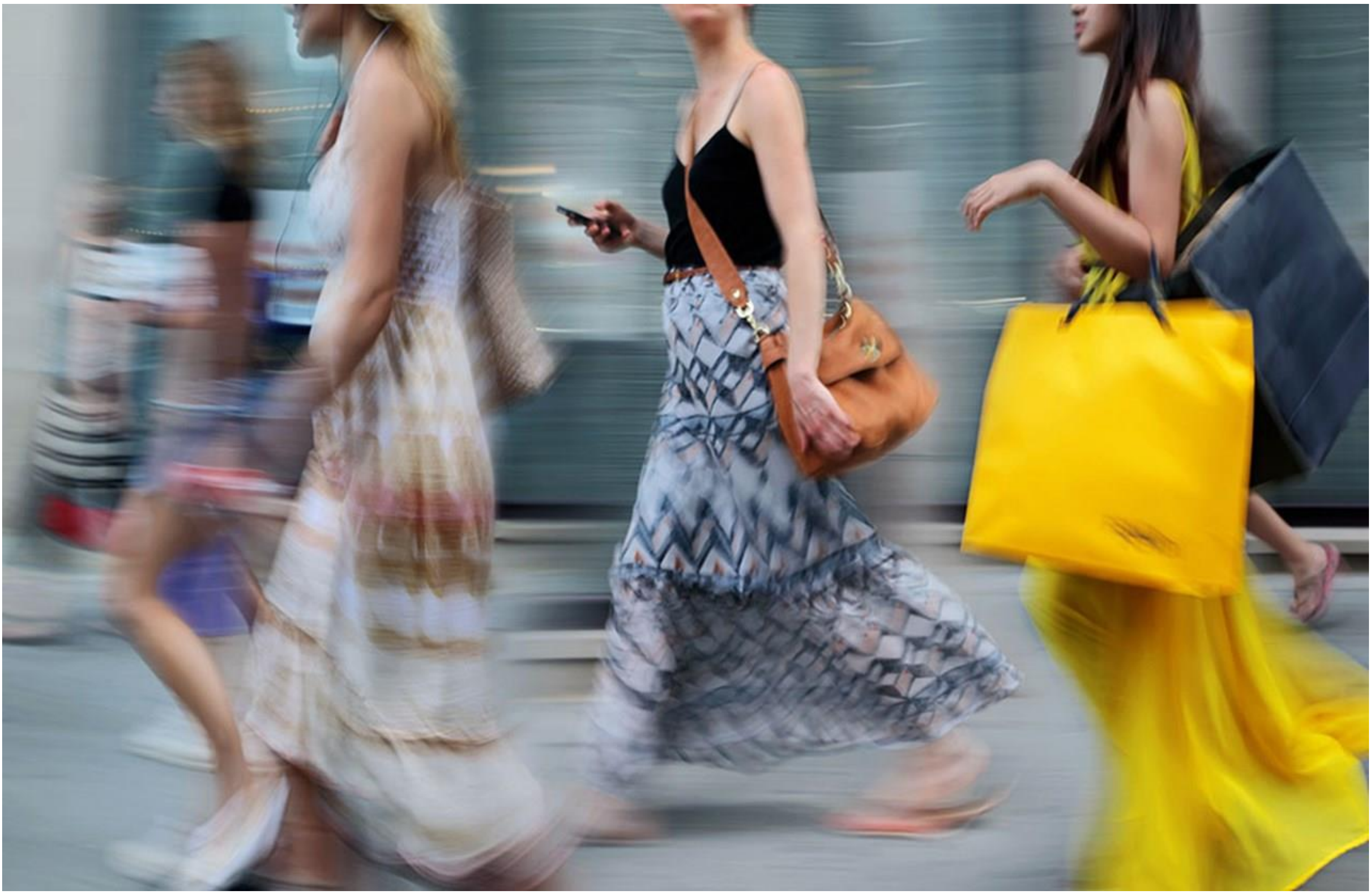
Shopping in the City

Understanding Drivers and Barriers to City Shopping in Launceston, Tasmania



Dr Louise Grimmer

Tasmanian School of Business and Economics

UNIVERSITY of TASMANIA

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About the Author

Dr Louise Grimmer is a Retail Marketing Researcher in the Tasmanian School of Business and Economics at the University of Tasmania. Louise has a PhD in retailing and her research focuses on factors affecting small and independent retailers, the role of marketing communications in improving retail performance, improving retail precincts, communications and sustainability management in the grocery sector, and how the digital economy is transforming traditional modes of shopping. Louise also has research interests in the impact of the visitor economy on local retailers and local shopping precincts, and the future of department stores.

Louise is a Member and Certified Practising Marketer (CPM) of the Australian Marketing Institute, a Member of the American Marketing Institute and a Fellow of the Institute of Place Management. Louise has managed retail outlets in Australia and overseas and has been an invited Judge for the National Retail Association's Annual Retail Awards. Louise is regularly sought out by local, national and international media for her retail and marketing expertise.

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Executive Summary

The Shopping in the City project was commissioned by the City of Launceston in early 2019 in response to perceptions amongst some city traders that retailing in the city centre is suffering with a consequent need to examine ways in which city centre shopping could revitalised.

The aim of the Shopping in the City project is to provide empirical evidence of the drivers and barriers considered to be important for shopping in the city centre of Launceston, Tasmania. Retail and service business owners/managers operating in the Launceston CBD (within the Cityprom boundary); key stakeholders, and shoppers were surveyed in April 2019. Responses were received from 99 traders, 268 shoppers, 9 key stakeholders from the Launceston business community, and 24 employee stakeholders from the City of Launceston. Data were mainly analysed using Leximancer, a computer-generated software program used for qualitative research.

Key Findings

Trading conditions are challenging for the retail sector in Launceston, as in other areas around Australia and internationally; however, data actually shows retail vacancies in Launceston are now at lower levels than previously, new businesses continue to open and there are many retailers trading strongly. There are factors identified in this study that require attention from various stakeholder groups including the City of Launceston, Cityprom, the Launceston Chamber of Commerce and from individual retailers. In particular, it is imperative that retailers seek to address current changes in consumer shopping behaviour and the continued transition to a digital economy. Physical retailing will always be important for shoppers, but consumers are increasingly demanding a choice of shopping channels through which to engage with retailers. Some stores in Launceston are making, or have made, the transition to offering an online service, but there are many that have not yet done so.

The data indicate a number of factors requiring attention from the City of Launceston, most notably issues around parking, further improving the Brisbane Street Mall, improving facilities and amenities, increasing greenery, addressing anti-social behaviour and increasing food options, particularly in Brisbane Street Mall. Many of the identified issues are already being comprehensively addressed by City of Launceston and there are clearly some misconceptions about the role and responsibility of the local authority, particularly in terms of solving the issue of empty shops and their appearance, and addressing anti-social behaviour.

The data also indicated factors requiring attention from Cityprom and the Chamber of Commerce, notably the implementation of a calendar of regular events (Cityprom are already active in this space); using destination marketing to attract visitation; encouraging pop-up stores, and increasing opportunities for advocacy. There were also comments about assisting retail businesses in terms of store presentation, keeping up to date with consumer shopping trends, improving the customer experience, marketing and general business skills.

Overall Recommendation

Key stakeholder organisations to develop an integrated city marketing campaign to position the city as a speciality shopping destination as well as offering a range of experiences for visitors. The campaign should strongly promote the unique nature of the city, its stores, arcades, eateries and services and bring city businesses together in a collaborative and positive manner.

Recommendations for Retail and Service Businesses

- City traders to develop an understanding of the role of retailing in the city and the positioning of the CBD in offering a specialty shopping experience not to be found in other locations outside the city centre.
- In recognising how consumer shopping behaviour is changing, city traders without an online and/or e-commerce presence should work towards gaining these capabilities.
- City traders to develop their own individual 'differentiation' strategy to ensure that their product/services offerings are unique and/or not available from other stores, particularly those outside the city.
- City traders to ensure high quality customer service is a priority for their business, recognising the importance of customer loyalty for encouraging repeat business and positive word of mouth.
- City traders to recognise the power of positive word of mouth and to leverage the power of electronic word of mouth via their own social media accounts.
- City traders to work collaboratively with other complementary businesses in the city to leverage the power of collaborative marketing and draw visitation to an entire precinct rather than just individual stores.

Recommendations for Key Stakeholders from the Launceston Business Community

- Cityprom and the Launceston Chamber to formally discuss the findings of this report with the retail and service sector in the CBD.
- Launceston Chamber and Cityprom to host skills development workshops for retailers highlighting the changes in the retail sector and changes in consumer shopping behaviour, retail trends and opportunities presented by multi-channel retailing (in-store, online, mobile, app), collaborative marketing and contemporary retail strategy.
- Cityprom to reconsider a re-brand – a refreshed website and social media presence – and the development of a shopping/city information app and paper guide (e.g., for local accommodation providers).
- Launceston Chamber and Cityprom to work cooperatively by identifying their common goals for the city and their members. A joint approach to city marketing and business issues from both organisations will strengthen any efforts made to improve the business environment for city traders.

Recommendations for the City of Launceston

These recommendations include only suggestions which the City of Launceston has the ability to actually affect. There are clearly a number of misconceptions amongst city traders and the broader community (as evidenced through the feedback elicited from this study) about the role and responsibility of Council.

- Consider a city-wide strategic approach to dealing with the visual aspect of empty shops which could include a public register of landlords who own empty shops and putting the onus on building owners to improve the appearance of empty stores.
- Consider working with real estate agents and landlords to encourage short-term retail leases for empty stores to encourage pop-up stores, the trial of new retail offerings or for short-term non-retail use.
- Consider developing a policy that sets out specific types of businesses that can lease premises in specific areas in the city (e.g., Quadrant Mall) to ensure that the retail mix in particular areas within the CBD encourages footfall and vibrancy.
- Consider developing a policy that allows for multi-use of some retail tenancies (e.g., a shop during the day, café/bar at night) and allows for complementary businesses to rent a single premise.
- Consider making specific improvements to the Brisbane Street Mall including increasing food options (e.g., food vans), increasing existing seating options (including tables with chairs and single seating options), moving the information booth to the Mall, and in the longer-term installing an all-weather canopy.
- Consider providing a permanent council-run pop-up space (this could be a booth-type structure in the Mall, perhaps as part of the Information Booth) for short-term lease by new or existing businesses to showcase new retail product or brand offerings and drive footfall to city centre and the Mall specifically.

