbon day – a women's day
- Have a 'Lismore's on sale' day – that way it will draw people to the town altogether
- Incorporate a cultural heritage component into the LBP Program's plans
- A 'Toilet Map' be created to let visitors and the public know where toilet facilities are in the CBD
- Identify and target new customer groups – e.g. cycling, motor bikes riders, adolescent sporting events, signature sporting events
- Pensioner day/ afternoon twice monthly at participating shops, discounts on production of age pension
- Improve customer service
- Knock and drop (flyer delivery)
- Signature events - big name events (majors) such as A-league, trade expos, major artists, etc
- Better inform businesses outside the CBD
- Shop local campaign
- More entertainment / musical events
- Announcements over the speakers for promos
- Get more people to live in Lismore's CBD

3. Introduction

The origins of the Lismore Business Promotion Program

Lismore City Council's receipt of the Lismore Alive Final Report (Sully, 2008) led to Council agreeing to establish the position of Lismore City Centre Manager (CCM) in early 2009. Based on exhaustive consultation with the business and wider community the Lismore Alive Report identified the challenges facing Lismore's city centre and provided recommendations for revitalising the Central Business District (CBD).

A Special Business Rate Variation Levy (SBRVL) was sought and obtained to fund the city centre revitalisation project and Lismore-wide marketing activities of the LBP Program. This program, now in its fourth year of operations, is actioned by the Lismore CCM and governed by the LBP Panel. The SBRVL has been in operation and administered by Lismore City Council since July 1, 1998.

The origin of the current Lismore Business Promotion Panel

At the time of Council's decision to appoint a CCM, the existing (but less strategically-focussed) business promotional activities were overseen by a 14-member SBRVL Advisory Group (SBRVLAG), which authorised a 4-member sub-committee to work with the inaugural CCM. At the SBRVLAG's own request, Council was asked to consider halving this number in the interests of efficiency and it authorised an interim and reduced SBRVLAG, before calling for nominations for a new body, the Lismore Business Promotion Panel, in late 2009.

The LBP Panel consists of 8 members, with a senior Council staff member as the non-voting Chair. The 7 voting members represent a wide cross-section of the Lismore business community, and of this number 3 are present to represent specific groups, or geographic zones: the Lismore Chamber of Commerce, Lismore Shopping Square (which contains the largest single concentration of SBRVL contributors) and an 'out-of city centre' businessperson.

It should be noted that the Council-approved focus for the LBP Program since its inception has been the revitalisation of the city centre - hence the CCM's position and activities. The CCM is required to operate primarily in a defined city centre geographic zone encompassing the CBD and a portion of North and South Lismore. However, the LBP Program's Business Plan (and budget) contains specific initiatives and funding for business promotional activities across the Lismore Urban Area (LUA).

Much of the 'umbrella' advertising and marketing efforts of the CCM effectively cover the entire LUA.

Successive LBP Program Business Plans have contained consistent aims and objectives, which seek to position Lismore as a desired and vibrant destination for residents and visitors under the branding “Lismore – Come to the Heart” and further afield, “Lismore – Heart of the Northern Rivers”. The annual or bi-annual LBP Program Business Plans are reviewed regularly by the LBP Panel and adjustments made to program components and projects are made as required.

4. Project Overview

Southern Cross University undertook to review the Lismore Business Promotion Program’s 2011-2013 Business Plan with a view to determine the extent to which the program was achieving its objectives and to provide feedback on future elements of the program and associated strategy.

The project method followed was:

1. Use of discussions and in-depth interviews with the LBP Panel and Council to identify key issues and themes in the performance and operation of the program’s activities.
2. Obtain access to and review existing reports, and relevant documents to assess the efficacy of the Panel’s operation and the Program’s impact on local business activity.
3. Call for submissions from local business operators for feedback and comment on LBP Program activities over the past 18 months.
4. Obtain feedback from businesses and residents using an online survey tool to collect feedback on promotional activity in the Lismore area. This was not intended to be a statistically representative sample but to obtain a broad range of feedback and ideas on the promotion activities undertaken in the region.

This report presents the results of the review and details the findings from the surveys and interviews conducted as part of the study.

The report comprises four sections.

SECTION 1 reviews the literature on business improvement districts and city centre management. This review forms the basis for a comparison between national and international practice and activities of the LBP Program that are presented later in the report.

SECTION 2 reports on results from interviews with the panel members and focuses on the operation of the panel.

SECTION 3 reports on the results from a small number of businesses who made submissions in response to calls for input to the review and in-depth interviews conducted with a number of local businesses drawn from across the City. These results are analysed on a thematic basis.

SECTION 4 reports on the results from two surveys that were undertaken to obtain specific feedback from the public and businesses on perceptions of Lismore as a shopping and service area as well as specific information on the CBD. Results from the two surveys are compared and provide a useful contrast in understanding the impact and effect of promotional activities undertaken by the LBPP.

5. Revitalising Towns

The concept of Business Improvement Districts (BIDs) emerged following the move toward large scale 'one-stop' shopping centres which were established in new suburbs and developments on the edge of town or away from urban centres. These shopping centres developed a full shopping experience by providing abundant parking, a wide range of retail and shopping outlets and department stores, all in a climate controlled environment that was attractive to shoppers. In rural communities the effect was even more dramatic as shoppers were drawn toward larger regional centres where there was a wider assortment of shops and goods. As a consequence the viability and vitality of many towns and traditional shopping areas has been at the forefront of discussions worldwide (Riviezzo, de Nisco et al. 2009).

Throughout the world a number of models have emerged in an attempt to counter the flow of shoppers to large shopping centres away from 'downtown', 'high street' or 'Central Business Districts (CBD)'. These have been referred to differently – in the UK they are largely known as Town Centre Management (TCM) while in North America they are referred to as Business Improvement Districts (BIDs). In New Zealand the term BIDs has been adopted while in Australia the concept of BIDs and variations on TCM appear from region to region with many Councils focusing their efforts on main street or CBD rejuvenation programs. More recently there has been growing interest in the social aspect of this rejuvenation with programs accepting the notion of 'place making' or 'place management' which incorporate branding, marketing and activity components.

5.1. Town Centre Management

Town Centre Management (TCM) or City Centre Management (CCM) has emerged as a practical answer to town revitalisation (Page and Hardyman 1996) particularly at the local level through the marketing of the urban place as a shopping destination (Stubbs, Warnaby et al. 2002). Yet, TCM also has an ability to embrace physical and socio-economic contexts of town centres, rather than solely focusing on retailers' interests (Otsuka and Reeve 2007). TCM is seen as "the search for competitive advantage through the maintenance and/or strategic development of both public and private areas and interests within town centres, initiated and undertaken by stakeholders drawn from a combination of the public, private and voluntary sectors" (Warnaby 2000).

The discussion on the variety of TCM practices traces its evolution from an emphasis on 'janitorial' improvements to urban infrastructure through to a more strategic approach with an emphasis on long-term development (Hogg, Medway et al. 2001; Stubbs, Warnaby et al. 2002).

TCM is about *"gathering and sharing information, enabling stakeholders to work together in the strategic planning process, setting up formal and informal communication and social networks between partners, training the town's stakeholder employees to implement the regeneration strategy and maintain a marketing orientation, evaluating success, in order to both motivate all involved and to access progress"*(Whyatt, 2004 cited in Coca-Stefaniak, Parker et al. 2009).

In continental Europe TCM approaches depend upon the involvement of retailer and other town centre small businesses, with the cooperation of these businesses being the major objective. Whereas, the UK approach in contrast, is explicitly about the development of competitive advantage for town and city centres (Coca-Stefaniak, Parker et al. 2009).

TCM initiatives typically need to continually justify their benefits to funding agents because outcomes from TCM projects are not always immediately visible (Wright 2000) given their longer term strategic nature.

5.2. Business Improvement Districts (BIDs)

BIDs can be viewed as an extension of the TCM scheme, often existing as a sub-committee of TCM organisations (Cook 2009). The BID concept was first developed in North America as a funding mechanism for TCM (Hoyt and Gopal-Agge 2007). BIDs and BID-like organisations represent concentrated effort by the business community to change perceptions of their district, overcome public resource limits and respond to changes in the competitive environment (Levy, Gibson et al.

n.d.). BIDs oversee public spaces and their improvements, such as pedestrian walkways and sanitation (Davies 1997) as well as manage the growth in arts and entertainment-based redevelopment (Ward 2006).

A BID is a partnership between a local authority and the local business community to develop projects and services that will benefit the trading environment within the boundary of a clearly defined commercial area (The National BIDs Advisory Service 2012). Nevertheless, the funding source of BIDs differs across the globe. For example in England, BIDs are funded primarily through mandatory taxes on businesses (Cook 2009). Whilst, some American BIDs are special districts where property owners voluntarily tax themselves to fund improvements (Davies 1997). Despite this, variations do exist where there is an absence of a self-taxing mechanisms, but agreement on the implementation of public service enhancement (Ward 2006).

Overall however, whilst the BID charter is similar to TCM schemes, it does differ in the fact that business occupiers are allowed to vote on whether a BID can be established in their district. According to Cook (2009) this is not the case for most TCM schemes.

5.3. Stakeholder Partnerships

City centre vitality and viability is important to a wide range of stakeholders including: retailers, landlords, investors, shoppers, local authorities, the police, bus companies, property owners and local residents (De Nisco, Riviezzo et al. 2008). Recent literature on TCM embraces physical and socio-economic contexts of town centres, rather than simply a focus on retailers' interests (Otsuka and Reeve 2007). It is recognised that retailing is only one aspect of the urban experience (De Nisco, Riviezzo et al. 2008). This holds true for BID models too, which are not compatible with a purely commercial and retail centred perspective on the value of town and city centres (Otsuka and Reeve 2007).

All stakeholders must have the ability to generate ideas and work together on developing the town to its best potential (McAteer and Stephens 2011). If stakeholders are brought together that can drive change the TCM or BID scheme becomes a viable compliment to town planning, and the regeneration of towns. A list of organisations supporting TCM or BIDs is presented in Table 1.

Table 1 : List of Town Centre Management / BID Organisations*

<p>International Cities, Towns Centres and Communities (ICTC) Society</p> <p>The Australia based International Cities, Towns Centres and Communities (ICTC) society assists cities, towns and communities to be as environmentally, socially & economically sustainable as possible by bringing together the required visionary professionals. They aim to enhance the quality of life of inhabitants of cities, towns & communities and facilitate world best practices in the planning, development and management thereof and particularly the planning, development and management of public spaces and infrastructure.</p> <p>http://www.ictcsociety.org/</p>
<p>Association of Town Centre Management (UK)</p> <p>The UK based Association of Town Centre Management works with their members in making places better, focusing on district, town and city centres. ATCM also work with their partners to develop the people who work in all aspects of town centre management or BID development to ensure they have the wide range of knowledge and skills to do a great job. They liaise with stakeholders and government to create effective partnerships that are accountable and sustainable and are able to make change happen.</p> <p>www.atcm.org</p>
<p>Town & Cities New Zealand</p> <p>A New Zealand organisation assisting member town and city centre organisations to develop sustainable economies and raised property values by providing them with opportunities to improve governance. They encourage and facilitate educational opportunities for existing town and city centre managers and assist in the development of towns and foster best practice principles of urban design and architecture in town and city centres.</p> <p>http://townsandcities.org.nz/default.asp</p>
<p>Mainstreet Australia</p> <p>Mainstreet Australia is a national association, providing networking, education, support and strategic direction for all stakeholders. Their goal is to promote and ensure that Community Business Centres remain the beating heart of communities. Mainstreet Australia organises and runs information seminars, workshops, networking events, and other forums relating to strip shopping and the issues faced by traditional centres.</p> <p>http://www.mainstreetaustralia.org.au/Pub/pStart.asp</p>
<p>International Downtown Association</p> <p>The International Downtown Association is a champion for vital and liveable urban centres and strives to inform, influence and inspire downtown leaders and advocates. Founded in 1954, the International Downtown Association has more than 600 members worldwide and is the guiding force in creating healthy and dynamic centres that anchor the well-being of towns, cities and regions of the world.</p> <p>https://www.ida-downtown.org/</p>

Project for Public Spaces (PPS)

Project for Public Spaces (PPS) is a US based non-profit planning, design and educational organization dedicated to helping people create and sustain public spaces that build stronger communities. Their pioneering 'place making' approach helps citizens transform their public spaces into vital places that highlight local assets, spur rejuvenation and serve common needs. Founded in 1975 they have completed projects in over 2500 communities in 40 countries and all 50 US states.

<http://www.pps.org/>

5.4. Lismore City Model

The Lismore Business Promotion Program model is seen as being a hybrid of the Town Centre Management (TCM) and Business Improvement District (BID) approaches. This approach takes in positive aspects of the UK town centre management approach which tends to have a stronger community-oriented approach with a focus on place making, and the North American BID model which has a stronger philanthropic focus.

The LBP Program aims to achieve the objectives of both approaches by having a Panel (consisting of representatives from the full spectrum of businesses in the Lismore Urban Area (LUA), the Lismore Chamber of Commerce and Council oversee the allocation of resources raised through a special levy on business properties - the Special Business Rate Variation Levy (SBRVL). The LBP Panel in turn utilises a CCM to be the conduit between the Panel and businesses and to assist in the design and implementation of annual or bi-annual Business Plans, which are required to be approved by the Panel and Lismore City Council.

The Lismore approach is quite unique in Australia and can be considered 'innovative' and 'leading edge'. Only a few other examples of the approach were identified from the literature review including the Geelong Mainstreets program and Victoria City Centre Organisation. The growing interest and success of the annual conferences with a focused attention on the role of CCM in Australia provides support for the approach. Further, the TCM/BID approach was seen as being more proactive and as an alternative to the traditional town "beautification" approach used by many Councils.

It was noted a summary of the LBP Program was provided at the 2012 International Cities, Town Centres and Communities (ICTC) conference as a keynote address, and received extremely positive attention. It is recommended documentation and communication of the approach should be undertaken for presentation to further national and even international audiences. The development

of a case study would be one approach to obtaining favourable recognition for the approach undertaken by the LBP Program -and Panel.

5.5. LBP Program and role of Lismore Chamber of Commerce

Based on the literature and review of business improvement and place making organisations in Australia the role of Chambers of Commerce is seen as being distinct from the role of branding and place making for cities. The key roles of Chambers of Commerce are to focus on advocacy and incorporate training and networking of their membership. The mission of the NSW Chamber of Commerce, for example, is to “help businesses maximise their potential”. As such, the Lismore Chamber of Commerce should ideally play an important role in contributing to the LBP Panel and already does this through its membership position. Having an active member from the Chamber on the LBP Panel and ensuring good relations with this long-established body is seen as being an important part of stakeholder involvement for the Panel.

It was noted, however, that the current Chamber membership represents only a portion of all businesses in the LUA and while vocal, may at times, present the views of only one group of business operators. Consideration for a balance of all LUA’s business interests is necessary for the Panel.

6. Results from the Study

6.1. Written Submissions

The Lismore Business Promotion Program Review received eight (8) written submissions from local businesses and community stakeholders. The themes identified across the submissions included:

- The LBP Program and its strategic marketing plan
- Branding and Public Relations
- The Special Business Rate Variation Levy
- Liaison with Lismore City Council and the City Centre Manager
- Liaison with community and business
- Lismore services, streets and facilities
- Events

6.2. The LBP Panel and its Business Marketing Plan

Overall respondents were supportive of the Panel concept: *"We agree that funding should be used to promote Lismore City (especially the CBD) as a desired destination for visitors and residents"*^{S5}. Some respondents were clearly supportive of the current panel: *"The LBP Panel has worked well to date"* ^{S1}. But some respondents were concerned about the implementation of the current Panel's projects: *"the role is very important but performance seems very poor"* ^{S7}.

Further to this, some respondents were not sure about what projects the Panel was working on and wanted to see some reports detailing current projects and outcomes so they could evaluate the performance of the work by the Panel. One respondent was struggling to see other revitalisation initiatives of the LBP Program in action: *The branding program COME TO THE HEART was already in existence & I am personally struggling to identify other revitalisation issues achieved"*^{S2}.

There was also concern that the LBP Program's 2011-13 strategic marketing plan ignored the cultural heritage elements of Lismore: *"The key overarching objective of the LBP Program as stated in the 2011-2013 Lismore Business Marketing Plan is 'to promote and activate Lismore's City Centre in order to achieve our vision of positioning the place as a desired and vibrant destination for residents and visitors to conduct business, socialise, enjoy the products, services and place. Seventeen components are listed as being the most effective to achieve the objective. None of these relates to the history or heritage of Lismore"*^{S4}.

6.3. 'Come to the Heart' Branding

Respondents were generally positive about the 'Come to the Heart' brand: *"Fantastic brand" S7. "The "Lismore – Come to the Heart" branding is great as the general punters can instantly recognise this brand and know the business or event is based in Lismore" S8.* However, respondents were divided on the implementation of the brand: *"... very poor roll out of the use of the brand" S7. "The graphic and media coverage has been engaging, well targeted and well received" S1.* And one respondent asked if there were any subsidies available to them if they were to incorporate the brand in their advertising: *"...if a small retailer like myself is to again embark on advertising & incorporate "come to the heart" theme is any subsidy available to me?" S2.*

6.4. Special Business Rate Variation Levy

It was suggested that the SBRVL should not be used to fund a City Centre Manager, but the funding instead be allocated solely to the implementation of programs: *"It is my strongly held view that SBRVL contributions should not be used to pay wages of any contracted or employed council staff- this has only happened the past few years—the CBD needs funds spent on its presentation & not on wages" S2.*

6.5. City Centre Manager and LBP Panel members

While the work of the Panel and City Centre Manager were acknowledged as being important and valued it was apparent that better communication and information sharing between the Panel and City Centre Manager with businesses could be improved. Feedback clearly identified the need for greater collaboration and involvement of businesses in activities and extended to the governance of the LBP Program.

There was an acknowledgement that: *"Panel incumbents have been well-prepared, committed, professional and hardworking" S1.* However it was suggested that individuals with stronger business backgrounds should be employed in the City Centre Manager role: *"it is essential to stop appointing marketing people as the City Centre Manager and look to a business person with marketing skills who better understands business" S7.*

Respondents also felt that there was poor communication with businesses overall: *"Very poor public relations with businesses" S7* and *"City Centre Management should keep retailers more informed of the outcomes of the meetings attended by us and should call in occasionally to give and receive*

feedback”S5. It was also suggested that any ideas brought to the Panel needed to be supported by all stakeholders: “Obviously there are many ideas that could be brought to fruition for promotion but to ensure any of these ideas work the support needs to come from all involved parties including the business owners, Lismore Business Promotions Panel, City Centre Manager and Lismore City Council” S8.

One respondent made it clear that the Panel needed to remain as independent from Council as possible: *“It is essential to change the Panel members regularly to bring fresh ideas to the table on a regular basis. It is essential to keep political positions out of the Panel. It is essential to break the close link between the LBP Panel and the Economic Development Advisory Group:- the only member sitting on both should be the Councillor representative. It is essential to open lines of communication with all business owners including those who do not agree with any particular political position since their ideas may still be good for all stakeholders” S7.*

6.6. Lismore Services, Streets and Facilities

Respondents commented on graffiti and suggested that the SBRVL could fund the clean-up of graffiti: *“There is a major problem with graffiti around the town which creates a bad image. This needs to be addressed. We suggest that the cleaning could be funded from the SBRVL or from the inflated rates charged on business properties in the CBD” S5.*

Availability of public toilets was also a key concern to respondents: *“The proposed Keen Street toilet block should be commenced immediately as visitors to town are constantly asking for toilet facilities”S5. “Toilet and baby change facilities. We are not going to be able to compete with the Square until we can provide similar facilities” S3.*One respondent suggested that a toilet map be created to help guide visitors to the right spot: *“council should provide street maps so that visitors coming into shops can find these facilities as they are not well known”S2.*

Respondents identified security as a concern, as well as the cost associated with accessing CCTV footage: *“CCTV camera in the CBD - If an incident occurs and a retailer wants the footage checked, they are required to pay a charge for this service. This should be covered under the SBRVL that we already pay for” S5.*

Parking was a problem for one respondent, particularly enforcing the parking times. The respondent suggested that paid parking would be a simple fix: *“Paid parking is a source of legal revenue for*

Council—it should investigate latest technology re policing parking to raise more dollars as roads etc need funding”S2.

Respondents noted the importance of place-making: *“Place-making is a result of collaboration, investment of resources and a focus on an authentic, lived experience for locals and visitors. It is an important part of the commercial distinctiveness of a CBD – shopfronts, interior design, street furniture, plantings...” S1.* But other suggested that the LBP Program had not implemented it well: *‘Place-making’ as a business promotion strategy: fantastic idea but another buzz word being implemented poorly”S7.* One respondent suggested looking outside the region for inspiration: *“Beautification of the CBD – Ballina have done it well, perhaps we could follow their example” S5.* One respondent noted that businesses actually needed help to start place-making: *“Businesses around town need help with window dressing and visual merchandising as every business in our CBD reflects on the Lismore shopping experience” S3.*

As part of the place-making process respondents identified empty shops as contributing negatively: *“The ambience of the Lismore City Centre is extremely important in attracting visitors not only to initially visit but to keep returning to the area but this is assisted in having a high percentage of the shops filled, there is nothing more depressing than seeing the amount of empty shops around the street” S7.* *“We certainly need to put pressure on empty shop owners to maintain shop fronts in a manner which reflects well on the CBD” S3.*

6.7. Events

There were a number of comments made about the events held in Lismore, and one respondent noted that the LBP Program needed to support these more: *“Lismore holds several successful events in Lismore annually and the LBP Program should support these well-established events with promotion and advertising through the CBD and surrounds” S8* and suggested that the LBP Program was too focused on the markets and art events: *“It appears to date the main focus by the LBP Program has been on markets and art activities in the CBD which do not appear to draw a large number of visitors, perhaps the focus needs to be broadened to include the aforementioned promotion of local events in the advertising of the LBP Program and ways individual businesses can be more involved in promoting their business cohesively with these events” S8.*

Overall, most comments made on events, were with regard to the city centre markets and it seems that this is quite a provocative topic. One respondent didn’t think the markets should be funded by ratepayers and then operated by non-rate paying businesses: *“MARKETS No ratepayer funds*

should be used to promote markets that sell against rate paying shops” S2. “Markets, e.g. Twilight Markets, Farmers Markets: once a month specialty markets are ok. The twice weekly farmer's market is a joke” S7.

6.8. Future

One respondent commented positively on where they envisioned the future of Lismore: *“The future: Consolidate. Keep the momentum going. Consolidate. Sustain regional interest and build the distinctiveness. Celebrate success of programs beyond awards – take the community on the journey – they are the business’ customers and are part of a partnership” S1.*

7. Interviews with LBP Panel Members

Panel members were interviewed as part of the review process and to gain an understanding of the way the Panel operated and to inform later interviews and surveys. The following Lismore Business Promotion Program panel members were interviewed:

- Brent McAlister (Non-voting Chair) Director Sustainable Development LCC
- David Martin Chair, Lismore Chamber of Commerce
- Michael Haddin Manager Betta Lismore (formerly Chandlers)
- Hayley Brown Company Director and non-CBD representative
- Daniel McCabe Manager, Event Cinemas, Lismore and NSW
- Cr Isaac Smith LCC elected representative
- Rob Walker Manager, Lismore Shopping Square
- Bill Sheaffe Caddies Coffee
- Katie O'Rourke (non-voting) City Centre Manager

Each were asked a series of questions around the following areas and the subsequent sections provide a summary of the findings based on themes that emerged from the discussions:

- What is your involvement in the LBP Program as a Panel member?
- How does the Panel work from your perspective? contributing ideas, involvement
- What LBP Program activities have been successful? and not so successful?
- What issues do you see as problematic?
- What do you see as potential future benefits of the Program and Panel?

7.1. City Centre Manager (CCM)

- Having a CCM has made such a difference to the panel; someone who is recommending projects and giving reasons in support of them. Far more focussed, guided and strategic. The CCMs have been good at judging what ideas are going to work, we've had a lot of wins.
- City Centre Manager (CCM) role is supported by Panel members.
- CCM should be less involved with Council paperwork.
- CCM should extend projects on from advertising.

- The LBP Program needs to work through the CCM to make sure the public spaces are well maintained.
- CCM needs more time out on the streets.

7.2. LBP Panel

- High level of support and commitment from LBP Panel to continue to invest in the revitalisation of Lismore as a whole, including Goonellabah and South Lismore.
- General consensus that LBP Panel members work well together and are on the same page.
- There is general consensus that there have been some successful events (Back Alley Gallery, Mother's Day, Lantern Parade), but there is still a long way to go to ensure their growth and success in future years. Some Panel members question the value of these events to bring in people with money into Lismore.
- The LBP Program needs to continue to help projects to evolve. There were suggestions that the LBP Program stop funding events that are well-established or self-sufficient.
- Most Panel members want to improve the buy-in of businesses into projects run by LBP Program.
- The LBP Program needs to tell businesses how they can leverage off projects, e.g. what to do when an event is on. Focus far more around how the business can benefit.
- LBP Panel needs to become more independent. There needs to be a mechanism for the Panel to evolve its governance structure to ensure it can operate more effectively. But there is no need to change the existing structure just now.
- The LBP Program Business Plan should continue to work with those who want to work with it - there is a very real need for generational change in the business community.

7.3. Problematic Areas

- General acknowledgment of ineffective communication with businesses and some frustration that the wider community does not necessarily link the 'Come to the Heart' brand and the increased level of events and activities in Lismore with the efforts of the Panel.
- Mixed feedback on the continuation of the Special Business Rate Variation Levy with most Panel members wanting it to continue, and some to have it increased. One individual member wanted the SBRVL to be stopped.

- Mixed feedback on the role of Council on the LBP Panel. Some questioned the wisdom of a senior Council executive being involved as (non-voting) Chair of the Panel.
- A number of Panel members noted that, to date, food retailers seem to benefit most from the projects run by the LBP Program.

8. In-depth Interviews with Business Operators

Seven business owners and managers were interviewed from a range of industries across the Lismore council area to provide comment and in-depth insights into issues relating to the LBP Program's activities and events. Ideas from the interviews were incorporated into the business and public surveys. The operators covered the business areas of Goonellabah, East Lismore, South Lismore, the Lismore Shopping Square and the Lismore CBD. The respondents were all experienced operators and had been in business for more than 5 years.

Respondents were asked to comment on a number of areas relating to the activities of the LBP Program and City Centre Manager including:

- their understanding of and involvement with the Lismore Business Promotion Program;
- the role of the Lismore City Centre Manager and what it means to them;
- the role of the Lismore Chamber of Commerce in regard to businesses in Lismore;
- what the 'Come to the Heart' brand means to them and whether or not they had adopted the brand;
- how the Special Business Rate Variation Levy affects their business;
- what some of the main issues facing Lismore as a regional centre are; and
- where they would like to see Lismore heading in the future.

8.1. The LBP Panel

Not all business interviewees had heard of the LBP Panel, and were unsure what the Panel actually did for businesses in the Lismore Urban Area. Of those who did know of the Panel, they were clear in stating that that they had not been approached by any Panel members for input into the LBP Program's activities. Despite this, some were keen to support anything the Panel were to do if it benefited the business community in the CBD, because they believed that generally, people wanted to see the town do well.

When prompted about the LBP Program, some interviewees couldn't see what had been done apart from the markets on Thursday downtown. Some suggested that businesses have difficulty understanding the long term view of the LBP Program, e.g. understanding the value of creating atmosphere over quick sales. More than one interviewee suggested that events were not being tied in with retail, e.g. linking in with businesses to offer event attendees dining and entertainment information.

One business interviewee did acknowledge that there were some flow-on business to South Lismore from events, namely the Lismore Show and the Lantern Parade.

Whilst another noted he had never heard discussions about the LBP Program and its activities with any trade customers.

8.2. Lismore City Centre Manager

There was general acknowledgement that City Centre Manager Katie O'Rourke had done an extremely good job under difficult conditions, and that 'there were no two ways about it'.

It was also acknowledged that the City Centre Manager, the LBP Panel and Council's Tourism and Events units worked closely together and combined resource often, for the betterment of Lismore. There were overlaps in roles, but all involved worked hard to ensure there was no duplication of effort or resources.

Business interviewees suggested that the City Centre Manager needed to meet with businesses across all Lismore shopping zones to talk about the LBP Program's revitalisation strategies more often. Some interviewees had not met the City Centre Manager. Further to this, new businesses need to be promoted more through the City Centre Manager, even outside the CBD area.

8.3. The Lismore Chamber of Commerce

Of those businesses interviewed only 2 were members of the Lismore Chamber of Commerce, and the others didn't know much about the organisation. There was confusion about the two organisations with some business interviewees not able to distinguish between the LCOC and the LBP Panel. Those that knew the difference saw the Chamber of Commerce's role as primarily being for advocacy and training of business.

There was a suggestion that the LCOC and the LBP Panel needed to provide regular and affordable customer service workshops for retailers.

8.4. The 'Lismore-come to the heart' brand

There was broad knowledge and awareness of the 'Come to the Heart' brand, but not of the LBP Program itself or the peak business group -the LBP Panel - administering it. Some interviewees wanted to put a face to the 'Come to the Heart' brand and to know more about it, before they started to use it in their own advertising.

'Lismore-come to the heart' TV advertisements appeared to be the main source of interviewee's knowledge of the brand. Some interviewees suggested that whilst the TV advertisements were good, they didn't promote any change to entice people to come to town again. The TV advertisements did not promote or show any shopping area outside the CBD, and this was seen by most as a negative factor in the uptake of the branding. According to some interviewees, there were only about three businesses currently using the brand.

Some interviewees would not use the branding unless it was more inclusive of the wider Lismore area. There were suggestions that the branding didn't help reduce the divisiveness of the CBD and the Square, and that there needed to be more promotion of what's happening across Lismore as a whole.

It was accepted that the 'Come to the Heart' brand has limited appeal outside the Northern Rivers, but that the allied tourism brand ('Lismore, heart of the Northern Rivers') is used to help balance this. But some interviewees were concerned that it wasn't the right message for Lismore nonetheless. One interviewee outside of the CBD area suggested that the 'Come to the Heart' was too parochial; they weren't the 'Heart', they were the 'Liver', they believed the brand needed to be broadened; 'come to the whole body'. Furthermore, the 'Come to the Heart' brand was not promoted enough.

8.5. The Special Business Rate Variation Levy

Most interviewees were supportive of continuing the SBRVL, but on the proviso that there were wider reaching benefits for businesses outside of the CBD area. Whilst on the other hand, some businesses saw the SBRVL as merely a cost of doing business and were not interested in participating in local initiatives.

8.6. Issues facing Lismore as a regional centre

A sampling of the business interviewees comments included: 'Lismore is just that little bit different - it's a little bit alternative', 'it's a beautiful place to live and be'. For example, the 'pie cart should be cherished and protected at all costs!', the CONartist market has great potential and the 'Pop-Up Gallery is a fantastic initiative'. But Lismore isn't promoted very well; you can drive right past it on the highway. People come to Lismore to meet people or for a specific event; people don't just meander through. Lismore is competing with Byron Bay here".

One interviewee suggested that people had given up on the area having a better economic outlook. Big jobs are going out of town and the outside contractors bring everything into town, they don't spend anything when they are in Lismore. Further to this Lismore doesn't have any industry and the biggest employers are cutting back (hospital and university) – that's not a positive outlook. There is some investment coming through South Lismore, but not anything too major for the CBD. The LBP Panel and Council need to bring in big business, which will filter people into town. The LBP Program also needs to promote the growth areas of Lismore, like Goonellabah to entice people to shop in the region. One interviewee said that many people see the flow on effects of a strong vibrant community and think it happens because it happens, they don't realise that business brings business.

Vacant shops have a negative effect on the city centre, as people don't want to visit if there are many empty shops. One interviewee suggested this actually made people shop at the Lismore Shopping Square rather than in the CBD. There were many interviewees who noted a feeling of divisiveness between the CBD and the Lismore Shopping Square. Further to this, it was acknowledged by some that Lismore is not simply one central location anymore, e.g. Goonellabah Village Shopping area, Wyrallah Road Shopping Centre, and this affects walk-by shopping and business opportunities.

There were positive comments made about the local markets, and the lack of due acknowledgement and respect they receive for what they do for the area. Markets were seen as 'being critical to keeping any local economy stimulated' and were 'an important part of tourism'.

It was believed there needs to be more integration between the different facets of the whole Lismore LGA – e.g. agriculture. Make it so there 'is something amazing happening every weekend' so people don't have to worry about picking their weekend, because 'something will be on'.

There was concern about the planning of activities with things sometimes happening in the CBD at the same time as the regional markets. This creates problems as the public are split on where to go and are pulled in different directions, as a result activities compete with each other for shoppers.

Extended trading hours, better customer service, undercover parking (and no fines) are other important components that need to be addressed for the CBD to work well also.

8.7. Lismore in the future

There was strong consensus that Lismore should create a festival similar to the Bangalow 'Sample' Festival to showcase local businesses and that they should do more things like the markets in Magellan Street that draw people to the entire town. There was also a suggestion that the LBP Program should widen its scope to include more sporting events and industrial activities, rather than focusing on fashion, jewellery and food all the time. Further to this, there needs to be more regional coordination of events, to benefit the whole community.

There was a suggestion that parking needed to be policed in the South Lismore shopping area and that Council needed to focus on the maintenance of key facilities and signage in high tourism traffic areas. There was also a suggestion that there should be a foot bridge linking the CBD with South Lismore, and that the riverbank in South Lismore needed to be revitalised and showcased.

There was a suggestion that the Economic Development and City Centre Manager positions needed to sit within the Arts, Tourism and Leisure work unit of council to streamline processes, rather than relying on the informal partnerships that currently exist.