Introduction

The purpose of this report is to present the results of the 'Shopping in the City' project. The project was commissioned by the City of Launceston in early 2019, and surveys were administered in April 2019. Retail and service business owners/managers operating in the Launceston CBD (within the Cityprom boundary); key stakeholders, and shoppers were surveyed as part of this research project. This report outlines the background to the project, the methodology employed, the results, and discussion of the findings. The report concludes with key recommendations for consideration by the City of Launceston.

Background

Retailing is an essential social, economic and cultural activity, and a strong retail sector makes a significant contribution to local communities and to local, state and national economies. Whilst acknowledging the role of national chain stores, it is most often smaller, independent retail businesses which contribute to local communities by providing a variety of goods and services, employment opportunities, and an alternative to the offering from multinational corporations. It is the independent retail sector which adds interest and 'flavour' to local shopping areas. However, increases in the array and availability of products with accompanying price transparency, the globalisation and expanding dominance of large retail chains, tremendous growth in online sales, rapid advances in communication and distribution technologies, and turbulent economies, all contribute to a volatile and competitive environment for traditional bricks and mortar retailers, particularly small firms.

The Australian retail sector, like many other international retail sectors, is facing significant challenges at present and there have been a number of high-profile retail closures over the past 18 months (discussed later in this report). Several factors have contributed to the challenging trading landscape, including a flat economy, low wage growth and resulting low levels of discretionary spending. In addition, consumers are changing the way they shop (i.e. the number of people shopping online is steadily increasing) and many SME retailers are yet to respond effectively to this change. Small and micro retailers, in particular, are struggling to adapt to the new digital trading landscape and many have not developed an ecommerce offering. The challenges facing the Australian industry as a whole are also being experienced by retailers and retail precincts across Tasmania.

Project Aim

The aim of the Shopping in the City project has been to provide empirical evidence of the drivers and barriers considered to be important in for shopping the city centre of Launceston, Tasmania. The project has been informed by work being undertaken in the UK by retail and place management academics from Manchester Metropolitan University and the Institute of Place Management [1 2] The project aims to channel existing knowledge of retailing (and of the changes in the retail landscape and consumer behaviour), and apply this knowledge to individual locations (in this instance the city centre of Launceston, Tasmania), so that the City of Launceston, key stakeholder groups, and individual retailers can work towards a sustainable future for the city centre. [1 3]

Retail Disruption and Changing Consumer Shopping Trends

Retailers around the world are responding and adapting to the disruption presented by online and international retailers. The retail sector is facing unprecedented technological change, and the digital economy is rapidly transforming traditional modes of shopping. Consumers are busier than ever, they are much more tech savvy, and they want to be able to connect with retailers via multiple channels (i.e. in-store, on smartphones, apps and online). Consumer expectations of retailers are significantly changing and retail firms must be agile in responding to an ever-evolving industry and consumer landscape. To put it bluntly, retailers who are non-responsive will simply be left behind.

Online Shopping in Australia

Research conducted by Australia Post[4] shows more than 73% of Australian households shopped online in 2018. Out of a total $275.3 billion spend on retail, 10% or $27.5 billion was spent online and this figure is predicted to reach 12% of total retail spend within the next three years. Other key trends include:

- Demand for faster shipping times, particularly next-day delivery;
- Connecting the physical and online shopping experience to create a seamless customer experience
- Adoption of ‘Buy now pay later’ (BNPL) is accelerating particularly amongst female Millennial online shoppers (Millennials are those born between 1981 – 1996);
- Online marketplaces such as Amazon, Catch Group, and Myer Marketplace are growing in dominance and smaller independent retailers could take advantage of marketplace platforms to build brand awareness and increase online and instore sales;
- Online shopping is increasingly being conducted on smartphones (more so than laptops, tablets and desktop computers) and customers are completing online shopping transactions later in the day with 32% of purchases made between 7.00pm and 10.00pm.

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[1] Parker, C., Ntounis, N. and Millington, S. 2016. High Street UK 2020 Project Report: Identifying factors that influence vitality and viability. Institute of Place Management, Manchester Metropolitan University.
[2] Millington, S., Ntounis, N., Parker, C., Quin, S., Roberts, G. and Steadman, C. 2018. High Street 2030: Achieving change. Institute of Place Management, Manchester Metropolitan University.
[3] Grimmer, L. 2018. Marketing the city: An examination of precinct marketing programs and retail resilience. *International Place Branding Association Conference*, 5-7 December, Macao.
[4] Australia Post, 2019. *Inside Australian Online Shopping: 2019 eCommerce Industry Report.*

Australians are predominantly purchasing fashion, health and beauty, homewares and appliances, hobbies and recreational goods, media (books, stationery and prints) and speciality food and liquor online. In addition, online marketplaces and discount stores accounted for around one third of online spend.

Online purchases grew in every State and Territory, particularly in Victoria, Queensland and Tasmania. Online sales in Tasmania account for just 2.5% of total online sales but the state recorded growth of around four percentage points above the national average. Tasmanian recorded the highest increase in online shopping growth in 2018.

In terms of consumers purchasing from international online retailers, the number one overseas market is China, followed by the United States, United Kingdom, Hong Kong and New Zealand. Consumers are purchasing fashion, consumer electronics and health and beauty products from international sellers. The most popular international purchasing sites are eBay, amazon and wish.

It should be noted that this research was prepared using deliveries data recorded by Australia Post in 2017 and 2018 and the figures are generally based on an extrapolation of the data, nevertheless the findings clearly indicate key online shopping trends in Australia.

Key Online Retail Technology Trends

Advances in technology are being embraced by the retail sector globally, with many large global and national firms investing in online technology to assist them in maintaining a sustainable competitive advantage. Australian retailers have been slower to respond to changes in the digital landscape and the adoption of new technology but it will be increasingly important that the Australian retail industry seeks to invest in the following types of technologies:

- Virtual assistants
- Visual search
- Beacon technology
- Augmented reality
- Personalisation using algorithms
- Chatbots for 24/7 customer queries
- Biometric payments

It has been well documented that Australian department stores were slow to respond to the introduction of online shopping, many not developing an effective online shopping platform until well after other smaller and more nimble retailers had moved into the online space. The problem for the late adopting firms was that many of their traditional customers, disappointed with their online shopping offering, started shopping elsewhere and many never returned.

The playing field in terms of online shopping has levelled somewhat in Australia, but there are numerous SME retail firms, particularly small and micro retailers, that have not invested in ecommerce. Given the changing shopping habits of Australian consumers, this is of concern, and it is vitally important that retailers, large and small, recognise the imperative to develop and online offering if they are to remain competitive in the future.

Investing in Customer Service

Recent research conducted by Swinburne University[5] concluded that in order to effectively respond to changing consumer demands retailers must understand exactly what their customers require and offer the appropriate digital or human customer service to meet consumer needs. Retailers must also offer a variety of sales channels so that their customers can choose which channels (e.g. physical, online, mobile, app) they prefer to use, and at which point of the shopping journey they wish to use them. Importantly the standard of service and the shopping experience should be standardised across channels.

> *Ultimately, the future belongs to those organisations who understand and leverage what is possible and employ a combination of both digital and traditional channels to build trusted customer relationships and valued experiences*.[4]

Key findings from the Swinburne University research project found:

- Customer service is a key differentiator – retailers need to invest in a high-quality and differentiated customer service experience;
- Multichannel is the new normal – retailers should work towards offering multi-channel customer service and ensuring that in-store and digital channels complement rather than compete with each other;
- The human element remains crucial to effective customer service delivery – whilst consumers are increasingly embracing digital channels, they still seek human engagement and want the option to interact with a 'real' person;
- Consistent delivery of a positive customer service experience is paramount – the customer service experience (positive or negative) has a profound effect on purchase intention and behaviour, and
- It's time to 'wow' customers with service – moving on from a transactional activity, retailing is about deepening connections and adding value to the shopping experience. [4]

The Next Generation of Shoppers

Young consumers are demanding a different shopping experience from older generations. They are much more tech savvy and expect to be able to connect with retail brands on multiple channels and at any time of the day or night. The expect convenience and speed of service and delivery. Global retail consultancy Kantar Retail's latest 'Global Retail Opportunity Index Ranking' for the period 2010-2015 highlights two key trends emerging from the Kantar BrandZ Global Top 100 study. These include the shifting preference to digital channels particularly from GenY to GenZ consumers, and the efforts made by retailers and brands to demonstrate the importance of improving and reinforcing consumer

[5] Ferraro, C. and Restrepo, M. 2019. The Customer Service Experience: Aligning Channels with Evolving Consumer Expectations, Experiences & Behaviour, CXI Research Group: Swinburne University and CPM Australia.

perceptions that they are 'responsible' through social, environmental and corporate initiatives.[6] These trends will impact on Australian retailers, particularly the preference for online and app-based retailing. In this area, SME retailers need to do more to improve their online offering in order to meet the changing needs of Australian consumers.

The Function of Physical Retailing in Cities

In evaluating the changes that have taken place in the retail landscape in recent years, it is necessary to understand the *function* of retail within a city. Retail areas must not only 'respond sustainably to the needs, wants and desires of different users, consumers and investors' but also 'be part of a structure enabling resilient everyday life.[7] The full spectrum of retail functions should result in a well-functioning retail system, and this includes both private and public factors – a *private* exchange function which facilitates the efficient economic exchange of goods and services and a *public* good function which contributes to a number of different priorities.[8] Those priorities include contributing to the sustainability of a neighbourhood, creating a unique sense of place, ensuring equity in accessibility to goods and services and supporting environmentally sustainable and healthy lifestyles.[9] Of course this does not suggest that every retail business must incorporate and support all these functions, rather a retail 'system' within a region or specific location should attempt to address these factors consistent with societal and cultural norms.[5]

How Town and City Centres are Changing

Much of the research into the changing retail landscape comes out of the United Kingdom, Western Europe and the United States. Town centres certainly offer more than just shopping, culture, entertainment and public services are also important,[10] but it is through retailing that the changes happening in town centres are most visible: as shops close and leave vacant retail units behind.[11] Town centre revitalisation is highly ranked on the agenda of local governments, retail marketing and membership associations and broader community organisations. Town centres are regarded as vitally important in boosting local economies and activating communities[12]

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[6] http://www.millwardbrown.com/brandz

[7] Karrholm. M., Nylund, K. and Prieto de la Fuente, P. 2014. Spatial resilience and urban planning: Addressing the interdependence of urban retail areas. *Cities,* 36, 121-130.

[8] Dobson, J. 2015. Britain's town centres: From resilience to transition. *Journal of Urban Regeneration and Renewal*, 8(4), 347-355.

[9] Rao, F. and Summers, R.J. 2016. Planning for retail resilience. *Cities*, 58, 97-106.

[10] Millington, S., Ntounis, N., Parker, C. and Quin, S. 2015. *Multifunctional Centres: A Sustainable Role for Town and City Centres*, Manchester: Institute of Place Management.

[11] Hospers, G-J. 2017. People, Place and Partnership: Exploring Strategies to Revitalise Town Centres, *European Spatial Research and Policy*, 24(1): 65-79.

[12] Portas, M. 2011. *The Portas Review: An Independent Review into the Future of Our High Streets*, London: Department for Business, Innovation and Skills.

The retail sector in the UK has long been characterised by sequential periods of change[13] but in the past five years much attention has been paid to the declining 'high street' and the work of academics has been incorporated into recent government responses including the creation of the High Streets Task Force.

From the Institute of Place Management (IPM) at Manchester Metropolitan University[14]:

> *Across Europe, town and city centres have seen an erosion of their share of retail expenditure as first out of town retailing and now online retailing gave options to shoppers. In the UK, town and city centres attracted around 50% of retail expenditure in 2000 but according to the Centre for Retail Research, it is today less than 37%. Online retailing in the UK now accounts for about 18% of all retail expenditure and on some forecasts will reach 30% in ten years-time. This changing structure of retail is one of the reasons behind store rationalisation and closure that is seeing high streets lose many of their multiple retailers and store vacancies rise. All the data suggests these trends will continue.*
>
> *Structural change in other sectors is also impacting town and city centres. Whilst the number of pubs reduces, coffee bars still increase. New leisure and fitness activities are being located in town and city centres, alongside flexible working space. As the population grows, there is greater demand for homes and especially for smaller homes. Lifestyles are changing as well, and most town and city centres have moved on from just a 9-5 existence and over the next decade we will see a revolution in our usage of cars.*

Researchers from the IPM conducted research into how to advance local decision making to improve vitality and viability across high streets In the UK. The project, 'High Street UK2020'[15] identified 201 factors that influence the performance of the UK High Street and then further classified these into the top 25 priorities for action that partner towns in the project should focus on.

The research focussed on the collaborative activities of stakeholders on the 'High Street' and asked two research questions:

1. How much influence does each factor have over High Street performance?
2. How much influence could the High Street have over each factor?

The final 25 factors/priorities were therefore those that were considered to have a greater influence on vitality and viability as well as being factors that towns could actually have influence over. Those factors in order were:

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[13] Parker, C., Ntounis, N., Millington, S., Quin, S. and Castillo-Villar, F.R. 2017. Improving the vitality and viability of the UK high street by 2020: Identifying priorities and a framework for action. *Journal of Place Management and Development*, 10(4): 310-348.

[14] IPM, 2019. *Promoting town and city centre vitality and viability*. https://www.placemanagement.org/courses/vitality-and-viability-programme/

[15] Parker, C. Ntounis, N. Quin, S. and Millington, S. 2016. *Identifying factors that influence vitality and viability: High Street UK 2020 Project*. Institute of Place Management: Manchester Metropolitan University.

Priority	Factors
1. Activity Hours	Opening hours; shopping hours; evening economy
2. Appearance	Visual appearance; cleanliness
3. Retailers	Retailer offer; retailer representation
4. Vision and Strategy	Leadership; collaboration; area development strategies
5. Experience	Service quality; visitor satisfaction; centre image; familiarity
6. Management	Centre management; shopping centre management; town centre management; place management
7. Merchandise	Range/quality of goods; assortments
8. Necessities	Car parking; amenities; general facilities
9. Anchor Stores	Presence of anchor stores – which give locations their basic character and signify importance
10. Networks and Partnerships with Council	Networking; partnerships; community leadership
11. Diversity	Attractions; range/quality of shops; non-retail offer; tenant mix and variety; retail diversity; availability of alternative formats
12. Walking	Walkability; pedestrianisation/flow; cross-shopping; linked trips
13. Entertainment and Leisure	Entertainment; leisure offer
14. Attractiveness	Place attractiveness; attractiveness
15. Place Assurance	Atmosphere; BIDs (business improvement districts – UK); retail/tenant trust; store characteristics
16. Accessible	Convenience; accessibility; public transport
17. Place Marketing	Centre marketing; marketing; tenant/manager relations; orientation/flow; merchandising; special offers
18. Comparison/Convenience	The amount of comparison shopping opportunities compared to convenience (usually in percentage terms)
19. Recreational Space	Recreational areas; public space; open space
20. Barriers to Entry	Refers to obstacles that make it difficult for interested retailers to enter the centre's/High Street's market
21. Chain vs Independent	Number of multiple stores and independent stores in the retail mix of a centre/ High Street
22. Safety/Crime	A centre KPI measuring perceptions or actual crime including shoplifting
23. Liveable	Multi/mono-functional; connectivity; liveability
24. Adaptability	Retail flexibility; retail fragmentation; flexibility; mixed-use; engagement; functionality; store/centre design; retail unit size
25. Store Development	The process of building, upgrading, remodelling or renovating retail stores

According to the 'High Street Report'[16], also referred to as the 'Timpson Report' published in 2018, town centres should be developed as 'community hubs' which consist of leisure and social services sitting alongside retail and residential property. In 2018 the UK government created The Future High Streets Fund, a 675 million pound fund for an action plan for UK high streets and town centres to help areas adapt and transition in the future. There is increasing recognition, particularly in the United Kingdom, that in the future retailing may not be main drawcard for city visitation. Whilst still vitally important, retail will sit alongside services, attractions and opportunities for an 'experience' as factors in attracting visitation.

The Australian Retail Industry

In OECD countries the retail industry makes a significant contribution to employment, business activity and GDP and in the last three decades there has been significant growth in the number of large retail organisations (as well as the 'globalisation' of many retailers). However, it is small retail firms that dominate the retail industry in many countries, and this is particularly so in Australia.

From an industry perspective, retailing is Australia's second largest employer (the largest being the health care and social assistance industry), followed by construction and manufacturing. The Australian retail industry employs 1.9 million people, or 12 % of the working population. Reflecting this, the retail industry also makes a significant contribution to Australia's economic output, generating $571.7 billion in annual revenue. There are approximately 187,015 retail businesses in Australia,[17] around 95% of those are small businesses and almost half of those employ four or fewer workers making them 'micro' businesses. The retail industry is diverse in Australia, with considerable differences between retailers in terms of business size, format, and offerings; importantly these differences are further highlighted across different regions throughout the country.

Recently there has been considerable commentary concerning the competitive trading environment for retailers in Australia. The growth rate of retail sales has generally trended down over the past three decades, due to long-term structural changes in the economy and consumer behaviour, and retailers have also faced considerable and growing competition from online retailing and the entry of large international retailers.

Retailers in Australia must also deal with multiple regulations including planning and zoning, trading hours, importer compliance legislation, and workplace relations. There are however significant opportunities for retailers in Australia. The Kantar Global Retail Opportunity Index Ranking (mentioned earlier) ranked Australia number seven out of the top 34 countries for the 2010-2015 period. Of note, Australia's sustained growth resulted in a

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[16] Ministry of Housing, Communities & Local Government, 2018. The High Street Report: Findings and Recommendations of the High Streets Expert Panel
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/766844/The_High_Street_Report.pdf

[17] Grimmer, L. 2019. 'Disrupting the giants: how independent grocers respond to the supermarket duopoly in Tasmania, Australia' in Byrom, J. and Medway, D. (Eds.), *Case Studies in Food Retailing and Distribution*, Duxford: Elsevier.

higher ranking than the United Kingdom, France, Japan and Germany. The index is based on three factors: the size of the retail market, market risk and inflation-adjusted growth forecasts. Kantar have not released the index for the 2015-2020 period, however in 2018 Kantar reported retailing as the second top performing sector within Australia's economy at 19.6 billion. The report's authors note that retail brands should defend their markets and accelerate growth through new market penetration by focussing on improving capabilities across business areas from logistics and communication to customer care.[18] Australia's geographic isolation has traditionally prevented outside competition but this geographic isolation is now being flattened by technology and consumers are able to access global brands much more readily.[1] Australian retailers now face a growing threat from disruptive foreign players offering personalised shopping experiences. In addition, Australian consumers perceive there is an innovation gap across local retail brands; they expect more and will increasingly favour those brands that are tech savvy and able to offer greater convenience.

> *While retail platforms and technology make it easier for Aussie brands to expand, they also bring new players to our shores – and as such, the best defence is a strong brand. Applying innovation across your product, business and customer experience in an agile environment are essential to survival in this global market* (Jon Foged, CEO of Kantar Australia).

Small and micro retailers make a significant contribution to the Australian economy, but trading conditions have become increasingly difficult since choices of where and how to shop have changed. Small retailers compete against larger national and global organisations, as well as 'big box' developments and online retailers. Ongoing small retailer research[19] [20] [9] shows many small retailers are still yet to use e-commerce or to successfully leverage their online presence to gain sustainable competitive advantage.