9. Community Survey Results

9.1. Perceptions of Lismore as a place to visit

Respondents generally had positive perceptions of Lismore as a place to visit. Over 83% of respondents agreed or strongly agreed that Lismore has a good range of sporting facilities while 75% believed Lismore serves as a cultural centre for the community and 77% agreed there is a good mix of business services in Lismore. Most respondents also agreed that there was a good range of cultural activities, adequate quick-stop shopping opportunities and a good mix of retail stores with adequate browsing opportunities.

Lismore was not perceived as having identifiable landmarks or historical attractions and only 46% agreed or strongly agreed that Lismore has a pleasant looking streetscape. These three aspects were identified from the literature as attracting people to an area and could be considered in future promotional activities by the LBP Program.

Table 2: Perception of Lismore as a place to visit

Question	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Mean n=114
Lismore has a good range of sporting facilities	0.88%	7.02%	8.77%	59.65%	23.68%	3.98
Lismore serves as a cultural centre for the community	0.88%	7.89%	16.67%	52.63%	21.93%	3.87
There is a good mix of business services in Lismore	2.63%	6.14%	14.04%	61.40%	15.79%	3.82
Lismore has a good range of cultural activities	1.75%	12.28%	21.05%	50.00%	14.91%	3.64
There are adequate quick-stop shopping opportunities in Lismore	2.63%	10.53%	17.54%	59.65%	9.65%	3.63
There is a good mix of retail stores in Lismore	4.39%	14.91%	12.28%	54.39%	14.04%	3.59
There are adequate browsing shopping opportunities in Lismore	4.39%	16.67%	22.81%	48.25%	7.89%	3.39
Lismore has identifiable landmarks	2.63%	23.68%	27.19%	41.23%	5.26%	3.23
Lismore has a pleasant -looking streetscape	7.02%	17.54%	29.82%	38.60%	7.02%	3.21
Lismore has a good range of historical attractions	2.63%	28.07%	28.07%	38.60%	2.63%	3.11

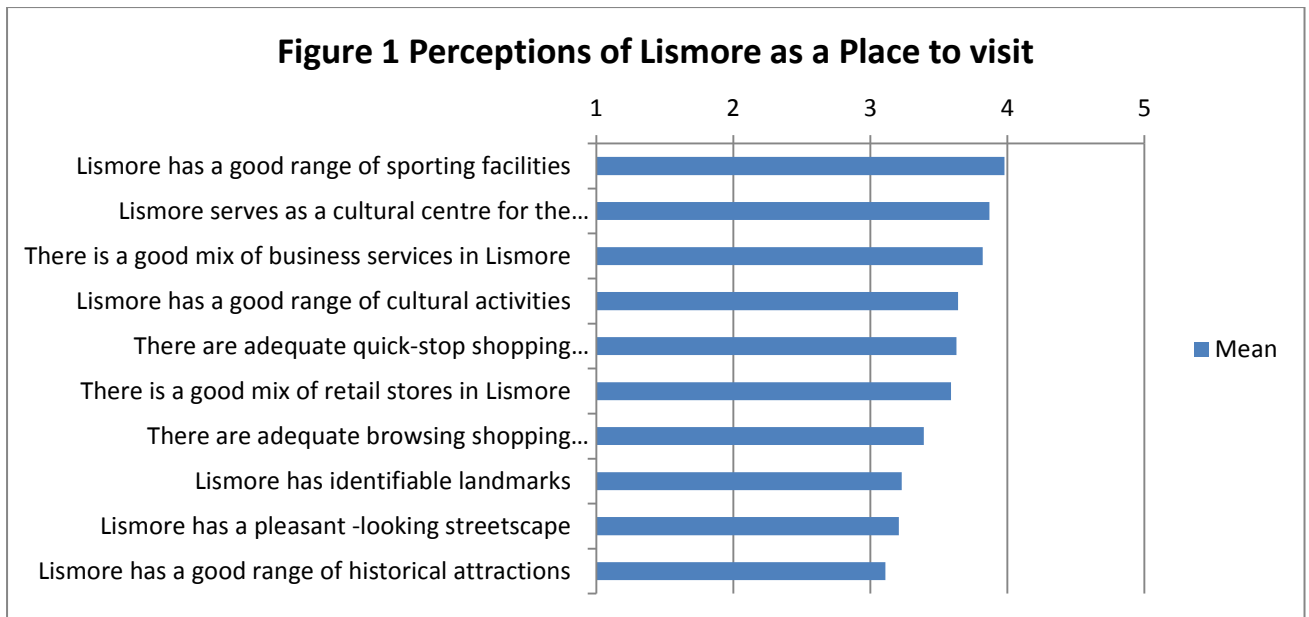


Figure 1: Perception of Lismore as a place to visit

9.2. Perceptions of Lismore’s CBD as a shopping and service centre

The majority of respondents indicated the range of services, such as banks, government departments and real estate agents in the CBD were either satisfactory or very satisfactory. Over half (54%) were also either satisfied or very satisfied with the range of retail shops, parking, range of dining experiences and customer service, although it is noted that the proportion of very satisfied respondents is low on this last item.

Items with the least satisfaction included organised activities and events, shop opening hours and range of entertainment venues. Shop opening hours and range of entertainment venues had the highest combined dissatisfied and very dissatisfied scores of 43% and 42% respectively.

Table 3: Perception of Shopping and Entertainment Aspects of Lismore City Centre (CBD)

Question	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Mean N=112
Range of services (banks, government depts., real estate agents etc.)	1.79%	3.57%	16.07%	63.39%	15.18%	3.87
Range of retail shops	3.57%	12.50%	30.36%	45.54%	8.04%	3.42
Availability of parks and public spaces	5.36%	16.07%	25.89%	41.07%	11.61%	3.38
Range of dining experiences	5.36%	18.75%	21.43%	43.75%	10.71%	3.36
Customer service	4.46%	15.18%	26.79%	50.89%	2.68%	3.32
Organised activities and events	4.46%	14.29%	35.71%	38.39%	7.14%	3.29
Shop opening hours	8.93%	33.93%	21.43%	33.93%	1.79%	2.86
Range of entertainment venues	8.04%	33.93%	28.57%	25.00%	4.46%	2.84

9.3. Perception of Lismore's CBD public spaces

The majority of respondents were satisfied with daytime security, footpaths, signage, cleanliness and presentation of parks and public spaces. Although it is noted that no single item obtained more than 5% of respondents indicating 'very satisfied' suggesting the items are only meeting expectations and not exceeding expectations.

There was a general neutral and higher level of dissatisfaction for a range of items including presentation of shop fronts, visual attractiveness of the CBD area, parking, night-time security, cleanliness and availability of public toilets. The majority of people indicated a neutral score for facilities for disabled people although the item was scored by 12% as very dissatisfied.

It is interesting to note, while parking for Lismore generally (Table 4) was satisfactory, parking for the CBD was still perceived as being an issue for many shoppers. 36% of respondents indicated their dissatisfaction with parking in the CBD. The items identified with the greatest level of dissatisfaction were the availability and cleanliness of public toilets and night time security.

Table 4: Perception of Public Spaces Aspects of the Lismore City Centre (CBD)

Question	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Mean N=112
Daytime security	2.68%	6.25%	31.25%	58.04%	1.79%	3.50
Footpaths in the CBD area	6.25%	16.07%	17.86%	57.14%	2.68%	3.34
Signage in the CBD	4.46%	12.50%	31.25%	50.89%	0.89%	3.31
Cleanliness of CBD area	5.36%	16.96%	28.57%	44.64%	4.46%	3.26
Presentation of parks and public spaces	6.31%	19.82%	24.32%	45.05%	4.50%	3.22
Presentation of shop fronts	1.79%	22.32%	34.82%	40.18%	0.89%	3.16
Visual attractiveness of CBD area	5.36%	25.89%	25.89%	40.18%	2.68%	3.09
Availability of Parking	8.93%	26.79%	23.21%	38.39%	2.68%	2.99
Facilities for disabled people	11.61%	9.82%	60.71%	17.86%	0.00%	2.85
Night time security	10.71%	26.79%	39.29%	23.21%	0.00%	2.75
Cleanliness of public toilets	17.86%	25.89%	40.18%	15.18%	0.89%	2.55
Availability of public toilets	22.32%	43.75%	25.89%	8.04%	0.00%	2.20

9.4. Overall satisfaction with the Lismore CBD

Two overall measures of satisfaction were obtained from respondents (Table 5). The results indicate that the majority (52%) of respondents are either satisfied or very satisfied with the information they obtain on what's happening in the CBD although 24% indicated they were dissatisfied or very dissatisfied. The results suggest more could be done to improve people's knowledge of what was happening in the CBD.

Respondents were also asked for their overall level of satisfaction with shopping and service facilities in the CBD. Overall respondents were satisfied, 62% indicated they were either satisfied or very satisfied.

The findings were further analysed to identify the factors about the CBD that most strongly aligned with respondent's overall satisfaction levels. The analysis indicated that the visual attractiveness,

range of services, availability of parks and public spaces, signage and range of retail shops were the most important factors in overall satisfaction of the CBD.

It is suggested that the LBP Panel pay attention to these elements in their planning activities.

Table 5: Perception of other aspects of the Lismore City Centre (CBD)

Question	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Mean N=111
Being informed about what's happening in the CBD	3.60%	20.72%	23.42%	38.74%	13.51%	3.38
Overall, how satisfied are you with shopping and service facilities in Lismore's City Centre (CBD)?	2.70%	10.81%	24.32%	54.95%	7.21%	3.53

9.5. Perceptions of improvement in the CBD over the past 2 years

Respondents were asked to indicate their level of agreement to a number of statements about changes that have occurred over the past two years. Respondents indicated they agreed or strongly agreed that the CBD had improved (67%), was more attractive (66%) and makes them want to visit more often (45%). The findings suggest that a large proportion of respondents had seen some positive improvement over the past two years, although fewer agreed that the changes made them want to visit the CBD more often.

Table 6: Perception of Development in Lismore over past 2 years

Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean N=112
Has improved	3.57%	8.04%	21.43%	42.86%	24.11%	3.76
Is more attractive to me	5.36%	6.25%	22.32%	46.43%	19.64%	3.69
Makes me want to visit more often	5.36%	16.07%	33.93%	29.46%	15.18%	3.33

9.6. Awareness and attendance at LBP Program activities and events

To determine the impact of LBP Program activities respondents were asked to indicate whether they were aware of activities that had been supported by the LBP Program and, if so, if they had attended the event. The results are grouped into the type of activity and presented in Tables 7 -13 below.

The results indicate there was high awareness of many activities. The events with the greatest awareness were the major annual events where awareness was around 70% or higher for most events. Other activities with high awareness included the produce and twilight markets, Back Alley Gallery and 'Art in the Heart' project. Activities which did not have high awareness included the community events – 'Family Fun in the Sun Day', 'Our Kids Samson Challenge' and 'In Good Company'.

In terms of attendance many events had relatively low attendance, some despite high awareness. It appears that awareness does not always translate into attendance. This could be for multiple reasons such as the timing, appeal and relevance of the event to the audience, or the large number of competing activities which occur in Lismore and the surrounding region. The tables below provide a benchmark for future comparisons and the attendance ration could be used to evaluate events for overall effectiveness.

The LBP Panel could use the results in this section to evaluate events for future funding and support.

Table 7: Awareness and Attendance of Annual Major Festivals and Events

Question	I heard about it	I went to it
Lismore Lantern Parade	81%	49%
North Coast National (Lismore Show) 2012	77%	27%
Lismore Turf Club Cup Day	67%	9%
Tropical Fruits New Year's Party	75%	5%
Carols by Candlelight	68%	17%
NAIDOC Week 2012	56%	9%

Table 8: Awareness and Attendance of City Centre Entertainment

Question	I heard about it	I went to it
Lismore Festival of Fitness – Truck Pull	57%	6%
Queer Fruits Film Festival	36%	7%
NORPA Little Big Shots	33%	6%
Summerland Classic Cars 2011	43%	11%
Lismore Yarn Guerrilla's Yarn Bombing	39%	16%

Table 9: Awareness and Attendance of Monthly and Weekly Attractions

Question	I heard about it	I went to it
Northern Rivers Conservatorium 'CONcerts'	47%	19%
Lismore Produce Markets	79%	53%
Lismore Twilight Markets	69%	45%
CONartists' Market	47%	25%

Table 10: Awareness and Attendance of Community Events

Question	I heard about it	I went to it
Family Fun in the Sun Day	20%	4%
Our Kids Samson Challenge	31%	9%
In Good Company	20%	9%

Table 11: Awareness and Attendance of Arts and Cultural Activities

Question	I heard about it	I went to it
The Back Alley Gallery	71%	44%
Lismore Art in the Heart Project	67%	37%
NORPA Namatjira	29%	8%
Peggy Pop Arts ChARTered Tours (Lismore Regional Gallery)	31%	8%
NORPA Open House	22%	6%

Table 12: Awareness and Attendance of Retail Promotions

Question	I heard about it	I went to it
Lismore Stocktake Sale Weekend 2012	64%	31%
Lismore Christmas Shopping promotion 2011	59%	36%
Mother's Day 2012	54%	25%

Table 13: Awareness and Attendance of Sporting Events

Question	I heard about it	I went to it
Lismore Masters Games	65%	6%
2012 Northern University Games	60%	7%
V8 Dirt Modified	35%	7%

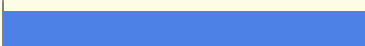

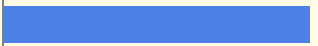

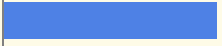

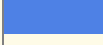

9.7. Media

The most mentioned media for how respondents heard about events and promotions happening in Lismore was 'word of mouth'. Over three quarters of respondents mentioned word of mouth. This was followed by 'The Echo' (71%), social media or online (64%) then 'The Northern Star' (54%). It

would appear that newspapers feature strongly in communicating events and activities compared to electronic media such as radio and television. Somewhat concerning is the low mention of ‘In-store’ which could be incorporated by more local businesses to promote forthcoming events and activities.

Other media mentioned included emails, posters, pamphlets, fliers, and catalogues and other local media (newsletters and newspapers).

Table 14: Media of awareness creation regarding events and promotions happening in Lismore

Media		Response	%
Word of Mouth (friends)		85	76%
The Echo		80	71%
Online (including social media)		72	64%
The Northern Star		61	54%
Television		50	45%
Radio		42	38%
In - store		25	22%
Other (Please specify):		10	9%

9.8. Awareness of ‘Come to the Heart’ slogan

The LBP Program adopted a branding strategy based on the slogan ‘Come to the Heart’ in 2009. Respondents were asked if they could name the slogan. This question was posed as an unaided question to measure awareness and the extent of knowledge around the brand slogan as it is an indicator of the promotional efforts of the LBP Program activities over the past two years.

Awareness among respondents was very high with 70% of respondents being able to correctly name the slogan. A small group (23%) were not able to name the slogan while a further 7% providing incorrect responses. Two of these related to a former branding – the ‘Rainbow Region’.

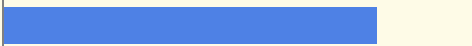

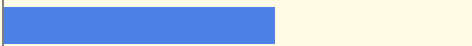



The results provide evidence of good awareness of the slogan among respondents.

The majority of respondents indicated they have seen the Lismore brand Logo in newspaper advertising followed by television advertising. Only 3% indicated they have never seen the logo before (see Table 16).

Table 15: Awareness of the advertising message / slogan / logo used to promote Lismore

Statistic	Value	
Come to the Heart / Lismore – Come to the heart	83	70%
Not able to respond	27	23%
Rainbow Region	2	2%
Other - incorrect	6	5%
Total Responses	118	100%

Table 16: Media / place where logo has been seen

Answer		Response	%
In newspaper advertising		87	78%
In TV advertising		82	74%
In tourist information about Lismore		63	57%
In stores		66	59%
Yes, but not sure where I have seen it		11	10%
No, have not seen or heard of it		3	3%

9.9. Emotional responses to Lismore City Centre (CBD)

A central theme in the literature relating to the attractiveness and health of a town was its vitality. In order to measure Lismore's CBD vitality a five-point semantic differential scale was used. A semantic differential scale employs two extreme terms for a concept. Respondents are asked to indicate a position between each of terms that best reflects their feelings toward the target object. Six items

were used for the scale covering liveliness (lifeless), energy (sluggish), spirit (lethargic), alert (weary), attractive (repels) and vital (not vital). Analysis confirmed the six items were a good measure of vitality based on inter-correlations between items and reliability tests.

Table 17 presents the mean scores for each item and the overall scale. With the exception of Alert-Weary, all items had a mean score above three indicating respondents had positive responses to the CBD. The mean overall score was 3.17 for the scale indicating a weak positive indication to Lismore's CBD vitality.

In summary, shoppers see Lismore's CBD as having vitality, although the sentiment was not held by all shoppers.