In 2018 the Australian retail industry arguably suffered one of its worst years, particularly in terms of store closures. Retail closures in 2018 included well-known retailers including Roger David, Marcs, Pumpkin Patch, Metalicus, Laura Ashley, Ed Harry, Top Shop, Toys'R'Us, Blockbuster Video, David Lawrence, Herringbone, Rhodes & Beckett, Maggie T and Napoleon Perdis. Department stores are also struggling; just this month South African retailer Woolworths Holdings which owns department store David Jones announced a $437 million write down, following on from a $714 million write down the previous year. Woolworths Holdings declared the Australian retail sector to be in 'recession' and highlighted the tough trading conditions in Australia which has resulted in flat sales and decreasing profitability. David Jones was originally purchased by Woolworths Holdings for $2.1 billion in 2014, but the value of the department store has decreased markedly to just

[18] Abano, J. 2018. Retail named second top performing sector. *Inside Retail*. https://www.insideretail.com.au/news/retail-named-second-top-performing-sector-201806/

[19] Grimmer, L., Grimmer, M. and Mortimer, G. 2018. The more things change the more they stay the same: a replicated study of small retail firm resources, *Journal of Retailing and Consumer Services*, 44: 54-63.

[20] Grimmer, L., Miles, M.P., Byrom, J. and Grimmer, M. 2017. The impact of resources and strategic orientation on small retail firm performance, *Journal of Small Business Management*, 55(S1): 7-26.

$965 million. In a statement Woolworths said the write down was a result of "economic headwinds" and the "accelerated structural changes affecting the Australian retail sector."[21]

A significant factor contributing to the challenging retail landscape are low levels of discretionary household spend in Australia. The Household, Income and Labour Dynamics in Australia (HILDA) Survey[22] results were released at the end of July 2019. This longitudinal survey collects information about household and family relationships, health and education, and income and employment. The latest results show the typical Australian household is worse off now than during the global financial crisis, with disposable incomes falling between 2009 and 2017. During this period the average Australian household income grew by only 3.5% ($3,156). Median household equivalised income (a measure of material living standards obtained by adjusting household disposable income for the household's 'needs') in Tasmania increased by just 0.4% to $41,172.

A flat economy, low levels of discretionary spending, changing consumer shopping habits, and unresponsive retail formats have coalesced into a perfect storm of dire trading conditions for some sectors in the Australian retail industry. In terms of current growth, the retail industry has grown by only 1.1% between 2012 and 2017, the number of retail businesses has decreased by 2.1% over the same period, and the number of people employed in the industry has also decreased by -0.4%. Forecasted growth (2017 to 2022) in terms of revenue is predicted at just 1.1% , -1.0% for the number of businesses and -0.1% for the number of retail employees.[23]

Retailing in Tasmania

Tasmania's population of 520,830 million is concentrated in three main regions: Launceston in the North, Hobart in the South and Burnie and Devonport in the North West. Compared with the majority of mainland states, Tasmania has a relatively small (and aging) population with low population growth, high rates of unemployment and underemployment, low socioeconomic status indicators, and low rates of private and government investment. The environment for small retailers is therefore challenging: there is a shortage of suitable retail property available for rent/purchase, and retail rents are relatively high, particularly in shopping centres.[24] There is a distinct lack of shopping clusters in local neighbourhoods throughout the state, and a trend towards 'big box' or anchored shopping centres (with associated high rents and competition from national retailers).[25] Despite this, barriers to entry in the industry are relatively low, and many new small retail businesses continue to

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[21] https://www.theaustralian.com.au/business/companies/david-jones-writes-down-437m-says-local-retail-in-recession/news-story/a5f47f92089035fb75e383d88b366dea

[22] https://melbourneinstitute.unimelb.edu.au/hilda

[23] https://www.ibisworld.com.au/industry-trends/market-research-reports/retail-trade

[24] Productivity Commission. 2014. *Relative Costs of Doing Business in Australia: Retail trade, Research Report*. Canberra, ACT: Australian Government Productivity Commission.

[25] Grimmer, L. 2015. *Retail matters: Examining the relationship between resources and performance in small retail firms*. Doctoral Thesis, University of Tasmania.

open bricks and mortar stores, often on the fringes of the CBD or in suburban areas. Rents in these areas are often lower than those in shopping centres, arcades, malls and city areas.

The retail industry is the second largest employer in Tasmania. In the period 2006 to 2016 the sector experienced a decline of 840 workers and now employs 11.3% of the total Tasmanian workforce (a 1.0 percentage point decline).[26]

By 2016 more workers in Tasmania were employed part-time rather than full-time, particularly in service-based sectors including retail trade, accommodation and food services. From 2006 to 2016 the occupation of retail manager declined by -686 workers in Tasmania.[27]

Retail Trade Figures

The latest retail trade figures from the ABS show the nominal value of retail trade in Tasmania was estimated to be $543.6 million in trend terms in May 2019.

In trend terms this is unchanged compared with the previous month (0.0%) but up 1.3% from the level recorded one year earlier. From February 2018 to August 2018 retail turnover in Tasmania grew on average at a faster rate than the rest of Australia but since then Tasmanian retail growth has been relatively flat.[28]

This reflects the just-released Australian retail figures for June which show the retail sales count was up by just 0.4 per cent on May. Retail sales have been flat on 0.2 per cent for 11 months in a row. The trend shows growth over the year of 2.7 per cent but actual dollars are up only 1.9 per cent, from $25, 827.2 million in June 2018 to $26, 311.9 million. Analysts predict when GDP growth figures for the 2018-19 financial year are published in September, they are likely to be the lowest since 1992. Household consumption accounts for more than half the economy and whilst retail sales are not the only component of consumption, they are an important factor.

Retailing in Launceston

The city of Launceston has a population of 66,802. The city population is predicted to grow by just 4.9% by 2042 to 70,084.[29] Research conducted by the University of Tasmania's Institute for the Study of Social Change (ISC) identified the type of population change for each of Tasmania's 29 Local Government Area (LGAs) from 2016 to 2018, and concluded that Launceston has a 'recovery' population type. A 'recovery' type is one which has experienced low, no or negative growth, but the ISC report notes Launceston has had a

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[26] Institute for the Study of Social Change. 2017. *Insight Two: Tasmania's Workforce by Industry Sector*. University of Tasmania.

[27] Denny, L. Insight Seven: *Workforce polarisation in Tasmania: Implications for the Future of Work and Training.* Institute for the Study of Social Change: University of Tasmania.

[28] ABS, 2019. *Retail Trade, Australia*, ABS CAT NO 8501.0; Tables 3, 13.

[29] Denny, L. and Pisanu, N. 2019. *Insight Nine: Regional Population Trends in Tasmania: Issues and Option*. Institute for the Study of Social Change: University of Tasmania.

minor turnaround in the last two years, with population growth driven primarily by overseas migration.[29]

Broader economic factors that are impacting on retailing in Launceston[30] include:

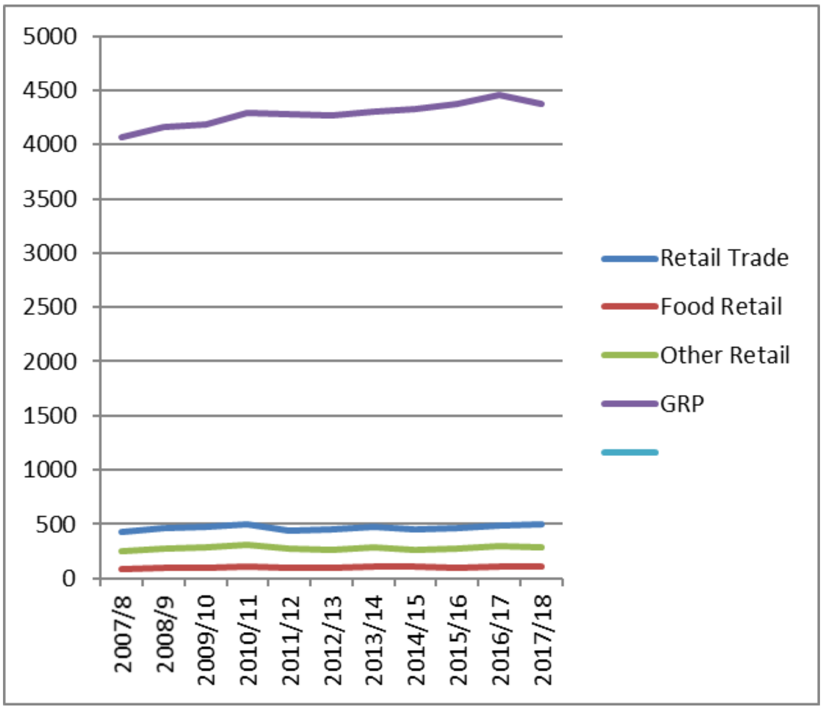
- Low population growth;
- Economic growth (GRP) of the city of Launceston has also been quite low over the past decade (refer to Table 1 and Figure 1 below);
- Low levels of discretionary household income (i.e. that available for retail spend) as shown in the results from the HILDA survey;
- Inflation and increasing costs of living are eating into disposable income
- Dramatic shifts in population demographics namely,
    - The impact of aging (1, 976 people have moved into the 50 plus category in the past five years to 2016 and approximately 1, 000 people have moved into the high personal care category in the past decade);
    - A significant net loss (1, 063 people) of working age/young families from the City in the five years to 2016;
    - The changing cultural demographic with an increase of 1, 429 humanitarian migrants living in Launceston in 2016 (typically lower and different conventional retail spend).
- Online spending sits at 8% and predicted to grow to 12% by 2025 in a local retail environment with a low adoption rate of online selling or web presence by retailers encouraging local shoppers to shop online with national/international retail brands;
- Rapidly changing traditional retail model now featuring online sales, new payment systems (e.g. Afterpay) and an environment of perpetual discounting.