Table 17: Emotional Response to Lismore City Centre (CBD)

Scale item	Mean score*
Alive-Lifeless	3.25
Energetic –Sluggish	3.04
Spirited – Lethargic	3.19
Alert – Weary	2.97
Attracts me – Repels me	3.42
Has vitality – Does not have vitality	3.14
Overall Score	3.17
*Higher score indicates positive emotion; based on 1-5 scale	

9.10. Other input from respondents

At the end of the survey respondents were provided the opportunity to add additional comments they wished to make concerning shopping and services provided in Lismore. Their comments were analysed and classified into 30 themes which are summarised in Table 18 below. In some cases comments covered multiple issues; these were coded into more than one theme. Full details of the comments and associated theme are listed in Appendix A which has been sorted based on the first theme identified with the comment. A total of 57 respondents took the opportunity to make comments.

A good number of respondents made positive comments about shopping in Lismore and particularly about the activities and events undertaken by the LBP Panel and provided encouragement to continue the work as it was seen as having an impact on the CBD. In addition to the positive comments a small number of respondents made negative comments with specific issues that did not relate to shopping or the CBD more broadly.

The second theme raised by respondents, and which echoed the statistical data, was the call for longer shopping times by businesses. In some cases this was directed toward food outlets and cafes particularly on weekends. Some shoppers indicated it was very hard to shop in the CBD when they were working full-time and could not get to town during the week day.

Respondents also commented on the atmosphere and 'look' of the CBD. There were calls for more beautification of the streets and shop frontages. This was reflected in a number of specific themes that included suggestions for greater cleanliness, more park areas and shade and greater utilisation of the river foreshore.

A small number of respondents mentioned the range of shops and availability of items needed improving. One respondent commented that they had used the Internet for shopping because they did not feel the shops provided them with sufficient range.

Nightlife and after hours entertainment were also raised as issues with Lismore's CBD and gave the sense that the town was 'dead at night'.

The remaining themes and comments provided suggestions and ideas for improving the CBD and provide the reader with a range of views that could be considered further in developing future plans for Lismore and the CBD.

Note: Comments by respondents which could be considered defamatory or of a personal kind have not been included in this list.

Table 18: Open Comments from Respondents

Comment's theme	Number of comments
Positive comments	10
Shopping times	7
Atmosphere	5
Negative comments	5
Use river more	5
Beautification needed	4
Cleanliness	4
Parks	4
Shopping range	4
Nightlife	3
Parking	3
Shade	3
Customer service	2
Disability	2
Public transport	2
Survey	2
Café culture	1
CBD housing	1
Communications	1
Creative arts	1
Entertainment	1
Expand CBD	1
Focus on food	1
Link to coastal traffic	1
More activities for visitors	1
More cultural events	1
Neighbourhood shops	1
Space usage	1
Support for markets	1
Trees	1

9.11. Who completed the survey – characteristics of respondents

The survey was completed using an online survey methodology. As such it is acknowledged that the sample may not be representative of the Lismore population, however this was not the objective of the study; the focus was on obtaining the views and opinions from a broad cross section of the community. This section provides descriptive information on the sample to demonstrate the characteristics of the sample thus providing the context for the responses obtained in the survey feedback.

The sample consisted of 118 responses, which is an adequate size to undertake statistical analysis and obtain a broad view of opinions across the community. The descriptive results below indicate the sample represented shoppers who frequented a full range of shops in the Lismore area and have a wide range of experience with Lismore's shopping centres.

The sample was overrepresented by females (70%) which can be expected for a survey of shoppers and included people from a broad range of ages; particularly a good proportion in the main shopping age range of 20-50 years (72%). The majority of respondents (68%) had income levels above the Lismore mean income level and the sample included a small number of business owner/operators (19%). The majority of respondents were employed full-time or part-time and worked in professional occupations.

Most respondents had lived in the Northern Rivers for more than 20 years while 43% had moved to the area in the past 20 years. Respondents indicated their residential address were in the 2480 postcode areas while 16% were from outside the area. Of those indicating 2480 as their postcode area, a summary of their suburb/village indicated an extensive coverage across all areas of the Lismore City area.

Based on the summary data the sample is considered to be broadly representative of a wide range of respondents and captures a diverse range of views and opinions with no single group dominating the sample.

9.11.1. Shopping locations used by respondents

Table 19 summarises the locations where respondents shop in Lismore and the surrounding areas. The table reveals most respondents shop at Lismore CBD or Lismore Square with 60% of respondents indicating they shop in the Lismore CBD once a week and 37% of respondents indicating

they shop at Lismore Square more than once a week. Just over 30% of respondents shop at Lismore Central once a week or more.

Gold Coast locations are shopping destinations for the majority of respondents (65%) at least some time during the year but not as often as once a month.

The table also reveals the sample contains respondents who shop occasionally at Lismore's other shopping areas. Table 20, summarises other places where shopping was undertaken. It includes a number of Lismore outlets and village shops. The results are interpreted as an indication that the respondents have a wide range of experience with Lismore's shops and shopping centres.

Table 19: Frequency of shopping at listed locations

Question	Never	Less than Once a Month	Once a Month	2-3 Times a Month	Once a Week	2-3 Times a Week	Daily
Lismore City Centre CBD	0.85%	9.32%	11.86%	17.80%	21.19%	27.12%	11.86%
Lismore Square	5.08%	9.32%	20.34%	27.97%	17.80%	16.10%	3.39%
Lismore Central	13.64%	25.45%	14.55%	13.64%	16.36%	12.73%	3.64%
Coles Goonellabah	32.48%	17.09%	10.26%	14.53%	11.97%	11.97%	1.71%
Woolworths Goonellabah	45.69%	15.52%	12.93%	8.62%	9.48%	6.03%	1.72%
Wyrallah Road Shops	43.97%	23.28%	7.76%	10.34%	8.62%	5.17%	0.86%
Ballina	39.83%	36.44%	11.02%	5.93%	0.85%	4.24%	1.69%
South Lismore	47.41%	29.31%	10.34%	7.76%	2.59%	1.72%	0.86%
Goonellabah Rous Road	56.41%	19.66%	8.55%	5.98%	5.98%	1.71%	1.71%
East Point Shopping Ctr	54.31%	19.83%	12.07%	5.17%	7.76%	0.86%	0.00%
Gold Coast Locations (e.g.Robina/Pacific Fair)	35.90%	53.85%	8.55%	0.85%	0.00%	0.00%	0.85%

Table 20: Other locations where respondents indicated they shop regularly

Other Location	Count
Other Lismore; includes the Farmers/Organic Market, Carboot Market,	19

Aldi, North Lismore, Mennins, Lombardos, Online	
Other Villages in the region including; Nimbin, Alstonville, Byron Bay, Coraki, Bangalow, Mullumbimby, Modanville, Casino	24
Brisbane	2
Sydney	2

Table 21: Gender



Answer		Response	%
Male		33	30%
Female		78	70%
Total		111	100%

Table 22: Age group








Answer		Response	%
18 -19		1	1%
20-29		25	23%
30-39		34	31%
40-49		20	18%
50-59		18	16%
60-69		11	10%
70 and over		2	2%
Total		111	100%

Table 23: Annual household income

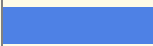

Answer		Response	%
Below \$40,000		35	32%
Above \$40,000		76	68%
Total		111	100%

Table 24: Respondent owns / operates own business in Lismore City



Answer		Count	%
Yes		21	19%
No		89	81%
Total		110	100%

Table 25: Employment Status

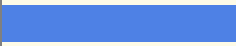





Answer		Response	%
Employed full time (35+ hours per week)		55	50%
Employed part time - not looking for additional work		26	23%
Employed part time - looking for additional work		11	10%
Unemployed - looking for full time work		2	2%
Unemployed - looking for part time work		3	3%
Not in the Labour force		14	13%
Total		111	100%

Table 26: Primary occupation (employed full time)

Answer		Count	%
Professionals		26	47%
Technicians and Trade Workers		1	2%
Clerical and Administrative Workers		7	13%
Managers		12	22%
Labourers		0	0%
Community and Professional Service Workers		5	9%
Sales Workers		4	7%
Machinery Operators and Drivers		0	0%
Total		55	100%

Table 27: Primary occupation (employed part time - not looking for additional work)

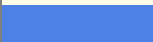






Answer		Count	%
Professionals		8	32%
Technicians and Trade Workers		1	4%
Clerical and Administrative Workers		6	24%
Managers		4	16%
Labourers		0	0%
Community and Professional Service Workers		2	8%
Sales Workers		4	16%
Machinery Operators and Drivers		0	0%
Total		25	100%

Table 28: Primary occupation (employed part time - looking for additional work)

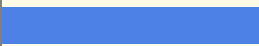



Answer		Count	%
Professionals		6	55%
Technicians and Trade Workers		0	0%
Clerical and Administrative Workers		0	0%
Managers		0	0%
Labourers		1	9%
Community and Professional Service Workers		3	27%
Sales Workers		1	9%
Machinery Operators and Drivers		0	0%
Total		11	100%

Table 29: Status if not in the labour force

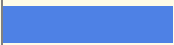


Answer		Response	%
a homemaker		5	36%
Retired		8	57%
a student		1	7%
Total		14	100%


Table 30: Years lives in the Northern Rivers

Statistic	Value
Total Responses	118
Mean number of years living in the Northern Rivers	20.8 years
0-9 Years	23.1%
10-19 Years	19.4%
20-29 Years	36.1%
30-39 Years	15.7%
40-49 Years	2.8%
50-59 Years	1.9%
60-69 Years	.9%
70 and over	0.0%

Table 31: Postcode

Statistic	Value
Total Responses	111
2480 Postcode	84%
Other 24.. Postcodes	14%
Postcode outside 24..	2%

Table 32: Nearest Suburb / Village

Answer		Response	%
Chilcotts Grass		2	2%
Clunes		1	1%
Corndale		1	1%
East Lismore		12	13%
Eltham		1	1%
Girard's Hill		5	5%
Goolmangar		1	1%
Goonellabah		23	25%
Gundurimba		1	1%
Howards Grass		1	1%
Lismore		12	13%
Lismore Heights		13	14%
Modanville		1	1%
Nimbin		4	4%
North Lismore		3	3%
Richmond Hill		2	2%
Rock Valley		1	1%
Rosebank		1	1%
South Lismore		1	1%
The Channon		2	2%
Tregeagle		1	1%
Tuckurimba		1	1%
Tullera		1	1%
Whian Whian		1	1%
Total		92	100%

10. Business Survey Results

10.1. Perceptions of Lismore as a place to visit by business operators

Business operators had positive perceptions about Lismore as a place to visit. They recognised that the area had good sporting facilities (89% agree or strongly agree), there was a good mix of business services (75%) and believed there was a good mix of retail stores in Lismore (77%).

The majority of respondents agreed or strongly agreed that Lismore serves as a cultural centre for the community (61%) and that there are adequate browsing shopping opportunities in Lismore (64%); although it is noted a small proportion (9%) strongly agreed with this statement. There was also general agreement that Lismore has a good range of cultural activities (55%) and there are adequate quick-stop shopping opportunities (61%) although the strength of the sentiment is not as strong for this item; the proportion of strongly agree was small (5%).

There were three items where there was not general agreement among the business respondents. The majority did not agree or strongly agree that Lismore had identifiable landmarks, a pleasant looking streetscape nor a good range of historical attractions.

Table 33: Perception of Lismore as a place to visit

Question	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Mean N=103
Lismore has a good range of sporting facilities	0.00%	1.94%	8.74%	62.14%	27.18%	4.15
There is a good mix of business services in Lismore	0.97%	4.85%	7.77%	69.90%	16.50%	3.96
There is a good mix of retail stores in Lismore	0.97%	10.68%	15.53%	60.19%	12.62%	3.73
Lismore serves as a cultural centre for the community	0.00%	14.56%	24.27%	46.60%	14.56%	3.61
There are adequate browsing shopping opportunities in Lismore	2.91%	11.65%	21.36%	55.34%	8.74%	3.55
Lismore has a good range of cultural activities	0.00%	15.53%	29.13%	43.69%	11.65%	3.51
There are adequate quick-stop shopping opportunities in Lismore	5.83%	10.68%	22.33%	56.31%	4.85%	3.44
Lismore has identifiable landmarks	1.94%	17.48%	35.92%	39.81%	4.85%	3.28
Lismore has a pleasant -looking streetscape	4.85%	22.33%	26.21%	44.66%	1.94%	3.17
Lismore has a good range of historical attractions	0.97%	33.98%	33.01%	27.18%	4.85%	3.01

10.2. Perceptions of Lismore's CBD as a shopping and service centre

Business operators indicated that the shopping and services in Lismore's CBD were either fair or good with many indicating some items were poor and only one aspect of the CBD having more than 10% of respondents scoring it excellent.

The majority of respondents indicated the range of services, such as banks, government departments and real estate agents in the CBD was either good or very good with just over 10% indicating them as being excellent. Business operators believed the range of retail shops, dining experiences, activities and events, customer service and shop opening hours were good or better. Fewer than 5% scored any of these items excellent. The range of entertainment venues and presentation of shop fronts were considered poor to fair by the majority.

To understand these items further respondents were asked to indicate the importance they placed on each of the items. These results are presented in Table 35 and sorted based on the mean score. The table of data indicates business operators consider all the items important but the most important being customer satisfaction followed by the presentation of shop fronts. These two items are distinct from the next group which includes the range of dining experiences, retail shops, activities and events and shop opening hours. The least important items from the group were range of entertainment venues and range of services.

The results were further analysed by developing a weighted performance score which takes into account the performance score and the importance score. The mean weighted performance score for each item is presented in Figure 1.

The maximum possible value for the weighted performance score is 25 (5 x 5) based on the responses from each of the two questions. Only one item was scored greater than the midpoint of 12.5 (Range of Services). Customer services and range of retail shops are scored just below the midpoint with 12.4 and 12.2 respectively.

The results indicate that local business operators do not perceive the performance of most shopping and service features of Lismore's CBD are performing well and efforts to improve performance in these areas could be a focus for future activity of the LBP Panel.

10.2.1. Gap between businesses respondents and public perceptions

The weighted performance scores were compared to the mean customer satisfaction scores obtained in the public survey. There is a strong correlation between the two scores (.88) indicating higher public satisfaction scores correspond to higher business performance scores and confirming business operators' understanding of performance is consistent with the perceptions of the public. The implication of the findings is that by improving areas with lower performance and satisfaction scores the public's shopping experience will improve leading to higher satisfaction scores and increased customer traffic. The three leading areas to be targeted are; presentation of shop fronts, shop opening hours and range of entertainment venues.

Table 34: Extent the shopping and services facilities meet community needs

Question	Poor	Fair	Good	Very Good	Excellent	Mean N=96
Range of services (banks, government depts., real estate agents etc.)	1.04%	9.38%	41.67%	36.46%	11.46%	3.48
Range of retail shops	3.13%	20.83%	48.96%	22.92%	4.17%	3.04
Range of dining experiences	9.38%	29.17%	37.50%	18.75%	5.21%	2.81
Customer service	9.38%	31.25%	36.46%	19.79%	3.13%	2.76
Range of activities and events	12.50%	35.42%	33.33%	14.58%	4.17%	2.63
Shop opening hours	12.50%	31.25%	45.83%	10.42%	0.00%	2.54
Range of entertainment venues	18.75%	38.54%	30.21%	11.46%	1.04%	2.38
Presentation of shop fronts	13.54%	52.08%	23.96%	10.42%	0.00%	2.31

Table 35: Importance of shopping and services facilities

Question	Very Un- important	Un- important	Neutral	Important	Very Important	Mean N=96
Customer service	2.08%	0.00%	5.21%	32.29%	60.42%	4.49
Presentation of shop fronts	2.08%	1.04%	9.38%	58.33%	29.17%	4.11
Range of dining experiences	3.13%	0.00%	15.63%	52.08%	29.17%	4.04
Range of retail shops	2.08%	2.08%	12.50%	60.42%	22.92%	4.00
Range of activities and events	3.13%	2.08%	13.54%	55.21%	26.04%	3.99
Shop opening hours	3.13%	1.04%	18.75%	52.08%	25.00%	3.95
Range of entertainment venues	3.13%	1.04%	19.79%	56.25%	19.79%	3.89
Range of services (banks, government depts., real estate agents etc.)	2.08%	0.00%	22.92%	59.38%	15.63%	3.86

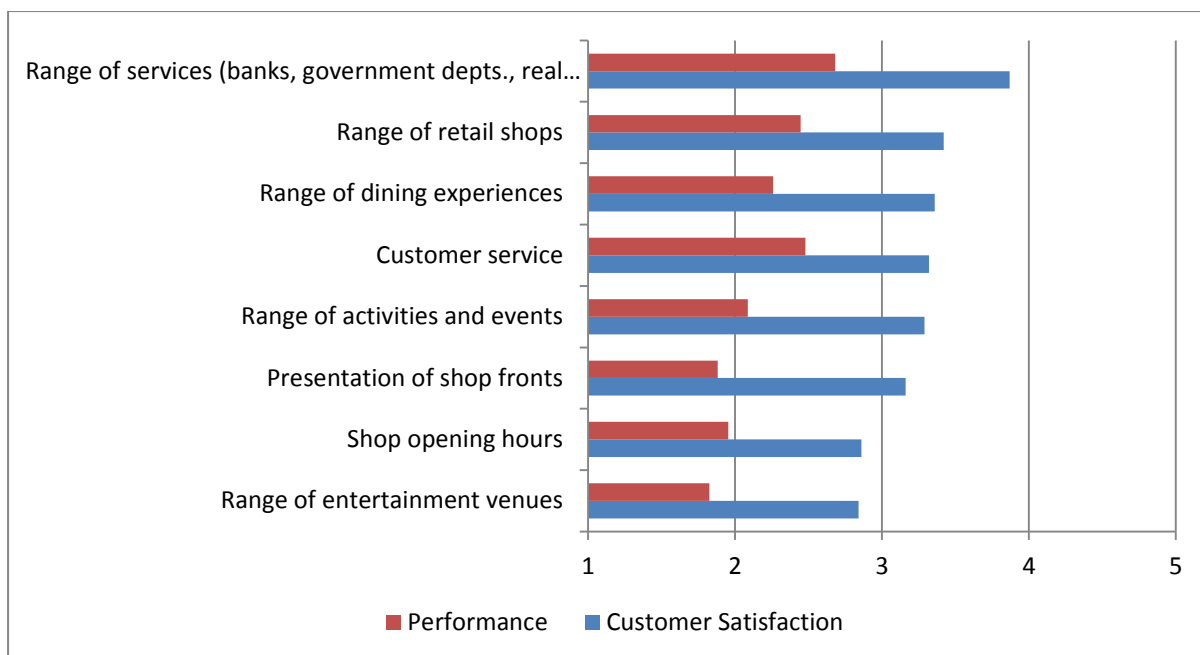


Figure 2: Customer satisfaction and businesses weighted performance of shopping and service facilities

Public: 1=Very dissatisfied; 5 Very satisfied Business 1=Poor performance; 5=Excellent performance

10.3. Perception of Lismore's CBD public spaces by business operators

Generally the rating of public space services is much lower than the rating of shopping and services facilities. There were not public space services where more than 10% of respondents rated them as excellent, most responses were in the fair to good range. The majority of respondents found the presentation and availability of parks and public spaces, daytime security and footpaths in the CBD area were rated good or very good. Signage in the CBD, availability of parking, cleanliness, visual attractiveness and facilities for the disabled were considered fair or good by the majority. Night time security, cleanliness of public toilets and availability of public toilets were all scored poor or fair by the majority of respondents.