Table 1 | Retail Trade Figures – City of Launceston Retail and Gross Regional Product Over Time

	2007/8	2008/9	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Retail Trade $	431	458	472	505	445	449	470	451	460	492	496
Food Retail $	90	95	103	110	94	96	104	104	101	109	114
Other Retail $	250	269	283	307	276	266	284	268	279	295	292
GRP $	4064	4159	4191	4291	4277	4271	4307	4326	4371	4453	4369

[30] Data and research provided by Dr Bruce Williams, Senior Economic Advisor, City of Launceston, 2019

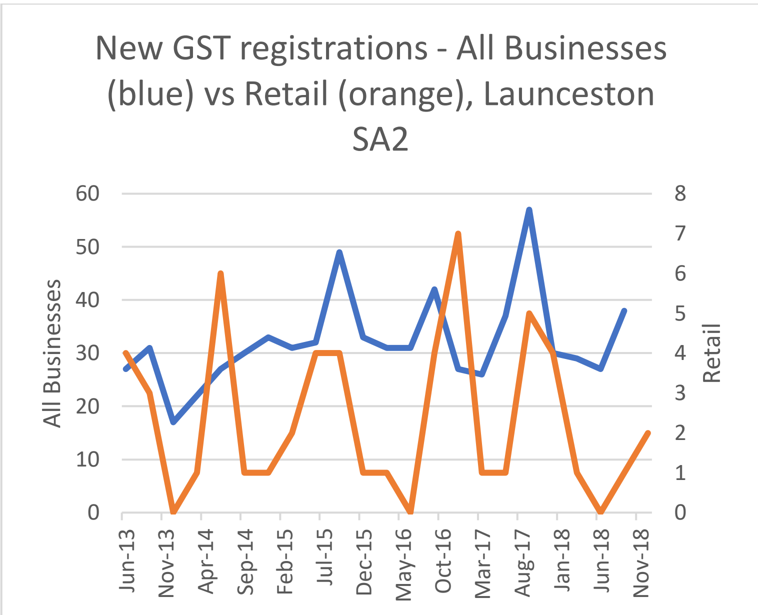
Figure 1 | Retail Trade Figures – City of Launceston Retail and Gross Regional Product Over Time



New GST Registrations in Launceston

Data provided by id. The Population Experts shows the number of new GST registrations for all businesses (in blue) and for retail (in orange) in Launceston (not narrowed to the CBD or Cityprom boundary) for the period June 2013 to December 2018. This data is shown in Figure 2 (below). The data shows that across Launceston retail businesses continue to open.

Figure 2 | New GST Registrations June 2013 to December 2018



Retail Vacancies

The City of Launceston has collected data[31] on retail vacancies within the Cityprom boundary over the past five years. Data has been collected via physical street visitation and personal communications, and the findings are detailed below. The data is collected on the basis of what can been seen at *ground* level in the city, the analyses does not include vacancies above ground level or the situation of vacancies within multi-office buildings at ground level.

July 2014
75 vacancies at ground level.

December 2014
76 vacancies at ground level.

August 2015
70 vacancies at ground level. One of the vacancies is a supermarket development which will open in the future.

August 2016
58 vacancies at ground level. Vacant shops in this assessment were less evenly distributed throughout the city than in previous assessment. Almost half of the vacancies (26 out of 58) were clustered around Elizabeth Street, Centre Way Arcade, York Town Square and Tattlers Arcade.

August 2017
65 vacancies at ground level. There are a number of relatively large vacancies (approximately 10 including *The Mercury* newspaper, *The Examiner* newspaper, Birchalls, etc). From observations there has been an increase in professional services opening (technical, financial and legal) as well as a number of small, boutique food/beverage/cafes and nail bars and Chinese massage businesses.

August 2018
59 vacancies at ground level. A number of relatively large vacancies which were observed in 2018 have been filled such as *The Examiner* newspaper.

January 2019
53 vacancies at ground level. The total vacancy number has declined since the previous survey in August 2018. Continuing the trend in observed in declining vacancies and the trend to refurbishment, 6 of the vacancies are in the process of major refurbishment pending re-opening as a new business. Therefore, the vacant rate could be considered as 47 premises.

The data collected in January 2019 shows *the lowest vacancy level recorded since 2014* and supports the trend from 2018 by providing evidence that from street level, shop vacancies declined.

[31] Data and personal communication, Dr Bruce Williams, Senior Economic Advisor, City of Launceston, 2019

August 2019
67 vacancies at ground level. Although this rate is higher than the vacancies reported in January 2019, the 'like for like' comparison with the previous August surveys shows an almost identical level of vacancy since 2016. This supports the trend from 2018 and provides evidence and confidence that as viewed from the street level, the rate of shop vacancies is relatively static.

Additional observations include that many of the vacant shops are small retail outlets; of the larger retail stores that are empty, most of these are under a major refurbishment process which reflects a renewal process rather than a decline; Quadrant Mall continues to be challenging with approximately 20% of shops vacant and this has been the trend for some time now; there are groups of vacant shops in Tattlers Arcade and along Elizabeth Street; these are areas of the city that have had high vacancies for years. There seems to be an observable trend and an increase in the number of renewal projects that are associated with inner city living above shops.

In addition to the data collected on vacant ground level shops in the Cityprom boundary, the City of Launceston[32] has heat mapped commercial vacancies across the CBD from 2014-2018. This map is available in Appendix 1 and it clearly identifies 'hot spots' in the city, that over an extended time-frame show higher levels of vacancies – these areas are in Tattlers Arcade, Elizabeth Street, Quadrant Mall, Centerway Arcade and part of George Street.

The High Street Report (referred to earlier) made the following observations and recommendations:

> *Empty shops can be depressing eyesores that drag down shopping areas. It can be hard for local stakeholders to know who owns these properties, and we would like to see further detail on the announcement at Budget 2018 to pilot a register of empty properties in selected local authorities. Local authorities should use their initiative to encourage landlords and tenants to think innovatively about how to use empty properties. If a deal can't be struck at the market rent, special terms should be offered to community businesses or other traders with social purpose. The announcement to pilot an "Open Doors" brokerage approach matching landlords of empty properties with community groups looking for space was welcome, and we would like to see this go further across the country and sustained over time. The Task Force could disseminate best practice and learning from the pilot.*

A city-wide strategic approach to dealing with the visual aspect of empty shops in Launceston could include a register of landlords who own empty shops (as suggested by the High Street Report above) and perhaps also consideration of using a service such as Shopjacket in the UK which provides a range of creative image dressing packages that use imagery of shop interiors to cover the windows and doors or empty stores. This dressing treatment can freshen the look of an empty storefront and provide a creative inspiration for

[32] Heat mapping produced by Ms Julia Ranola, GIS Officer, Cartography, City of Launceston, 2019

how an empty store might be used by a potential tenant. Examples can be found at www.shopjacket.co.uk.

Shop-top Living in the City

The City of Launceston is strongly supportive of encouraging inner-city shop top living and this is a sensible and laudable approach. Towns and cities featuring 'shop top' living enjoy significant benefits which are a result of more people living in the centre. Notably, an increase in the residential population results in safer areas, less reliance on cars, increased mobility and a sense of civic pride and individual wellbeing.

> *When fully realised living above the shop will provide Launceston and its community with considerable benefit. Firstly, there are the urban benefits derived from revitalization: liveability and creating healthy and active places that are safe and enjoyable to live and work in. Secondly there is the value that comes from thinking about the impact a city has in its environment with respect to how it functions, is navigated and the energy it uses for growth and development. Thirdly there is the economic benefit from a strong resilient economy and tourism based in the natural and built assets of the city. And lastly the benefits from used and conserved buildings*.[33]

Having more people in the city centre, during the day but particularly in the evenings would have immense benefits for existing retail and service businesses and would also encourage the opening of new businesses, particularly those focussing on services and food service. The achievement of an effective night-time economy can really only be realised if there is a substantial population actually residing in the city centre who are already 'on the ground' in the evenings and able to provide the impetus for retailers and service businesses to extend their opening hours. Without a significant number of residents in the city, a night-time economy is simply not a viable option for local businesses to engage in.

Commercial Properties Available for Lease or Sale

The City of Launceston has also conducted online research[34] into the number of commercial properties for lease and sale from 2015 to 2019. These searches cover offices, retail, industrial/warehouse, show rooms/bulky goods, land development, hotel and leisure and medical /consulting and are shown in Table 2 (below).

[33] Hill, K.J. 2017. *Sustainable Heritage and 'Shop-Top Living': The Past and Future of Launceston*. Masters Thesis, University of Tasmania.

[34] Online research, Dr Bruce Williams, Senior Economic Advisor, City of Launceston, 2019

Table 2 | Commercial Properties for Lease or Sale in Launceston (Postcode 7250) 2015-2018

Date	**Website**		
	Real Commercial	Harrison Humphreys	Domain Commercial Real Estate*
Number of commercial properties for lease			
14-08-15	272	42	-
04-08-16	235	8	-
08-08-17	258	42	-
21-08-18	219	34	-
21-01-19	238	34	-
22-08-19	243	29	
Number of commercial properties for sale			
14-08-15	122	-	60
04-08-16	116	-	50
08-08-17	87	-	-
21-08-18	49	23	-
21-01-19	67	2	-
22-08-19	33	10	-

*The Domain website now redirects to Real Commercial for commercial listings

The results indicate:

- Over the past year there has been little change in the number of commercial properties advertised for lease.
- Over the past year there has been an increase in the number of properties for sale on one website, but a significant decline on another. This may indicate little change overall.
- Over the period 2017-2018 there has been little change in the number of commercial properties advertised for lease.
- Over the period 2016-2018 there has been little change in the number of properties for sale.

However, both the number of properties listed for sale and for lease have declined and stabilised since 2015. These figures represent an indication of confidence in the local economy.

Quadrant Mall
The current situation in the Quadrant Mall is problematic. An area that should be filled with shops and eateries, providing a pleasant atmosphere and destination is not meeting its potential.