Business respondents rated the public space services highly and in some cases they were rated higher than some of the shopping and service facilities. The most important public space services were night time security, cleanliness of public toilets, availability of parking, cleanliness of the CBD area and availability of public toilets. Each of these items had over 50% of respondents scoring the item very important. Visual attractiveness of the CBD area, presentation and availability of parks and public spaces were considered either important or very important while Footpaths, facilities for disabled people, daytime security and CBD signage were all ranked important.

10.3.1. Gap between performance and public satisfaction levels

A strong relationship was found between the public space services measure from business respondents and public satisfaction for the corresponding services ($r=.82$) indicating some consistency in opinions about the public space services between the two groups. An analysis of the results presented in Figure 3 however suggests there are some differences between individual items that are worth noting. While the public are generally satisfied with the first eight items, business respondents indicated performance on some of these items was worse than others. In particular performance for daytime security, CBD signage and visual attractiveness are scored low by businesses. This may be because business operators are more familiar with issues relating to these items than the public.

There was consistency between the two groups for the remaining four items; facilities for the disabled, night time security, cleanliness of public toilets and availability of public toilets. The results suggest that efforts could be made to improve these services.

Table 36: Extent public space services meet the community needs

Question	Poor	Fair	Good	Very Good	Excellent	Mean N=96
Presentation of parks and public spaces	5.21%	28.13%	37.50%	22.92%	6.25%	2.97
Availability of parks and public spaces	6.25%	23.96%	45.83%	14.58%	9.38%	2.97
Daytime security	12.50%	29.17%	38.54%	17.71%	2.08%	2.68
Footpaths in the CBD area	16.67%	19.79%	48.96%	11.46%	3.13%	2.65
Signage in the CBD	12.50%	39.58%	36.46%	8.33%	3.13%	2.50
Availability of Parking	20.83%	30.21%	33.33%	11.46%	4.17%	2.48
Cleanliness of CBD area	21.88%	25.00%	40.63%	10.42%	2.08%	2.46
Visual attractiveness of CBD area	15.63%	38.54%	33.33%	11.46%	1.04%	2.44
Facilities for disabled people	12.50%	50.00%	31.25%	5.21%	1.04%	2.32
Night time security	25.00%	46.88%	19.79%	7.29%	1.04%	2.13
Cleanliness of public toilets	35.42%	39.58%	18.75%	6.25%	0.00%	1.96
Availability of public toilets	64.58%	23.96%	9.38%	1.04%	1.04%	1.50

Table 37: Importance of public space services

Question	Very Un- important	Un- important	Neutral	Important	Very Important	Mean N=96
Night time security	2.08%	0.00%	8.33%	30.21%	59.38%	4.45
Cleanliness of public toilets	2.08%	0.00%	8.33%	33.33%	56.25%	4.42
Availability of Parking	2.08%	0.00%	8.33%	35.42%	54.17%	4.40
Cleanliness of CBD area	2.08%	0.00%	6.25%	41.67%	50.00%	4.38
Availability of public toilets	2.08%	0.00%	14.58%	33.33%	50.00%	4.29
Visual attractiveness of CBD area	2.08%	0.00%	10.42%	47.92%	39.58%	4.23
Presentation of parks and public spaces	2.08%	0.00%	14.58%	41.67%	41.67%	4.21
Availability of parks and public spaces	2.08%	0.00%	16.67%	41.67%	39.58%	4.17
Footpaths in the CBD area	2.08%	2.08%	13.54%	51.04%	31.25%	4.07
Facilities for disabled people	2.08%	0.00%	21.88%	41.67%	34.38%	4.06
Daytime security	3.13%	1.04%	18.75%	46.88%	30.21%	4.00
Signage in the CBD	2.08%	1.04%	19.79%	53.13%	23.96%	3.96

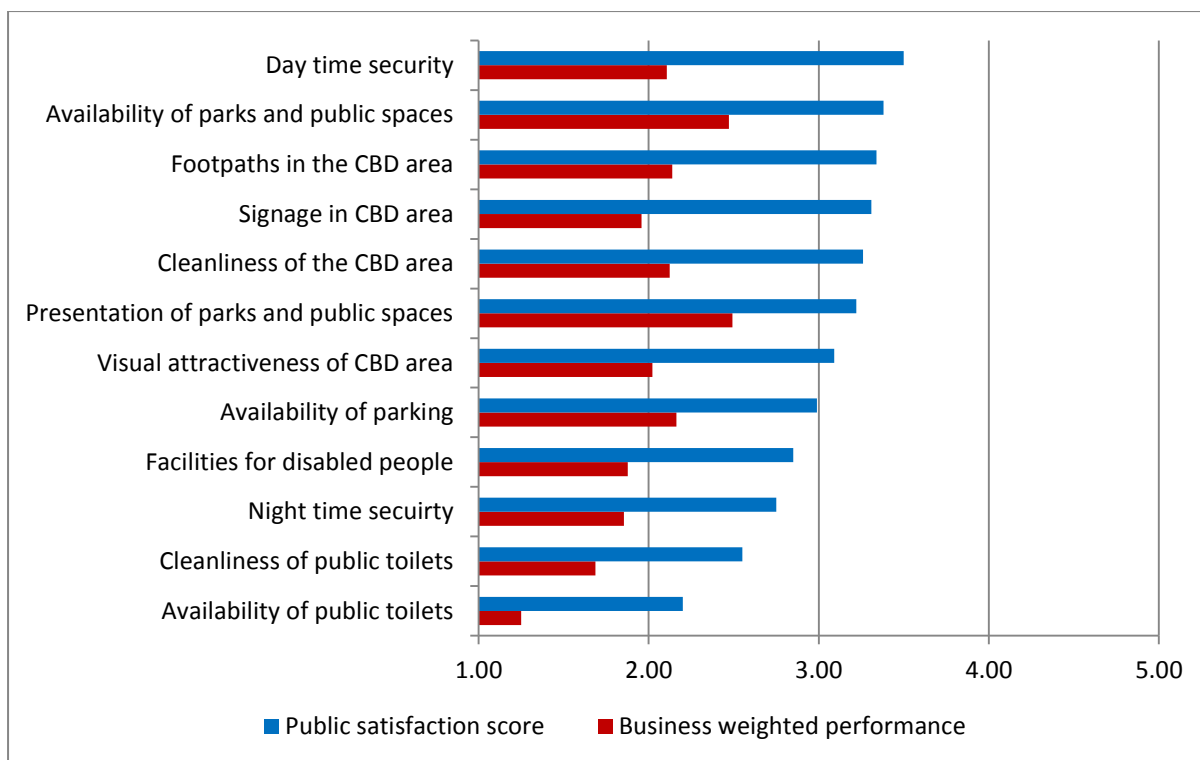


Figure 3: Customer satisfaction and businesses weighted performance of public space services

Public: 1=Very dissatisfied; 5 Very satisfied Businesses 1=Poor; 5=excellent

10.4. Overall satisfaction with the Lismore CBD

Two overall measures of satisfaction were obtained from business respondents (Table 38). The results indicate that business operators were either neutral or satisfied with the overall shopping service facilities in the CBD, although there is a relatively large group of dissatisfied and very dissatisfied business operators (21%).

In relation to overall satisfaction with communication and being informed about what's happening in the CBD, business respondents were less satisfied although the majority indicated they were neutral or satisfied. Again there was a relatively large group who indicated they were either dissatisfied or very dissatisfied (33%). It would appear that more could be done to improve communications to business operators on activities and events happening in the CBD. While business respondents were not asked detailed questions about communication, further understanding of this issue appears important. It is unclear whether the responses relate to dissatisfaction with the means of communication, the detail of information or both. It is possible that current efforts to contact businesses using electronic means may not be the most effective, although those who completed the survey had responded to email requests. In interviews with the City Centre Manager and LBP

Panel members it was noted that many businesses did not respond to emails. Alternative means of communication may need to be considered such as SMS or hard copy/mail. The panel may also need to review the level and content of communication from the City Centre Manager's office.

Table 38: Satisfaction with the Lismore City Centre (CBD)

Question	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Mean N=96
Overall shopping and service facilities of the Lismore City Centre (CBD)?	3.13%	17.71%	38.54%	35.42%	5.21%	3.22
Being informed about what's happening in the CBD	10.42%	22.92%	33.33%	31.25%	2.08%	2.92

10.5. Perceptions of improvement in the CBD over the past 2 years

There was general agreement from business respondents that the CBD had improved over the past two years with 48% agreeing or strongly agreeing. There was also a relatively large group who disagreed (32%). Business respondents were neutral about whether the CBD was more attractive to shoppers and tended to disagree as to whether they have seen their business improve ($x = 2.94$). They also disagreed that the CBD is more attractive to other businesses.

The responses to these questions indicate a split in the opinions of respondents with around one-third of respondents disagreeing that an improvement had occurred in the CBD over the past two years. Analysis of respondents who indicated they were members of the Lismore Chamber of Commerce compared to non-members revealed significant differences in the way the two groups answered the questions. The Chamber members had lower scores for each of the questions and significantly lower for whether the CBD 'Has improved' and 'I have seen my business improve'. Non-members indicated that the CBD 'Had improved', 'Is more attractive to shoppers' and 'Is more attractive for other businesses'. The results are presented in Table 39 and show Chamber members had lower mean scores than non-members. They did not agree that they had seen their business improve.

The results suggest that greater consultation and discussions between the LCOC and LBP Panel could be beneficial in understanding perceived differences between members and non-members.

Table 39: Perception of development of Lismore City Centre (CBD) in the past 2 years

Question	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean N=96
Has improved	6.25%	26.04%	19.79%	39.58%	8.33%	3.18
Is more attractive to shoppers	7.29%	27.08%	25.00%	35.42%	5.21%	3.04
I have seen my business improve	9.38%	18.75%	43.75%	25.00%	3.13%	2.94
Is more attractive for other businesses	11.46%	26.04%	34.38%	23.96%	4.17%	2.83

Table 40: Comparison of Lismore Chamber members and non-members on development of the Lismore City Centre (CBD) over the past 2 years

Question	Chamber Members Mean N=27	Non-Chamber Members Mean N=62	All Mean N=96
Has improved	2.81	3.31*	3.18
Is more attractive to shoppers	2.85	3.10	3.04
I have seen my business improve	2.44	2.97**	2.94
Is more attractive for other businesses	2.81	3.02	2.83

*Significantly different at 0.10 level; ** Significantly different at 0.05 level

10.6. Awareness and involvement of businesses in LBP Program -organised activities and events

Businesses were asked to indicate their awareness of and whether they attended a number of LBP Program organised activities and events. The results are presented in Table 41.

Awareness of most major annual festivals and events was relatively high. The Lismore Lantern Parade and North Coast National were the most known and attended events amongst respondents, whereas respondents were less aware of the events Carols by Candlelight and NAIDOC Week.

Awareness was also high for most of the City Centre entertainment activities, particularly the 'Truck Pull' and 'Summerland Classic Cars', however attendance was relatively low.

The Lismore Produce Markets and Twilight Markets are the most heard of and attended monthly or weekly activities by business respondents. The Conservatorium's concerts and markets also had relatively high awareness but lower attendance.

The community events did not have high awareness or attendance – 'Our Kids Samson Challenge' being the exception with 30% awareness and 7% attendance.

There was high awareness of a number of arts and cultural activities. The Lismore 'Art in the Heart' Project and Lismore 'Back Alley Gallery' had 77% and 75% awareness respectively while the other activities had awareness below 36% and 10% attendance.

Among the retail promotions and seminars there was high awareness for all the items with the exception of the Stella Network which was targeted toward women. Attendance to each of the activities was relatively high, particularly the retail promotions.

The sporting events also had good awareness although attendance was low.

Table 41: Awareness of LBP Program promotional activities

Activity	I heard about it	I went to it
Annual Major Festivals and Events		
Lismore Lantern Parade	97.9%	60.0%
North Coast National (Lismore Show) 2012	94.7%	32.6%
Lismore Turf Club Cup Day	93.7%	16.8%
Tropical Fruits New Years Party	92.6%	7.4%
Carols by Candlelight	81.1%	20.0%
NAIDOC Week 2012	70.5%	9.5%
City Centre Entertainment		
Lismore Festival of Fitness – Truck Pull	72.6%	10.5%
Queer Fruits Film Festival	37.9%	6.3%
NORPA Little Big Shots	28.4%	5.3%
Summerland Classic Cars 2011	46.3%	13.7%
Lismore Yarn Guerrillas Yarn Bombing	35.8%	11.6%
Monthly or Weekly Activities		
Northern Rivers Conservatorium 'CONcerts'	49.5%	15.8%
Lismore Produce Markets	88.4%	32.6%
Lismore Twilight Markets	82.1%	35.8%
CONartists' Market	45.3%	14.7%
Community Events		
Family Fun in the Sun Day	12.6%	0.0%
Our Kids Samson Challenge	30.5%	7.4%
In Good Company	10.5%	3.2%
Arts and Cultural Activities		
The Back Alley Gallery	74.7%	34.7%
Lismore Art in the Heart Project	76.8%	31.6%
NORPA Namatjira	35.8%	10.5%

Peggy Pop Arts ChARTered Tours (Lismore Regional Gallery)	20.0%	6.3%
NORPA Open House	21.1%	6.3%
Retail Promotions and Seminars		
Lismore Chamber of Commerce tri-series seminars	45.3%	8.4%
The Stella Network presents Jodie Fox of Shoes of Prey & Sneaking Duck	33.7%	6.3%
Lismore Stocktake Sale Weekend 2012	82.1%	34.7%
Lismore Christmas Shopping promotion 2011	75.8%	41.1%
Mother's Day 2012	59.0%	21.1%
Sporting Events		
Lismore Masters Games	82.1%	11.6%
2012 Northern University Games	60.0%	3.2%
V8 Dirt Modified	41.1%	6.3%
Respondents	95	95

10.7. Participation in LBP Program activities by Businesses

While awareness of the LBP Program activities was high among business operators for many events the level of involvement was low to negligible. Business respondents were asked to indicate whether they undertook any promotional activity such as advertising, sponsorship, shop decoration or provided discounts, increased trading hours or increased staffing for each of the activities. The results are provided in Table 42.

The table highlights most activities did not increase additional participation by businesses but where this did occur it was in support through advertising and in-store promotions. The Lismore Lantern Parade, North Coast National, Lismore Stocktake Sale Weekend 2012 and Lismore Christmas Shopping promotion 2011 engaged businesses the most. They resulted in advertising, discounted products, increased staffing and opening hours for these events. Of the other activities, involvement was mainly through advertising, sponsorship or shop decoration.

The LBP Panel could consider strategies to increase business' involvement in events through earlier engagement, the distribution of in-store promotions and prizes or award for major promotional activities.

Table 42: Number of businesses participating in LBP Program promotional activities

Activity	Did not participate	Advertising, Sponsorship or Shop / Premises decoration	Discounted Products or Services	Increased Opening Hours	Increased Staffing for Event
Annual Major Festivals and Events					
Lismore Lantern Parade	65	23	0	5	8
North Coast National (Lismore Show) 2012	77	13	1	1	7
Lismore Turf Club Cup Day	83	4	0	2	3
Tropical Fruits New Years Party	79	8	1	2	3
Carols by Candlelight	85	5	1	0	3
NAIDOC Week 2012	80	9	0	0	4
City Centre Entertainment					
Lismore Festival of Fitness	86	4	1	1	2
Queer Fruits Film Festival	85	5	0	0	0
NORPA Little Big Shots	88	2	0	0	0
Summerland Classic Cars 2011	88	3	1	0	1
Lismore Yam Guerrillas Yam Bombing	87	4	0	0	0
Monthly or Weekly attractions					
Northern Rivers Conservatorium 'CONcerts'	86	4	0	1	0
Lismore Produce Markets	81	6	0	4	2
Lismore Twilight Markets	87	3	0	1	0
CONartists' Market	87	3	0	0	0
Community Events					
Family Fun in the Sun Day	90	1	0	0	1
Our Kids Samson Challenge	88	3	0	0	0

In Good Company	88	3	0	0	0
Arts and Cultural Activities					
The Back Alley Gallery	82	9	0	0	1
Lismore 'Art in the Heart'	83	7	0	0	1
NORPA Namatjira	86	4	1	0	0
Peggy Pop Arts ChARTered Tours (Lismore Gallery)	87	4	0	0	1
NORPA Open House	87	4	0	0	0
Retail promotions and seminars					
Lismore Chamber of Commerce tri-series seminars	84	6	1	0	0
The Stella Network presents Jodie Fox of Shoes of Prey & Sneaking Duck	87	4	0	0	0
Lismore Stocktake Sale Weekend 2012	65	13	20	15	6
Lismore Christmas Shopping promotion 2011	68	13	15	15	8
NORPA Open House	86	4	0	0	0
Sporting Events					
Lismore Masters Games	80	7	3	1	4
2012 University Games	84	5	1	1	3
V8 Dirt Modified	89	2	1	0	0

10.8. Business' perception of promotional activity success

Business respondents were asked a number of questions concerning the success of the promotional activity undertaken as part of the LBP Program. The results suggest that the activity did increase the number of visitors to the CBD (36% agreed or strongly agreed) although there was a high proportion of neutral respondents (45%). Of the remaining questions there tended to be neutral responses or

disagreement. Business respondents did not agree 'Coordination of the promotions was good', 'My business turnover increased during the promotions' or that 'The promotions were relevant for my customers'.

The responses suggest that the promotional activity increased visitor traffic but that businesses were not able to utilise the promotions to increase their retail turnover. Stronger coordination of activities to ensure retailers can prepare store displays and merchandising relating to the promotion could be implemented. Further, professional development and retailer workshops to encourage the recording and monitoring of sales records would allow business operators to more accurately evaluate the promotional efforts.

Table 43: Perception of promotional activities and their success

Question	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Mean N=91
There were more visitors to the CBD during promotional campaigns	3.30%	15.38%	45.05%	32.97%	3.30%	3.18
Coordination of the promotions was good	9.89%	16.48%	50.55%	19.78%	3.30%	2.90
My business turnover increased during the promotions	8.79%	25.27%	52.75%	12.09%	1.10%	2.71
The promotions were relevant for my customers	13.19%	20.88%	52.75%	12.09%	1.10%	2.67

A range of business promotions were canvassed among the businesses respondents to obtain feedback on potential future promotional activity. Responses were collected on a sliding scale where the appropriateness of each promotional activity was indicated from Very Inappropriate = 1 through to Very Appropriate = 100. The minimum, maximum and average value for each promotional activity is presented in Table 44 which is sorted from the highest to lowest average value.

Respondents found that making the city more visually appealing was the most appropriate initiative to attract more visitors to Lismore CBD. This was followed by involving more business in promotions and be more effective in promoting shopping campaigns. Providing an incentive, for example a car or vouchers received the lowest value of the promotional options.

Business provided a number of other suggestions that could also be considered (see Table 45).

Table 44: Perception of appropriateness of ways to encourage visitors to the Lismore City Centre

Answer	Min Value	Max Value	Average Value
Make the City Centre more visually appealing	11.0	100.0	83.2
Involve more businesses in the promotions	4.0	100.0	78.3
Promote and market the shopping campaigns more effectively	7.0	100.0	76.5
Provide free car parking during promotion period	0.0	100.0	74.8
Increase umbrella advertising in the most cost effective media	13.0	100.0	73.0
Create more draw card activities during the promotions	8.0	100.0	71.1
Provide more variety in the type of retail stores	12.0	100.0	68.2
Extend shopping hours during sale periods	0.0	100.0	67.7
Provide an incentive e.g. car, shopping vouchers	0.0	100.0	58.8

Table 45: Other promotional activity suggestions

What other promotional activities should be considered
Entertainment
More late night activity
Spring Festival
Pensioner day/ afternoon twice monthly at participating shops, discounts on production of age pension
Improved customer service
Knock and drop (flyer delivery)
Big name events (majors) such as A-league, trade expos, major artists, etc.
Better inform businesses not in CBD square.
Shop local campaign
Musical events
Announcements over the speakers for promos
Get more people to live in Lismore
Radio and TV advertising
Need a signature event
e-marketing

10.9. Awareness of ‘Come to the Heart’ branding

Awareness of the ‘Come to the Heart’ brand and successive media campaigns was high with 70% of respondents being able to recall the branding. This is comparable to the proportion of correct responses from the public survey. There were three incorrect responses and just over one-quarter of respondents who did not complete the question or said they didn’t know.





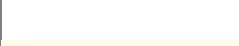


Business respondents indicated they had seen the branding in advertising on TV, in newspapers, tourist information and in stores but only 12% indicated they had used it in their promotion.

While the awareness of the brand was high, it was surprising that the recall from businesses was not higher than the public generally. It would appear the branding message has not been accepted by all businesses and further work is needed in having the branding adopted. The results suggest more engagement with the branding among businesses is necessary.

Table 46: Awareness of the advertising message / slogan / logo used to promote Lismore

Statistic	Value	
Come to the heart/response with the word Heart	63	69.2%
Incorrect response	3	3.3%
Did not respond or didn't know	24	26.4%
Total Responses	91	100.0%

Table 47: Awareness of the Lismore Branding

Answer		Count	%
Yes, I use it in my promotion		11	12%
Yes, in TV advertising		63	69%
Yes, in newspaper advertising		67	74%
Yes, in tourist information about Lismore		55	60%
Yes, in stores		45	49%
Yes, but not sure where I have seen it		9	10%
No, have not seen or heard of it		2	2%

10.10. Perceptions of Lismore's vitality

Table 48 presents the results from a series of questions relating to Lismore CBD's vitality. Only one item had a score above the scale's mid-point (3) with a further three items having mean scores of three, or just below. The mean overall score for the scale is 2.94 which is below the scale midpoint. The results indicate business respondents do not believe Lismore's CBD has vitality. This score can be compared to the public's perception that was positive, although weak.

The LBP Panel could consider strategies to reverse this negative opinion among business operators as a negative mood may flow through to customers and be self-perpetuating. Activities and

initiatives that highlighted the positives about the CBD and successes among businesses could be circulated to businesses on a regular basis.

Table 48: Perception of the Lismore City Centre (CBD)

Question	1	2	3	4	5	Mean N=91
Repels me: Attracts me	5.49%	12.09%	43.96%	29.67%	8.79%	3.24
Does not have Vitality: Has Vitality	8.79%	23.08%	37.36%	20.88%	9.89%	3.00
Lifeless: Alive	8.79%	21.98%	38.46%	23.08%	7.69%	2.99
Lethargic: Spirited	8.79%	24.18%	38.46%	18.68%	9.89%	2.97
Sluggish: Energetic	9.89%	28.57%	38.46%	19.78%	3.30%	2.78
Weary: Alert	12.09%	30.77%	40.66%	13.19%	3.30%	2.65
Overall Scale						2.94

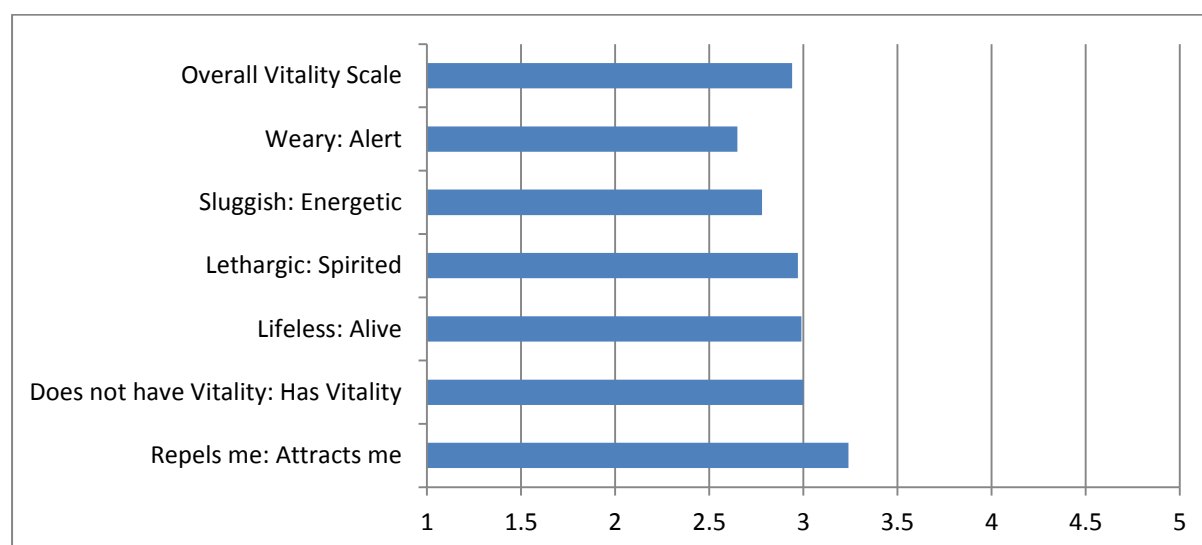


Figure 4: Graph of Vitality Scale Elements

10.11. Awareness of LBP Panel and City Centre Manager role

Just over half the business respondents indicated they had heard of the Lismore Business Promotion Panel. This appears high given the Panel members do not actively promote themselves. By contrast awareness of the City Centre Manager was very high at 80%. An analysis of the location of respondents who indicated they were not aware of the City Centre Manager did not identify any

difference between areas. There were people from within Lismore and out of Lismore who were not aware of the role.

As with Lismore's CBD branding, further work is necessary to raise awareness of the City Centre Manager role. This is reiterated in business respondents results for satisfaction with activities undertaken by the LBP Program presented in Table 50.

The results indicate that business respondents are satisfied with the CBD branding however all the other items had a mean score below the mid-point and a high proportion of respondents had indicated they were neutral in relation to the items. There was most dissatisfaction with 'Support for the local business community' (45% dissatisfied or very dissatisfied) and 'Enhancing the capabilities of local businesses' (47% dissatisfied or very dissatisfied).

Table 49: Awareness of LBP Panel and City Centre Manager

Question	Yes	No	Count
Have you heard of the Lismore Business Promotions Panel (or LBPP)?	53.85%	46.15%	91
Did you know Lismore has a City Centre Manager?	79.12%	20.88%	91

Table 50: Satisfaction with activities undertaken by the LBP Program

Question	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Mean = 91
Branding of Lismore	4.40%	18.68%	35.16%	34.07%	7.69%	3.22
Calendar of events	8.79%	16.48%	47.25%	21.98%	5.49%	2.99
Promotion of Lismore as a shopping centre	8.79%	23.08%	36.26%	27.47%	4.40%	2.96
Beautification of the City Centre	14.29%	21.98%	42.86%	18.68%	2.20%	2.73
Activities of City Centre Manager	17.58%	20.88%	38.46%	18.68%	4.40%	2.71
Support for the local business community	17.58%	27.47%	31.87%	20.88%	2.20%	2.63
Enhancing the capabilities of local businesses	14.29%	32.97%	35.16%	16.48%	1.10%	2.57

10.12. Continuation of the Special Business Rate Variation Levy (SBRVL)

While the above tables indicate some dissatisfaction with the activities undertaken by the LBP Program it appears that there is broad support for the continuation of the additional funding to support the LBP Program activities. 73% of business respondents indicated they agreed to continue the Levy.

The result provides support for the continuation of the program and recognition by the business respondents that the CBD branding and events calendar has been a positive output for the CBD.

In terms of the future allocation of resources business respondents indicated it should be allocated on the basis of eighty per cent split between of marketing/advertising, events and place development and the final 20% split between business and community activities, including out of city activities, and a contingency fund (see Table 52).

Table 51: Agreement to the continuation of the SBRVL beyond June 2013

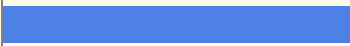

Answer		Count	%
Yes, agree		65	73%
No, disagree		24	27%
Total		89	100%

Table 52: Perception of appropriate fund allocation to support Lismore Business

Answer	Min Value	Max Value	Average Value
Marketing/Advertising	0.00	80.00	27.87
Events	0.00	70.00	25.70
Place (Ambience / Events / Activities)	0.00	100.00	25.68
Business & Community (Groups & out of city activities)	0.00	100.00	12.55
Contingency funds	0.00	100.00	8.74

10.13. Other Input from Business Respondents

There were 37 business respondents who provided other comments. These were summarised into 18 themes. Most of the comments related to the LBP Program and/or Panel and either suggested the LBP Program be expanded or broadened to include other businesses or other business areas. Some were critical of the LBP Panel indicating they were not aware of the peak business group and how it worked. There was also concern raised about the SBRVL and the equity of its application. Businesses were also critical of the frequency of communications emanating from either the LBP Program or City Centre Manager and highlighted how businesses often were not consulted or made aware of promotions in time to make preparations or be involved in the activity. A number of business ideas and suggestions were provided with potential for new promotional concepts that could be developed in the future. Infrastructure was also mentioned a number of times, raising

concerns about roads and facilities in the CBD. These ideas flowed into parking, the City's attractiveness and level of security. There were also supportive comments for the Levy and work that had been done around the CBD provided by a number of operators. A number of other diverse comments were provided about unrelated topics. Full details of the comments are included in Appendix 2.

Table 53: Other Comments

Comment's theme	Number of comments
Broaden LBP Program/Panel	10
Business Levy	4
Communication	4
Infrastructure	3
City Centre Manager	3
Supportive	3
Collaboration/ Other Business opportunities	2
Lismore's Visual Image	2
Parking	2
City Attractions	2
Economic development	1
Council	1
Security	1
Survey	1
Business coaching	1
Transport	1
Lismore Square	1
Opening Hours	1

10.14. Who completed the Business Survey - characteristics of respondents?

The Business Survey was completed using the same methodology employed in the public survey. This was an online survey methodology and it is acknowledged that the sample may not be representative of all Lismore business operators, however this was not the objective of the study; the focus was on obtaining the views and opinions from a broad cross section of the business community. This section provides descriptive information on the sample to demonstrate the characteristics of the sample thus providing the context for the responses obtained in the survey feedback.

The sample consisted of 95 usable responses, which, for this type of study is considered very good and is an adequate size to undertake statistical analysis and obtain a broad view of opinions across the business community. The descriptive results below indicate the sample represented a wide range of business operation types and industries that operated across the Lismore City Council area. They employed, on average, 5.7 full-time staff and 4.5 part-time staff.

The sample had roughly equal proportions of males and females with a broad distribution of ages. There were over 15 respondents from age groups covering people in their 30's, 40's, 50's and 60's and the businesses had been operating an average of 12.6 years. There was good representation from businesses that had been operating from a relatively short time (less than 4 years) through to those operating in excess of 20 years.

Almost one-third (30%) of respondents indicated they were members of the Lismore Chamber of Commerce.

Based on the summary data the sample is considered to be broadly representative of a wide range of business respondents and captures a diverse range of views and opinions with no single group dominating the sample.

Table 54: Gender



Answer		Count	%
Female		45	51%
Male		44	49%
Total		89	100%

Table 55: Age Group








Answer		Count	%
18 -19		1	1%
20-29		3	3%
30-39		17	19%
40-49		24	27%
50-59		27	30%
60-69		16	18%
70 and over		1	1%
Total		89	100%

Table 56: Suburb

















#	Answer		Count	%
2	East Lismore		6	7%
3	Girards Hill		3	4%
4	Goonellabah		15	18%
6	Lismore		37	44%
7	Lismore Heights		3	4%
9	North Lismore		3	4%
10	South Lismore		5	6%
12	Nimbin		3	4%
14	Bexhill		1	1%
20	Caniaba		2	2%
31	Jiggi		1	1%
38	Lindendale		1	1%
46	Richmond Hill		1	1%
53	The Channon		2	2%
56	Tuckurimba		1	1%
62	Wyrallah		1	1%
	Total		85	100%

Table 57: Years of operation of own Business

Statistic	Value
Total Responses	89
0-4 years	27.3%
5-9 years	20.5%
10-19 years	23.9%
20 or more years	28.4%
Mean Number of years	12.6 years

Table 58: Membership at Lismore Chamber of Commerce



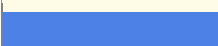







Answer		Count	%
Yes		27	30%
No		62	70%
Total		89	100%

Table 59: Industry

Answer		Count	%
Retail shop/outlet		40	45%
Professional offices		21	24%
Wholesale outlet		3	3%
Home operated business		10	11%
Market operated business		1	1%
Restaurant / Cafe		3	3%
Other (please specify)*		9	10%
Manufacturing Outlet / Industrial		2	2%
Total		89	100%

* Included Motel/Hotel accommodation and other service operations.