As at July 2019 there were eight vacant premises in Quadrant Mall, and this represents the highest vacancy rate in the Quadrant over the past five years. This is despite significant revitalisation and improvements in the amenity of the Quadrant Mall. Insights gathered by the City of Launceston[35] from Real Estate agents managing the vacant properties in the Quadrant Mall revealed the following:

- There is a lack of foot traffic in the area;
- The majority of current vacant spaces are designed for retail with few spaces suitable for hospitality, in addition the cost to convert premises from retail to hospitality are prohibitive;
- The bay windows on some buildings are not conducive to modern retailing;
- Contrary to popular belief, average rents have reduced – 2014 $23,000+GST+outgoings, 2016 $16,000+GST+outgoings;
- Uncertainty about the bus stop on St John Street is discouraging potential tenants;
- The area is considered to be more conducive to hospitality offerings and relaxation around outdoor dining could increase the likelihood of tenants taking on leases.

Car Parking
Car parking is a major topic of concern and discussion in retail precincts around Australia, where there continues to be a strong reliance on vehicle travel, particularly in those areas that do not offer a sophisticated public transport system. Anecdotally, car parking is an issue for traders in Launceston as well as other cities and towns around Australia.

Mid-sized cities and towns usually feature population sizes that cannot support an effective rail or bus network and so consumers often have little choice but to use their cars for shopping trips to the CBD. Over the years, many people have become accustomed to being able to drive into town and park their cars with relative ease.

The City of Launceston manages 4,643 parking bays with 64% of those off-street and 36% on-street. In addition, there are 2,540 privately owned and operated parking bays available.

The cost of parking in the city is a very modest $2.00 per hour in City of Launceston multi-storey car parks and the City of Launceston provides a number of free parking initiatives including free parking between 3.30pm and 5.30pm daily; a free 'park and ride' service and a pensioner parking scheme providing three hours of free parking each week.[36]

Despite the number of available car parks, the modest price to park and the free parking initiatives offered by the City of Launceston, car parking remains a key topic of concern for retailers in the city and shoppers. Launceston is no different to many other shopping precincts around Australia in this regard. However, there are many factors that are

[35] Personal communication, Mr Doug Stevenson, Business Development Officer, City of Launceston, 2019
[36] Data provided by Mr Andrew Frost, Manager Parking and Carr Villa, City of Launceston, 2019

impacting on the retail environment that have already been outlined in this report and car parking should be considered as just one of those factors 'in the mix'. That said, people's perceptions about the role of car parking and city visitation are important and need to be addressed.

Demand for Retail Labour

The demand for retail labour has decreased significantly over the past ten years. Data provided by .id (www.id.com.au) shows over the past decade Tasmania lost 1,976 FTEs (-2,273+297) in retailing[37] (see table below).

Full-time equivalent employment by industry sector

export reset

Tasmania	2017/18			2008/09			Change
Industry (Click rows to view sub-categories)	Number	%	Australia%	Number	%	Australia%	2008/09 to 2017/18
Agriculture, Forestry and Fishing	12,069	6.1	3.2	15,400	7.8	3.9	-3,331
Mining	4,321	2.2	2.4	2,800	1.4	2.0	+1,521
Manufacturing	15,671	8.0	8.2	20,065	10.2	10.6	-4,394
Electricity, Gas, Water and Waste Services	3,727	1.9	1.3	3,197	1.6	1.3	+530
Construction	21,910	11.1	10.7	18,125	9.2	10.2	+3,785
Wholesale Trade	5,208	2.6	3.4	8,217	4.2	4.3	-3,009
Retail Trade	18,536	9.4	8.6	20,409	10.4	9.5	-1,873
• Motor Vehicle and Motor Vehicle Parts Retailing	2,221	1.1	0.9	2,065	1.0	1.0	+156
• Fuel Retailing	795	0.4	0.3	884	0.4	0.4	-89
• Food Retailing	6,051	3.1	2.6	5,754	2.9	2.8	+297
• Other Store-Based Retailing	9,142	4.6	4.7	11,414	5.8	5.3	-2,273
• Non-Store Retailing and Retail Commission Based Buying	327	0.2	0.1	293	0.1	0.1	+35
Accommodation and Food Services	11,798	6.0	5.7	11,829	6.0	5.4	-32

During the same time-frame, the City of Launceston lost 423 FTEs (-452 + 29) in the retail sector[38] (see table below).

[37] https://economy.id.com.au/tasmania/employment-by-industry-fte?sEndYear=2009&BMID=50#

[38] https://economy.id.com.au/northern-tasmania/employment-by-industry-fte?sEndYear=2009&WebID=140

Full-time equivalent employment by industry sector

City of Launceston	2017/18			2008/09			Change
Industry (Click rows to view sub-categories)	**Number**	**%**	**Regional TAS%**	**Number**	**%**	**Regional TAS%**	**2008/09 to 2017/18**
Agriculture, Forestry and Fishing	507	1.6	10.0	764	2.2	12.7	-256
Mining	151	0.5	3.5	84	0.2	2.2	+67
Manufacturing	1,866	5.8	9.7	2,973	8.7	12.2	-1,108
Electricity, Gas, Water and Waste Services	618	1.9	1.4	512	1.5	1.2	+106
Construction	3,020	9.4	10.8	3,003	8.8	8.8	+18
Wholesale Trade	1,005	3.1	3.1	2,022	5.9	4.7	-1,017
Retail Trade	3,897	12.1	9.5	4,158	12.2	10.1	-261
• Motor Vehicle and Motor Vehicle Parts Retailing	722	2.2	1.2	572	1.7	1.1	+150
• Fuel Retailing	103	0.3	0.5	106	0.3	0.5	-3
• Food Retailing	969	3.0	3.2	940	2.8	3.0	+29
• Other Store-Based Retailing	2,036	6.3	4.4	2,488	7.3	5.3	-452
• Non-Store Retailing and Retail Commission Based Buying	67	0.2	0.2	52	0.2	0.2	+16
Accommodation and Food Services	2,036	6.3	5.7	2,093	6.1	5.9	-58
Transport, Postal and Warehousing	1,349	4.2	5.5	1,561	4.6	5.7	-212

This data uses the Australian and New Zealand Standard Industrial Classification (ANZSIC) codes. These codes provide the basis for the standardised collection, analysis and dissemination of economic data on and industry basis for Australia and New Zealand and ANZSIC is the standard industrial classification that underpins ABS and Statistics NZ industry statistics. The Shopping in the City research project also uses the ANZSIC codes for classifying retail respondents.

Food Retailing captures the following sectors: Supermarket and Grocery Stores, Specialised Food Retailing (including liquor retailing) and Other Store-Based Retailing captures Furniture, Floor Coverings, Houseware and Textile Goods Retailing; Electrical and Electronic Goods Retailing; Hardware, Building and Garden Supplies Retailing; Recreational Goods Retailing; Clothing, Footwear and Personal Accessory Retailing; Department Stores; Pharmaceutical and Other Store-Based Retailing.

These figures indicate that retailing has undergone a restructure and is perhaps becoming more efficient in the utilisation of labour

Marketing the City – The Role of Cityprom

Cityprom is tasked with marketing the city centre. Funded by the City of Launceston, the volunteer board and staff of Cityprom work with member businesses to promote Launceston as an attractive visitor destination. Cityprom manage a calendar of city events and promotions including Crazy Day, Christmas, and other events designed to bring people into the city. In addition, Cityprom manage the VIBE! Program which aims to activate 'the City through project, creative activities, precinct development and beautification or marketing and promotion.'[39] The VIBE! Program provides access to advice, assets and

[39] Cityprom. www.cityprom.com.au/vibe

equipment, grants and sponsorship, and the program has supported various projects including the Launceston Night Market, Mad Hatter's Twilight Festival, Launceston Like a Local and the Kingsway Parklet among others.

It may be timely for Cityprom to devise and manage a fully integrated marketing campaign for the city centre to encourage visitation and to provide a sense of 'place' and 'pride' for the businesses trading in town. Whilst one-off events provide short-term benefits by bringing people into city areas, these benefits are usually not sustainable in the longer-term and there is little empirical evidence that they have direct benefits for retailers in terms of increased footfall, sales or repeat shopping.

In terms of events such as Crazy Day, participation from smaller retailers and from large national chains can be very challenging. From a small retailer perspective, many simply don't have sufficient stock levels to offer genuine sale items, and larger retailers (national chains) are often not able to participate due to restrictions from the national office. The subsequent 'scattergun' approach for these types of events is not effective and can result in disappointed customers and retailers.

The author of this report has provided advice to Hobart City Council on the Super Sidewalk Saturday event (which is similar to the Crazy Day event) which did not support the investment of time and finances into this particular annual event. The following was tabled at the Economic Development and Communications Committee Meeting held on 26 July 2018 and the author's recommendation was adopted by Council.

> *4.31. Dr Louise Grimmer, from the University of Tasmania was also asked to provide feedback on the event and thought that the Super Sidewalk Saturday event does not provide ongoing benefit for city retailers. The letter is attached as Appendix A.*
>
> *4.31.1. 'In my opinion, these events (usually held annually on a single day and often in the Winter months) are losing their effectiveness as consumers and the retail industry increasingly require more sophisticated, sustainable and long-term initiatives to satisfy a variety of marketing and sales objectives.*
>
> *I believe that funding for the Super Sidewalk Saturday events would be better utilised in long-term, sustainable marketing initiatives that serve to build on the work the City Marketing team and the Hello Hobart program are already undertaking.*
>
> *This work is focused on building the brand of the City of Hobart as a destination featuring an array of boutique, national and international retailers, as well as fine food and more casual and innovative eateries. I don't believe the Council should continue with the Super Sidewalk Saturday event and that funding for this event should be utilised to support other sustainable marketing initiatives and long-term branding programs.'*

Physical Retail Location and Consumer Shopping Behaviour

A central business district (CBD) location provides *retailers* with a number of advantages including the ability to leverage shoppers who are drawn to the area during business hours, high levels of pedestrian traffic, shoppers coming to the city via public transport and customers who are residing in the city. On the flip side, evening and weekend trade tends to slow in some city areas and parking can be challenging. The selection of a location type should reinforce a retailer's strategy and be consistent with the shopping behaviour of consumer's in the retailer's target market; the size of the target market; the retailer's positioning in the minds of the target market. The following is a general location and retail format 'match':

- Department stores - Regional mall, Central business district
- Speciality apparel – Central business district, Regional mall
- Category specialists – 'Big box' centres, Free standing
- Supermarkets – Strip shopping centres

A critical factor affecting the type of location that *consumers* select to visit is the *shopping situation* in which they are involved. Three types of shopping situation are convenience shopping, comparison shopping and specialty shopping. For the purposes of this discussion, 'location' refers to the location of physical stores and the types of shopping refer to physical as opposed to online shopping.

Convenience Shopping
When consumers are engaged in convenience shopping, they are primarily concerned with minimising effort to get the product or service they want. They are usually insensitive to price and indifferent to which brands they purchase. This means they don't spend very much time evaluating different brands or retailers; the main consideration is to make the purchase as quickly and easily as possible. Examples of convenience shopping include general supermarket shopping, buying a coffee during a lunch break, filling the car with petrol.

Retailers targeting customers involved in convenience shopping usually locate their stores close to where their customers are and make it easy for them to access the location, park their car and make the purchase.

Comparison Shopping
Customers involved in comparison shopping have a good idea of what type of product they want, but don't necessarily have a strong preference for brand, model or retailer. Comparison shoppers are more involved in the purchase decision than convenience shoppers. 'Big box' developments, enclosed malls or shopping districts devoted to particular types of merchandise attract consumers by facilitating comparison shopping activities. Comparison shopping makes 'category killers' (e.g. Office Works, Bunnings, JB Hi-Fi etc) destination stores, i.e. places where consumers will shop even it if is inconvenient.

Specialty Shopping
Customers engaged in specialty shopping know what they want and are unwilling to accept

a substitute. They are brand and/or retailer loyal and will pay a premium or expend extra effort to purchase exactly what they desire. Examples of these types of shopping situations including purchasing organic fruit and vegetables, a high-end mountain bike or a luxury car. The retailers selling these types of speciality goods are 'destination' stores and customers engaged in speciality shopping are willing to travel to an inconvenient location. Indeed, having a convenient location is not as important for retailers offering unique products or services.[40] Central Business Districts provide ample opportunities for consumers wanting to undertake specialty shopping activities.

Competing Shopping Areas in Launceston

In addition to competition from online and national/international chain retailers, city traders also compete with other shopping areas including Kings Meadows, Mowbray, the Kmart centre, Newstead and Prospect. Also, the big box development on the outskirts of the city centre housing Bunnings, JB HiFi, Office Works etc. is a drawcard for many consumers.

Suburban shopping centres or shopping precincts are attractive to consumers for a variety of reasons including fulfilling mostly convenience shopping activities. These centres are within close proximity to home or work and feature the inclusion of anchor supermarkets (usually Coles or Woolworths), free parking and undercover shopping. Suburban centres offer a variety of stores, with a mix of independent businesses and national chains. The value proposition is 'one-stop' shopping (particularly the provision of a supermarket) which appeals to various segments.

The following tables detail the retail mix for three suburban centres that are in the City of Launceston's jurisdiction (based on visitation by the author on 30 and 31 March 2019):

Although the Launceston Plaza on Racecourse Crescent has relatively few retail outlets (compared with other suburban shopping precincts), the main drawcard is Kmart as well as the Coles supermarket. This centre is located on the outskirts of the CBD and features plentiful parking on a completely flat site. Kmart is open 24 hours and the centre is usually busy particularly on the weekends. The Plaza is surrounded by numerous 'big box' and other retail outlets including a Chemist Warehouse.

Table 3 | Launceston Plaza Retail Centre Mix

Kmart	Coles Supermarket
Just Baker	Phone Accessories Concession
Wendy's	Key Cutting and Shoe Repairs
Newsagency	Butcher
Chicken Specialty Butcher	9/11 Bottleshop
Priceline Pharmacy	

[40] Levy, M., Weitz, B.A. and Grewal, D. 2019. Retailing Management. New York: McGraw Hill.

The Mowbray Marketplace is relatively new and features two distinct shopping 'centres' divided by an outdoor carpark. An undercover walkway (roof only) allows shoppers to cross from one building to the other through the carpark. There is plentiful parking on a flat site and this development is situated nearby other retail and service outlets on Invermay Road including another Coles supermarket and various fast food chains.

Table 4 | Mowbray Marketplace Retail Centre Mix

Mowbray Beauty	Chemist Warehouse
Target	Dental Town
Daigou Polar Express	R&D Coffee
Reject Shop	Woolworths Supermarket
Bargain Butcher	Post Office
Baker's Delight	Newsagent
Charcoal Chicken Shop	BWS Bottleshop (nearby)

Meadow Mews at Kings Meadows offers a significant number of retail and service outlets in an undercover setting. The site is flat with ample carparking. This centre is located in the middle of a wider shopping precinct along the main road in Kings Meadows.

Table 5 | Kings Meadows (Meadow Mews) Retail Centre Mix

Donut King	Phone Accessories Concession
Chinese Massage	Aussie Homeloans
Cellarbrations	Banjos
MyState	Rockmans
EB Games	Noni B
Pharmacy with Adrian and Serena's Gifts	Nextra Newsagency
Wendy's	Just Cuts
Williams Shoes	APIA Insurance
Millers	OPSM
Sanity	Just Jeans
Butcher	Sushi Plus
Telstra	Hairworks
Minkin Bazaar	Quikfix Key Cutting
Nature's Works	TSG Tobacco Station
Baker's Delight	Coles Supermarket

Suburban shopping centres/areas in Launceston, including those detailed above, are primarily satisfying *convenience* shopping behaviours, particularly through the provision of supermarkets, butchers, bakeries etc. Because these centres usually offer free parking, undercover shopping and a range of retail outlets and services, many suburban centres are increasingly also providing limited comparison and speciality shopping experiences for consumers, most notably Meadow Mews in Kings Meadows, and therefore attracting shoppers away from the city centre.

Methodology

Research Approach
The aim of this study is to identify the factors that are considered to be important for encouraging, as well as hindering, shopper visitation to city centre in Launceston; identify specific changes and improvements that might be made by individual businesses and stakeholder organisations to improve individual business performance as well as the shopping experience for customers, and identify participant perceptions of the various factors for which City of Launceston has responsibility (in terms of implementing, changing or improving).

The study adopted a cross-sectional approach by examining a collection of people (see sample frame below) at a single point in time. This 'snapshot' approach is not designed to capture particular processes of change, so it is therefore suitable for providing a detailed analysis of a relatively large-scale study of participants.

The study utilised a quantitative and qualitative methodology; involving primary research in the form of surveys with retail and service business owners in the CBD, key stakeholders from business organisations and city centre consumers (shoppers). The study also utilised observational studies and analysis of secondary data.

Retailer and service business surveys were administered using the 'drop and collect' method which involved hand delivering a survey package to every business within the Cityprom boundary and then later individually collecting completed surveys. This method has been shown to yield higher response rates from small business owners than mailed, online or telephone surveys. Surveys were mailed or hand delivered to key stakeholder groups and an online survey was administered for shopper.

Survey questions were composed of a mix of subjective ranking questions, open-ended questions and Likert scaling method on a 1-7 scale (for retail/service businesses only).

Sample Characteristics
The population for this study were:

Group 1 | All retail and service businesses operating in the Cityprom boundary area (see Appendix 2) in the Launceston CBD;
Group 2 | Consumers who shop in the city;
Group 3 | Key stakeholders from the Launceston business community, and
Group 4 | Employee stakeholders from the City of Launceston.

Group 1 | Retail and Service Businesses
250 survey packages were hand delivered (using the drop and collect method) on 11 April to all retail and service businesses within the Cityprom boundary. Surveys were then collected from each business on 17 April and 24 April. In addition, some businesses returned the survey to the Chief Investigator via mail or email.

In total 99 completed surveys were received, providing a response rate of 39.6%. An acceptable response rate for SME surveys is considered to be 15% (+/- 4)[41]. Noting that SME researchers are frequently challenged by a reluctant population and low response rates,[42] [43] [44] the response rate for this study of almost 40% is very satisfactory, and the findings can therefore be considered generalisable across the population of interest. There was one survey returned which was unusable, leaving a final usable sample of 98 surveys.

Retail Classification Codes

Respondents were asked to classify their business according to one of the nine Australian and New Zealand Standard Industry Classification (ANZSIC) retail sector classification codes.[45] In terms of retail classification (see Table 6), the two largest sectors to respond were clothing, footwear and personal accessories at 28.57%, and pharmaceutical and other store-based retailing at 11.22%. There were 33.67% of respondents who did not answer this question.

Table 6 | ANZSIC Retail Classification Codes

ANZSIC Codes	*N*	*%*
Supermarket and grocery store	0	0
Specialised food retailing	8	8.16
Furniture, floor covering, house wares and textiles	6	6.12
Electrical, electronic and gas appliances	1	1.02
Hardware, building and garden supplies	0	0
Recreational goods	8	8.16
Clothing, footwear and personal accessories	28	28.57
Department store	3	3.06
Pharmaceutical and other store-based retailing	11	11.22
No response	33	33.67
Total	*98*	*100.00*

Age of Business

Respondents were asked how many years the business has traded in the city, with just over half of respondents trading between 6 and 25 years. A small proportion of respondents (7%) had been in business less than two years, and 1% did not answer this question (see Table 7).

[41] Woodside, AG. 2014. Theory, data analysis, and writing for publication workshop. *Global Innovation and Knowledge Academy (GIKA) Conference*, Valencia, Spain, 7-10 July.

[42] Billesback, T.J. and Walker, J. 2003. Stalking Goliath: what successful businesses are doing against major discount chains. *Journal of Business and Entrepreneurship*, 15: 1-17.

[43] Dennis, W.J. 2003. Raising response rates in mail surveys of small business owners: results of an experiment. *Journal of Small Business Management*, 41(3): 278-295.

[44] Newby, R., Watson, J. and Woodliff, D. 2003. SME survey methodology: response rates, data quality and cost effectiveness. *Entrepreneurship Theory and Practice*, 28(2): 163-172.