Table 60: Primary business activity

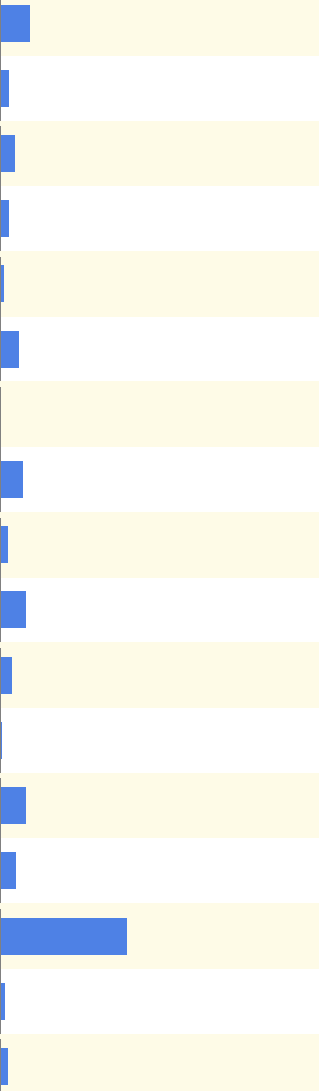
Answer		Count	%
Accommodation, Cafes and Restaurants		8	9%
Agriculture, Forestry and Fishing		2	2%
Communication Services		4	4%
Construction		2	2%
Cultural and Recreational Services		1	1%
Education		5	6%
Electricity, Gas and Water Supply		0	0%
Finance and Insurance		6	7%
Government Administration and Defence		2	2%
Health and Community Services		7	8%
Manufacturing		3	3%
Mining		0	0%
Personal and Other Services		7	8%
Property and Business Services		4	4%
Retail Trade		35	39%
Transport and Storage		1	1%
Wholesale Trade		2	2%
Total		89	100%

Table 61: Full time employees

Statistic	Value
Total Responses	87
0-4 Employees	73.6%
5-9 Employees	14.9%
10 or more Employees	11.5%
Mean number of full time employees	5.7 years

Table 62: Part time staff

Statistic	Value
Total Responses	88
0-4 Employees	76.1%
5-9 Employees	10.2%
10 or more Employees	13.6%
Mean number of part time employees	4.5 years

11. Bibliography

- Aelbrecht, P. S. (2010). Rethinking urban design for a changing public life. *Journal of Place Management and Development*, 3(2), 113-129.
- Association of Town Centre Management. (n.d.). ATCM Healthcheck.
- Balsas, C. J. L. (2004). Measuring the Liveability of an Urban Centre: An Exploratory Study of Key Performance Indicators. *Planning, Practice & Research*, 19(1), 101-110.
- Balsas, C. J. L. (2007). City Centre Revitalization in Portugal: A Study of Lisbon and Porto *Journal of Urban Design*, 12(2), 231 - 259.
- Biddulph, M. (2011). Urban design, regeneration and the entrepreneurial city. *Progress in Planning*, 76, 63-103.
- Burns, E. A., & Willis, E. (2011). Empty shops in Australian regional towns as an index of rural wellbeing. *Rural Society*, 21(1), 21-31.
- Coca-Stefaniak, J. A., Parker, C., Quin, S., Rinaldi, R., & Byrom, J. (2009). Town centre management models: A European perspective. *Cities*, 26, 74-80.
- Coca-Stefaniaka, A., Hallsworthb, A. G., Parkera, C., Bainbridgea, S., & Yustec, R. (2005). Decline in the British small shop independent retail sector: exploring European parallels *Journal of Retailing and Consumer Services*, 12, 357-371.
- Cook, I. R. (2009). Private sector involvement in urban governance: the case of Business Improvement Districts and Town Centre Management partnerships in England. *Geoforum*, 40, 930-940.
- Davies, M. S. (1997). Business Improvement Districts. *Urban Law Annual ; Journal of Urban and Contemporary Law*, 52.
- De Nisco, A., Riviezzo, A., & Napolitano, M. R. (2008). The role of stakeholders in town centre management: guidelines for identification and analysis. *Journal of Place Management and Development*, 1(2), 166-176.
- Diamond, J. (2002). Strategies to resolve conflict in partnerships: Reflections on UK urban regeneration. *The International Journal of Public Sector Management*, 15(4/5).
- Forsberg, H., Medway, D., & Warnaby, G. (1999). Town centre management by co-operation Evidence from Sweden. *Cities*, 16(5), 315-322.
- Hogg, S., Medway, D., & Warnaby, G. (2001). Towards a Typology of Marketing Town Centre Management Schemes through the use of KPIs: Manchester Metropolitan University Business School Working Paper Series.
- Hoyt, L., & Gopal-Agge, D. (2007). The Business Improvement District Model: A Balanced Review of Contemporary Debates. *Geography Compass*, 4(1), 946-958.
- Johnson, J., Thompson, A., & Naugle, K. (2009). Place-conscious capacity-building: a systemic model for the revitalisation and renewal of rural schools and communities

- through university-based regional stewardship. *Rural Society*, 19(2), 178-188.
- Kennedy, M. (Ed.). (2011). *Binding a Sustainable Future: Book towns, themed place-branding and rural renewal; A Case Study of Clunes 'Back to Booktown'*. Ballarat, Australia: Victorian Universities Regional Research Network Press.
- Kilpatrick, S., Vitartas, P., Homisan, M. & Johns, S. (2011) "Optimising the Benefits of the Highly Skilled, but Mobile Workforce: What can Country Towns Do?" in John Martin and Trevor Budge (eds) *The Sustainability of Australia's Country Town: Renewal, Renaissance, Resilience*. Victorian Universities Regional Research Network Press, Ballarat, Australia.
- Levy, P. R., Gibson, S., Kozloff, H., Levin, J. R., Remetis, K., & Spink, F. H. (n.d.). *Business Improvement Districts* (Vol. 2).
- McAteer, B., & Stephens, S. (2011). Town Centre Management: A solution to the challenges facing urban centres in Ireland? *Journal of Place Management and Development*, 4(3).
- McHenry, J. A. (2009). A place for the arts in rural revitalisation and the social wellbeing of Australian rural communities. *Rural Society*. 19(1), 60-70.
- McManus, P., Walmsley, J., Argent, N., Baum, S., Bourke, L., Martin, J., Sorensen, T. (2012). Rural Community and Rural Resilience: What is important to farmers in keeping their country towns alive? *Journal of Rural Studies*, 28(20-29).
- Medojevic, J., Milosavljevic, S., & Punisic, M. (2011). Paradigms of rural tourism in Serbia in the function of village revitalisation. *Journal of Studies and Research in Human Geography*.
- Musso, F. (2010). Small retailing, town centres and inland territories: An "extended town centre management" perspective. *Public administration & regional studies*, 2(6).
- Otsuka, N., & Reeve, A. (2007). The contribution and potential of town centre management for regeneration: Shifting its focus from 'management' to 'regeneration'. *TPR*, 78(2).
- Page, S. J., & Hardyman, R. (1996). Place Marketing and Town Centre Management: A new tool for urban revitalization. *Cities*, 13(3).
- Pratt, A. C., & Hutton, T. A. (2012). Reconceptualising the relationship between the creative economy and the city: Learning from the financial crisis. *Cities*.
- Riviezzo, A., de Nisco, A., & Napolitano, M. R. (2009). Importance-performance analysis as a tool in evaluating town centre management effectiveness. *International Journal of Retail and Distribution Management*, 37(9), 748 - 764.
- Stubbs, B., Warnaby, G., & Medway, D. (2002). Marketing at the public/private sector interface; town centre management schemes in the south of England. *Cities*, 19(5), 317-326.
- Sully, S. (2008) *Lismore Alive Final Report*, Planning by Design, Geelong, Victoria.
- The National BIDs Advisory Service. (2012). Fast Facts for BIDs Partners Retrieved 11

November, 2012, from <http://www.ukbids.org/timetable.php>

- Vitartas, P., Kilpatrick, S., Homisan, M. & Johns, S. (2012) "New business operator's contribution to regional areas: innovations, skills, and benefits beyond the store front" in Kinnear, S., Charters, K. & Vitartas, P. (eds) (2012) *Regional Advantage and Innovation: Achieving National Outcomes*. Springer-Verlag: Heidelberg. pp. 305-318.
- Ward, K. (2006). 'Policies in Motion', Urban Management and State Restructuring: The Trans-Local Expansion of Business Improvement Districts. *International Journal of Urban and Regional Research*, 30(1), 54-75.
- Warnaby, G. (2000). Process, content and context considerations influencing the marketing of urban areas as shopping destinations *Working Paper WP00/03*: Manchester Metropolitan University Business School.
- Wright, M. (2000). Town Centre Managers need to justify their funds. *Urban Environment Today*(96).

12. About the Authors

Dr Peter Vitartas BCom MBus, GradCertHEd(L&T), PhD is Deputy Head and a Marketing academic from the Southern Cross Business School. He has taught and undertaken research at Southern Cross University for 20 years in the areas of consumer behaviour, marketing research, and services marketing. Peter has also undertaken consultancies and worked with local businesses and organisations including the Lismore City Council for resident satisfaction and other studies, Richmond Valley Council, National Bank, Southern Cross University and Coffs Harbour City Council. Prior to joining the University, Peter worked in Sydney and London in marketing management positions and his experience included undertaking marketing and consumer research.

Ms Sarah Biersteker BBusTour(Hons), GradCertResMgt is a PhD student at Southern Cross University. She is currently studying the role of clustering and market orientation as strategies in the development of family-based businesses. Sarah is a company director and has over 12 years experience in the coffee industry and across the supply chain. Her involvement with her family's business has given her special insight into the complexities of local businesses and retailing.

13. Appendices

13.1. Appendix 1

Theme(s)	Comments from respondent
Atmosphere	Colour, no smoking, music....buskers are good, murals; more street art and performance all enhance the shopping experience in Lismore.
Atmosphere	The cultural artistic events e.g. Art in the Heart, the galleries, exhibition openings are what attracts me to Lismore
Atmosphere	no smoking rules ignored at outdoor eating venues no smoking laws ignored at bus stops
Beautification	There are far too many vacant shops in Lismore's CBD; this does not look appealing to visitors. There are not enough activities for visitors/tourists and although Lismore was once the shopping and business hub of the north coast, too many tourists are attracted to locations such as Byron Bay with its global reputation but we are not seeing residual tourism from this.
More activities for visitors	
Link to coastal traffic	
Beautification needed	I think the Lismore square and Lismore central shopping areas need to get with the times....they are still very old time....
Beautification needed	Needs a face-lift. This is both the job of the businesses who operate within + the centre manager + the chamber. We need to get some community spirit and optimism amongst the business owners.
Beautification needed	I believe the shops and services in Lismore are very good, but to justify any improvement and further shops we need to encourage people back to the CBD. I think further beautifying Lismore's city centre, with more plants, street sculpture and a lick of paint, would create an environment that people will want to be in, which will then be good for businesses. I wish the Lismore streetscape were a little more like Bangalow - that more were made of the beautiful old buildings and the store signage was smaller and less garish. I am very happy that street dining has been allowed in and embraced by cafe/pub owners. I love the lantern parade (the street party and markets are sensational) the twilight markets, CONmarkets and back art gallery - they make the place feel safer and have a really positive community building effect. More interesting events in the heart which could draw crowds would be fabulous, though I know this is a hard area in terms of getting people to support events. Perhaps working with the Uni, Norpa, the Circus performing school, NCEIA? I believe we need to think about a botanic garden space which is in the heart of Lismore - not near the tip and out of the way. And in this space we could hold events like moonlight cinemas, opera/orchestras in the park, and events for youth. I wish there were an indigenous cultural centre, or just a space for youth to celebrate their own culture, and a healing space.
Parks	
More cultural events	
CBD housing	There should be more above-shop apartments and cheaper rents in the CBD.

Cleanliness	The biggest detractors for Lismore are: Bad road conditions in town, Bad traffic flow, lack of Public Toilets and cleanliness of what there are, parks and gardens look tired, shopping trolleys everywhere looks crap to tourists. Caravan Looks better now could be a whole lot better.
Parks	
Negative	
Roads	
Cleanliness	I live in Lismore but recently my work moved to Ballina. Lismore looks like it needs a good clean compared to Other towns around. The empty shops in CBD are sad.
Cleanliness	I think it is good that this survey is being done; it might get some new thoughts into the promotion of our city, to revitalize it. Lismore needs some new blood injected into it. I think a lot more care can be taken with the appearance of our city, to me it is very dirty, and our parks aren't inviting, I look at other parks in towns like Murwillumbah along the river, and in Grafton, these places looked cared for. The entrances and exits from our city could be kept cleaner and tidier. These are just a few changes I think that would enhance the natural beauty of our city. I think the river that flows through the city is wasted, I think our riverbanks could be better looked after, and utilized.
Parks, public spaces	
Use river more	
Communications	It would be great if there were more community notice boards. This is an important way for events to be promoted in the CBD.
Customer service	Business owners and staff could be a bit more welcoming and happy to see prospective customers and show a positive mind set.
Customer service	We need better customer service.
Disability	Shops are not wheelchair accessible and don't seem to care about fixing the problem. Very unhappy.
Disability issues/access	My major concern is the lack of access in many businesses for people with mobility issues. I would be more likely to attend events if I knew there would be seating available, but am not sufficiently disabled to request for example, disabled seating for the Lantern Parade. Hence I have never attended it. Similarly, the cushion concerts at the Con are inappropriate for older people. It is not easy to carry a chair while using a walking stick. My biggest bugbear is the number of cultural activities at the Star Court theatre, which has no disabled access, and a particularly difficult and steep staircase. Lismore needs another venue, apart from the City Hall, which is often already booked out.
Entertainment	Would be great to see more entertainment during the organised events. Great to see some local musicians gaining some exposure during these events and they added something positive to the atmosphere of the events.
Expand CBD	Feels a bit like the CBD ends at Magellan St. Would be great if something could be done to make it feel like it continued to Conway St. Also making use of all those back alley streets would be great, if that was used in a way where maybe restaurants had big open outdoor areas and there were plants or even the markets continued through there, I think it could change the feel of the CBD and make it more of a funky place to go. Make Lismore CBD the northern outback version of Melbourne!
Atmosphere	

More shade	It has improved greatly over the past few years. Needs more shade (love Magellan St)Service has improved. Footpaths are ugly, and would love to see more outdoor nightlife, people living in the CBD, and use of the River. We don't make enough use of our river...would love a restaurant right over it!
Use river more	
Negative	It is abysmal. I absolutely avoid going into Lismore centre as much as possible.
Negative	Lismore CBD doesn't have the pull for me like it used to, it just feels dead unfortunately. I do love Lismore and this is a shame.
Negative	In the past ten years the spirit of not just Lismore, but the entire Northern Rivers, has died. You think you are offering a cultural experience with all these pretentious events, but in essence the day to day cultural spirit is dead. This used to be a creative town, now it's just 'any' town. I could be in Lismore or I could be out west in Inverell and there is NO difference. You killed your community Lismore... shame on you. I won't be staying to see it fall deeper into the mundane. And shame on you SCU for taking away first the gallery and then the gallery funding for the Visual Arts students, just one more reflection on how beige this town is becoming.
Negative	I see through my work a lot of the businesses and especially the square and council give service contracts to companies outside of Lismore then want locals to support them.....wrong
Negative	As an owner of two businesses in South Lismore, we are very unhappy about the money, including our business rates, being spent on advertising our opposition selling at the two CBD markets. We pay about 5K per year only to have out of town backyard plant sellers rip us off. I have mentioned this to council staff, who quite often agree, but don't do anything about it? The few business owners who have spoken up have been criticized in the media as whingers? The other problem we have is parking in south, there is a karate school near us, and very often there will be hundreds of cars taking up all the car spaces all day, even in 15 and 30 parking areas, we don't get parking rangers over our side. When 4 of us other business owners have mentioned it to them they ignore us. I recently changed plans for our new business because of the parking problems.
Nightlife	It dies at night except for a few dreary pubs
Nightlife	Need more to do at night, better lighting and security at night.
Use river more	Need to make better use of our anyways in the CBD Could do amazing things with our riverbanks in the town i.e.: amphitheatre!
Shopping range	Encourage more outdoor dining. Encourage more upmarket retail instead of horrible cheap junk shops. Use the villages around Lismore by encouraging cafes and gift shops that attract people from out of town.
Café culture	
Nightlife	Dead at night
Parking	Parking is annoying, especially since changing the parking in the main street to only being accessible from one side of the road. But, it's usually worth parking further away to walk, and avoid the traffic.

Parking	There is not enough parking in the CBD and the pedestrian crossing in the main street need lights so the people don't continually cross and hold the traffic up.
Parks	I love the CBD and anything that can be done to improve it would be great. My suggestion is bulldoze Spotlight and the back section of Chandlers and make a grassed town square there with a fountain, toilet, shade and small children's playground. It would connect the block and all arcades would lead on to it. People would go there for lunch time entertainment, sit on the grass, eat their lunch and enjoy the Back Alley Gallery. The Square is awful - fluoro lit clone shops. Truly awful - but it is air-conditioned and that means a lot in summer. The produce markets are the best thing to happen to the CBD. Access in the CBD is poor - too many barriers for people with disability and people with prams/young kids. The CBD is not child friendly.
Shade	
Atmosphere	
Parks (not sport)	Please stop spraying herbicide on footpaths. This is a particular issue for chemically sensitive people and deters them from shopping in the CBD. Lismore needs a park for public recreation that has no connection with sport. The ideal location would be the stretch of land between Lismore Square and the CBD. 'Dumbed down' events such as Australia's Strongest Man risk attracting visitors who are more prone to violence, illegal drug use, and perhaps even crime too. The current strategy to enhance Lismore's vitality via an emphasis on the arts is a very good one. Improving Lismore's aesthetics will have the spin-off effect of keeping creative people in the city who might otherwise move on, Lismore being a relatively transient place. We need more street trees away from the central CBD. Fruit trees would be a very good idea too. Lismore doesn't need any more supermarkets or shopping centres. Supermarkets and shopping centres divert money away from locally owned retail outlets, and cause them to shut down. Shopping at locally owned retail outlets creates more employment per dollar spent than chains. Neighbourhood shops that have been closed for decades need to be re-opened. Perhaps with financial incentives. Our present quality of life is more valuable than increasing Lismore's population for short-sighted economic reasons. If more public transport were available, it might encourage some car drivers to use it. Traffic lights slow down traffic flow and I do not support any more being created. It would be good to have a wider range of environmentally friendly products, e.g. anybody wanted to buy organic cotton clothing will go elsewhere or shop online. Lismore could reflect a stronger sense of civic pride by arranging the repair of broken-down clocks on Molesworth Street and Union Street, with the help of council grants. Retailers and vendors need to work together rather than engaging in fights (e.g. the Saturday Lismore Produce Market on Magellan Street.)
Creative arts	
Trees	
Neighbourhood shops	
Public transport	
Support for markets	
Positive	Love Lismore and can't wait to see more of the Come to the Heart program!

Positive	Lismore, particularly the CBD has undergone such a change over the last couple of years! There is so much more going on in the city, in the region, that makes the city so much more inviting to current residents to stay, former residents to return, and others to visit and keep visiting. My favourite is the Back Alley Gallery - such a wonderful project, that really transcend boundaries in the community. I will keep coming back to Lismore to visit, explore the CBD and region, and of course, visit the Back Alley Gallery.
Positive	The Come to the heart PR person is doing a great job. The Magellan St. Thursday produce market is a great asset to the CBD.
Positive	The area has improved and vitality has been added however I do not choose to go into Lismore often as the parking is awful and the people can be unpleasant. Nothing to do with its activities - there's been some great initiatives over the past 2 years. Bring that enthusiasm to Ballina please.
Parking	
Positive	The promotion of the CBD has been very effective. The Thursday Night Farmers Markets have brought real energy to the streets and make for a great shopping experience. The Back Alley Gallery is a great idea; It's something really unique about Lismore that will put the town on the map.
Positive	I love the Lismore Come to the Heart project. It has increased my visits to the Lismore CBD. Thanks to all involved
Positive	I am really enjoying the heart of Lismore, the CBD. The creativity and positive energy is growing and quite palpable.
Positive	Whoever has been pushing the Come to the Heart campaign is doing a wonderful job for our city.
Positive	Lismore has all I need for retail, business services, recreation, cultural activities and social interactions.
Positive	I really like shopping in the CBD far more than at the Shopping Square because of the access to parking and range of interesting shops the only problem is when you work full time - all of the shops close at 5.00pm and are only open Sat morning therefore I often find I like to shop in the afternoons on Saturday or on a Sunday so I go to the Square. I do understand that the CBD shops would find it difficult to pay wages etc. for Sat afternoon or Sunday trading.
Shopping times	
Public transport	I'd love a tram or bus style service that does the main block. The open top Combi or old style decorated bus. Goes round and round so you can park and ride around town and back to where you started. Great way to move around and talk to other people.
Shade	More trees.....Lismore area is a very hot spot....we do not have access to the cooling coastal breezes of Ballina and Byron...can never have too much shade.
Shopping range	Try and monitor the amount of Hair Dressers and Florists... way too many on one block... open up more 'Pop Up Shops' for Artists to exhibit their art works or for people to just open up a shop for cheapish rent, this would show that the Lismore City Council IS in support of the little guys... and make sure that The Square doesn't advertise their businesses in the CBD.
Shopping range poor	I find that quite a number of the shops do not stock the same range that you would access in metropolitan areas or the gold coast, I find myself shopping online more and more because I can access

whatever I want. Our shopping is limited.

Shopping times	Wish the shops would open longer on Saturdays and Sundays, and have more consistent hours during the week.
Shopping times	CBD opening hours and street appeal are the two main factors for me. The latter includes the lack of simple, clean, contemporary and well-lit display windows/content and sometimes, slightly run-down building appearance. Streetscape is generally ok, though a little dated in choice of materials and design. 'Less is more' when it comes to colour and pattern. More shaded seating areas would be good in Woodlark Street and small 'break-out' public spaces throughout the CBD (like in Magellan Street). Range is limited for some things, like shoes and just general quality goods. Quality may be there (in some stores), but tends to get hidden by clutter. CBD is by far the preferred site accessing shops (including Lismore Central) and businesses due to its pedestrian environment, it's outdoors (not a big box shopping centre) and there is more engagement with some of the local architecture, access to the gallery (when it's open) and outdoor dining.
Cleanliness	
Shade	
Shopping range	
Shopping times	Sunday trade is needed. Sunday is my only day off and everything is closed and the city is dead!
Shopping times	I wish shops had better opening hours, especially on weekends. Late night shopping at the Square is only till 8 and I think that's not enough. Also, after 12 noon on Saturday and all day Sunday, the CBD becomes deserted because the shops close and I think there would be plenty of takers if shops were open for longer. I think people need more to do around here.
Shopping times	Love the slowed down attitude of Lismore but for visitors it would be better if shops could do a whole day Saturday and a half day Sunday... they are probably visiting for the quirky shops but no one is open!
Shopping times– food	Overall I'm very happy with shopping and services in Lismore. However, opening hours on weekends in the CBD could be a lot better, particularly in relation to food outlets. It's so hard to find a cafe open after around 2pm on a Saturday! I believe if more cafes and eateries were open longer on weekends; this would bring more people into the CBD. This in turn would make it more attractive for small businesses to open for longer hours on a weekend, as the foot traffic would exist bringing more shoppers into town.
Space usage	As a professional with hospitality background, Lismore city council needs to look at empty spaces and parks that can be turn into a sustainable entertainment area. Look at the prospect of opening coffee carts or cafes in the river area. Lismore has massive opportunity to be a 'foody' paradise and destination. It has the quality, the space that yet to be developed and promoted. Why is there no reference in this questionnaire to markets specifically - a huge component of commerce and tourism?
Use river more	
Focus on food	
Survey	
Survey	I am an owner operator of a retail shop in Woodlark street & have responded in detail to LBPP survey including photos

Use river more

I think over the last 2yrs the city CBD and activities provided by council have grown and changed how Lismore is seen. All the events are friendly, happy and engaging and more often than not suitable for families - which is a huge bonus. I think there could be more use of down by the river or even peaceful spots for picnics or for people who work either downtown or up the square to have lunchbreaks. I was recently in Inverell and they had fantastic park facilities down by their river, tiered seating for shows or just as steps as well as a fountain in the middle of the river as an attraction.

Note: Comments by respondents which could be considered defamatory or of a personal kind have not been included in this Appendix.

13.2. Appendix 2

Themes	Text Response
Broaden LBPP	As a business owner in (area withheld), we get upset with all the promotion for the C.B.D. and nothing for the other Lismore business areas [South and North]. We pay about \$5K per annum in business rates, to see promotion of markets with people selling same products but not from Lismore? Our rates help pay for advertising of our non-local opposition????? In our case, [competitors] coming in from other regions selling in opposition to us, and not paying their way. 6 years ago we bought our business which had been running for 19 years, we have expanded twice, employed staff, serviced hail, flood, storm, increased markets and Bunnings in the same street. We have done this all off our own bat, no help from council or Come to the Heart etc... When we started there was only one tiny market a week and the carboot once per fortnight, we now have 5-6 per week ????? This is our biggest competition by far. Speaking to other business owners, this is a very strong sentiment by all.
Broaden LBPP	As a retailer we are ignored by the LBPP in favour of clothing shops and cafes, these businesses are not what Lismore is about but they get all the promotion as well as the markets that do not support established retailers.
Broaden LBPP, Other business, opportunities	There are a lot of complementary health services offered throughout the CBD by qualified health professionals, this is another core reason people access the CBD. It would be great if the CBD manager could compile a list of services and professionals and encourage an event to promote this. Could be linked in with the festival of fitness maybe. Use of complimentary and allied health care is huge in the CBD. Remedial Massage Therapists, Chiropractors, Counsellors/psychologists, Pilates instructors, Yoga instructors, Naturopaths, Acupuncturists, could go on to include further allied health care so far as dentists and optometry services. There are a large amount of health professionals - to single out the accredited/qualified professionals all that would be needed is a survey - and detail if the practitioner has membership with a relevant professional association to their industry - and if they have professional indemnity insurance or not. this is how to work out easily if they have the necessary qualifications to be endorsing these practitioners and their services to the public. Question -are you a member of a professional association relevant to your industry - if yes - please list the name of association. Question - Do you have insurance covering Professional indemnity and Public liability. Yes/No. This accounts for a large amount of business conducted in the CBD. Health services are clustered in the CBD, not something that is replicated in the large shopping centres eg. Lismore square. Unique to the CBD. No need to be afraid of endorsing quality health professionals. Leave the choice of which to see for what up to the public, but be sure to let the public know the scale of health services in the CBD. LISMORE ROCKS!! :)
Broaden LBPP	I know the focus is on retail businesses and it needs to be but there are also a lot of other service-based businesses that operate that should be

	included in some activities - for example as sponsors or service providers. It would be nice to be included and our contribution not discounted because we don't have a retail shop front.
Business Levy, Survey Business Levy	No questions about online presence, social media or other online activity? I support the levy - however as a micro business I do not agree with paying the same as a larger business Don't let council rip off businesses who pay the levy for other than it was designed for
Business levy	This rate should be dropped
Business Levy	Artisans who rely on retail outlets in Lismore are affected by increased retailer costs & disruptions to store fronts.
Collaboration with business	We need to work together as a local retail community to attract more people to our centre. We are one but seem to have many factions within our area. I.e. Lismore town v's Lismore square etc. lets work together.
Communication	I was not provided with an opportunity to participate at events / happenings in terms of promotion etc.
Communication, City Centre Manager, Lismore Visual Image	Compared to places like Tamworth and Port Macquarie Lismore is downtrodden, dirty, dangerous and there is no city pride apparent. The outskirts are visually unwelcoming to the visitor, and trying to visit after the main trading hours depressing especially on Sat and Sunday. Unless one has a computer that is regularly used there is no information on promotions, no banners or promotional material bought into shops and most of us would not know what the promotion centre manager looks like. Get them out of the office and onto the streets and into the shops more. Lismore is known as "another day in paradise"
Communications, City Attractions, Business coaching, Infrastructure	The Mayor and her use of social media is one of the most effective means of hearing of what's happening in there CBD, including new shops etc - plus there is that personal touch. This tends to break through the visual clutter of advertising conducted in various media. Would like to see the Regional Gallery become more of a destination and part of 'local activities' - daytime and night time, if possible. More promotion here would be good and improved opening hours. Art in the Heart has had varying success - mainly due to the quality of some of the work. This needs to be more scrutinised with a stronger curatorial influence. Guerrilla activities, like yarn bombing, need to be guerrilla and not organised and a promoted event. The value of things like this is their spontaneity and some sort of social/philosophical underpinning - not just copying other places for the sake of appearing to do something different. Pedestrian amenity is very important - shade, seating (not in the sun), drinking fountains and access to public toilets. Way finding is also important and maps +/- directories may assist in seeking out local destinations on foot - particularly for visitors. Illumination at night also important for these elements. A mentoring or training programme for visual marketing, shopfronts and window displays might be appropriate to elevate the quality of CBD and street appeal of businesses (add LED lighting, reduce clutter, add a little more sophistication etc). Similar endeavours in customer service and presentation might be an idea too. This not so much about business promotion, but enabling businesses

	more to contribute to an improved whole.
Council – planning, Economic development	Lismore is not growing. The population is declining. Primary school enrolments are dropping and some teachers fear job losses in local schools. New development and major attractions are going to Ballina. I would rather shop in Ballina than Lismore. Ballina is growing and even Xavier Catholic College has over 1000 kids!! There are many empty shops around the Lismore CBD. Lismore needs a large homemakers centre like that at Tweed Heads with warehouse shopping and easy all-day parking. There is a general feeling when walking around Lismore that it is a lower socio-economic area based on the presentation of people, businesses and poor choice of retail outlets. Even shops like KMart and Target carry the cheaper lines that cannot sell well in more upmarket areas because Lismore has been identified by these large retailers as "lower socio-economic". Harvey Norman removed its entire kitchen display because of poor sales. Mills transport has moved its brick display to Ballina. I go shopping at Target at Queen Street Mall in Brisbane because it has more upmarket clothing lines which are never available to people in Lismore. Lismore City Council needs to stop trying to turn Lismore into the next Byron Bay with all their "greenie" agendas and start approving development, fast-tracking business applications and get Lismore buzzing with vibrancy again.
Infrastructure	Finish off the bare and unattractive roundabouts. car parks and toilets are matters of constant complaint. People will not shop if they cannot park their cars.
Infrastructure	Stop fining everyone in the parking spaces. No wonder they all go to the square. There they can park all day undercover and have public toilets to go to, plus they do not cop a fine when they get back to their car.
Infrastructure	First, fix the roads!!!!!!!!!!!! that is all people want, roads and parking!
LBPP	Needs transparency and input from business.
LBPP	Until I joined the Chamber of Commerce, I did not know what the LBPP was and what it did.
LBPP	Who are they and what do they actually do..... Why are they not accountable for the money they spend and where it is spent?
Lismore Square	The Lismore Shopping Square should be renamed
Lismore Visual Image	Perhaps businesses should be encouraged to renew signage regularly, by a fee/ rate reduction
Opening hours	That businesses in Lismore should be open longer hours on the weekends, as most people that work Monday to Friday this is the only time they get to go and do their shopping and the current hours don't suit. It would be more beneficial for businesses to be open over the weekend more than being open every day of the Mon-Friday week. Other people come to the area over the weekend also and currently there isn't much to offer to make it worthwhile for people to come here the same could be said about Ballina. If you looked at any other tourist based towns most are open on the weekend as they know that's how you draw other people out of town to the area. Byron Bay is an example of being open on the weekend and that's part of the attraction to that area.

Other Business, Opportunities	Activities and events to include suggestions for shop fronts to link in with themes similar to the lantern parade. Suggestions sent out 3 weeks prior and possible quarterly.
Security, Parking, City Attractions	The daytime security patrols are a waste of time and money. There should be unrestricted FREE parking. The Lantern Parade is a waste of time.
Supportive, Communication	I believe there has been a very significant improvement in the CBD over the last 4 years. Particularly the appointment of a manager, the markets in Magellan St, Art in the Heart, the Back Alley Gallery and The CON events -Well done!! I don't however appreciate the lack of co-ordination over the 'truck pull' events. We have NEVER been approached by the organisers for our comments. It happens in the same part of Keen St every time (outside our business, twice this year) and we lose hundreds of dollars, not just in sales.
Supportive, LBPP	To be honest I am not 100% clear on what they do but I am supportive of their efforts and more than happy to contribute funding
Supportive	keep it going
Transport	I believe that suitable low cost (say \$1.00 or \$2.00 per trip) regular shuttle type transport services between Lismore city centre, Lismore square, local parking areas (suitable for travellers in motor homes as well as local shoppers to get to and from shops easier and to overcome the major parking problems in Lismore city centre area that make people go to shop at Lismore square and have no parking problems both with availability and time zones. Etc. Staff parking in the parking bays in Lismore city centre take up customer parking that is so valuable for customers.

Note: Comments by respondents which could be considered defamatory or of a personal kind have not been included in this Appendix.