[45] Australian Bureau of Statistics. 2013. *1292.0 Australian and New Zealand Standard Industrial Classification (ANZSIC), 2006 (Revision 2.0).*

Table 7 | Age of Business

Age	*N*	*%*
Less than 2	7	7.14
2 – 5	14	14.28
6 – 15	28	28.57
16 – 25	23	23.46
26 – 50	17	17.34
51 and over	8	8.16
No response	1	1.02
Total	*98*	*100.00*

Number of Employees

Table 8 gives an indication of the range of numbers of employees as an indication of the size of the business. Non-employing businesses accounted for 4.08% of respondents who operated with no additional staff apart from the owner/manager. Micro-businesses, that is businesses with 1-4 employees, accounted for 43.87%, 2.04% of businesses employed volunteer staff in addition to the owner/manager.

Table 8 | Number of Employees

Size	*N*	*%*
Owner/Manager plus volunteer staff	2	2.04
Non-employing businesses	4	4.08
Micro (1 – 4 employees)	43	43.87
Small (5 – 19 employees)	44	44.89
SME (20 and over)	5	5.10
No response	0	0
Total	*98*	*100.00*

Procedure

For data collection, the survey was hand delivered and subsequently collected from all potential respondents. In order to maximise the response rate a variety of standard approaches were employed including:

- A relatively short survey;[46 47]
- A cover letter with university sponsorship;[48 49 50 51]
- The assurance of anonymity[52 53 54]
- Follow-up and collection[55 56]
- A 'user-friendly' survey design and format[57]

The survey package (see Appendix 3) therefore included: a paper survey (2 x double sided A4 pages), a cover letter on sponsor (University of Tasmania) letterhead explaining the importance of the study for retailers operating in the Launceston CBD and the guarantee of anonymity of responses for all participants, and a collection envelope for completed surveys.

Methodological Considerations

In order to ensure the study, which utilised a self-report survey, was developed and administered appropriately, issues regarding common method bias were considered. Method variance[58] is the variance attributed to the specific method used to collect data. It is argued that such variance may lead to spurious conclusions about the significance of effects which in reality may simply be attributable to data being collected in a similar manner;

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[46] Jobber, D. and Saunders, J. 1993. A note on the applicability of the Bruvold-Comer model of mail survey response rates to commercial populations. *Journal of Business Research*, 26(3): 223-236.

[47] Yammarino, F.J., Skinner, S.J. and Childers, T.L. 1991. Understanding mail survey response behaviour: a meta-analysis. *Public Opinion Quarterly*, 55(4): 613-639.

[48] Faria, A.J. and Dickinson, J.R. 1992. Mail survey response, speed and cost. Industrial Marketing Management, 21(1): 51-60.

[49] Faria, A.J. and Dickinson, J.R. 1996. The effect of reassured anonymity and sponsor on mail survey response rate and speed with a business population. *Journal of Business and Industrial Marketing*, 11: 66-76.

[50] Greer, T.V. and Lohita, R. 1994. Effects of source and paper colour on response rates in mail surveys. *Industrial Marketing Management*, 23(1): 47-54.

[51] Schneider, K.C. and Johnson, J.C. 1995. Stimulating response to market surveys of business professionals. *Industrial Marketing Management*, 24(4): 265-276.

[52] Futrell, C. and Hise, R.T. 1982. The effect of anonymity and same day deadline on the response rate to mail surveys. *European Research*, October: 171-175.

[53] Kanso, A. 2000. Mail surveys: key factors affecting response rates. *Journal of Promotion Management*, 5(2): 3-16.

[54] Tyagi, P.K. 1989. The effect of appeals, anonymity, and feedback on mail survey response patterns from salespeople. *Academy of Marketing Science Journal*, 17(3): 235-241.

[55] Greer, T.V., Chuchinprakarn, N. and Seshadri, S. 2000. Likelihood of participating in mail survey research. *Industrial Marketing Management*, 29: 97-109.

[56] Trentelman, C.K., Irwin, J., Petersen, K.A., Ruiz, N. and Szalay, C.S. 2016. The case for personal interaction: drop-off/pick-up methodology for survey research. *Journal of Rural Social Sciences*, 31(3): 68-104.

[57] LaGarce, R. and Kuhn, L.D. 1995. The effect of visual stimuli on mail survey response rates. *Industrial Marketing Management*, 24: 11-18.

[58] Campbell, D.T. and Fiske, D.W. 1959. Convergent and discriminant validation by the multitrait-multimethod matrix. *Psychological Bulletin*, 56: 81-105.

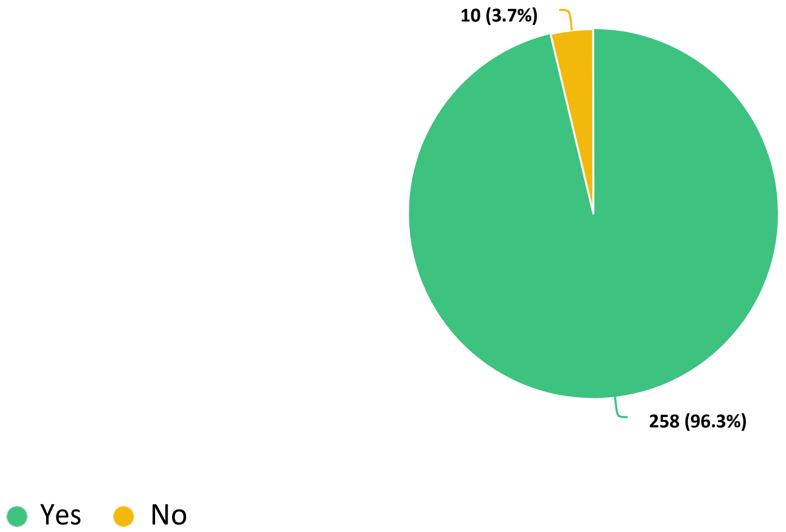
hence the term 'common method bias'.[59] Self-report surveys are most commonly the subject of concern about the effect of common method variance on results, and a number of methods have been proposed to either control method variance or to show it has little effect on results.[60] Method variance should be addressed in the planning stages of a study, rather than accounted for at the data analysis stage when a satisfactory solution may not exist.[61] This study therefore attempted to address issues of common method bias during the planning/procedural stage. Anonymity of response, used to counter possible social desirability,[62] was used as a procedural remedy for common method bias

Group 2 | Consumers who Shop in the City

The City of Launceston facilitated an online version of the survey using the 'Your Voice Your Launceston' online platform. The survey was marketed via the City of Launceston communications, the website, and a media release resulting in two articles published in *The Examiner* newspaper.

The survey opened on Thursday 11 April 2019 and closed on Sunday 5 May 2019. A total of 268 usable shopper responses were collected using this method. 258 respondents (96.3%) had shopped in the city centre in the past six months and 10 respondents (3.7%) had not.

Figure 3 | Have you Shopped in the Launceston City Centre in the Past Six Months?



[59] Podsakoff, P.M., MacKenzie, S.B., Lee, J.Y. and Podsakoff, N.P. 2003. Common method biases in behavioural research: a critical review of the literature and recommended remedies. *Journal of Applied Psychology*, 88(5): 879-903.
[60] Spector, P.E. and Brannick, M.T. 2010. Common method issues: an introduction to the feature topic in 'Organizational Research Methods'. *Organizational Research Methods*, 13(3): 403-406.
[61] Brannick, M.T., Chan, D., Conway, J.M., Lance, C.E. and Spector, P.E. 2010. What is method variance and how can we cope with it? A panel discussion. *Organizational Research Methods*, 13(3): 407-420.
[62] Milfont, T.L. 2009. The effects of social desirability on self-reported environmental attitudes and ecological behaviour. *The Environmentalist*, 29(3): 263-269.

The majority of respondents reside in the 7248, 7249 and 7250 postcode areas (*n*=222).

Table 9 | Postcode

Postcode	*n*	*%*
7212	1	0.37
7248	35	13.05
7249	31	11.56
7250	156	58.20
7252	12	4.47
7253	3	1.11
7254	1	0.37
7258	2	0.74
7259	1	0.37
7260	1	0.37
7265	1	0.37
7267	3	1.11
7270	2	0.74
7275	2	0.74
7276	1	0.37
7277	7	2.61
7300	2	0.74
7301	4	1.49
7303	1	0.37
7304	2	0.74
Total	*268*	*100.00*

Group 3 | Key Stakeholders from the Launceston Business Community

Surveys were mailed to key stakeholders (*n*=29) from the following organisations: Cityprom (staff and board members), Launceston Chamber of Commerce (staff and board members), Department of State Growth, Regional Development Tasmania, and Northern Tasmania Development Corporation. A total of nine completed surveys were returned, representing a 31% response rate. All nine surveys were usable.

Group 4 | Employee Stakeholders from the City of Launceston

Surveys were distributed to stakeholders from the City of Launceston (staff) (*n*=30). A total of 24 completed surveys were returned, representing an 80% response rate. All 24 surveys were usable.

Ethical Considerations

The study was approved through the University of Tasmania's Human Ethics Research Committee (approval number H0017968). The cover letter included in each survey package highlighted the fact that participation for voluntary and that the survey was designed to be completed anonymously. The letter for retailers also included instructions for completing and returning the survey (utilising the drop and collect method). Potential participants were assured of confidentiality and anonymity throughout the entire survey process and provided with the contact details of the Chief Investigator if they had questions or concerns about the research. No contact was received by the researchers in this regard. In addition, no issues were raised with the University's Human Ethics Research Committee by those approached to participate in the study, nor by any of the eventual participants in the study.

Analysis and Results

The following section presents the results of the data analysis and is divided into individual sections for each group of respondents.

Data were analysed using the program Leximancer.[63] Leximancer is a computer-generated methodology for content analysis of text to reveal concepts, themes and relationships amongst the words therein. One of the outputs is a concept map (which can be manipulated within the program) on which sample characteristics (e.g. 'shops', 'mall', 'toilets' etc) can be overlaid.

> *Concepts in Leximancer are collections of words that generally travel together throughout the text. For example, a concept 'building' may contain the keywords mill, warrant, tower, collapsed, etc. These terms are weighted according to how frequently they occur in sentences containing the concept, compared to how frequently they occur elsewhere. Sentences are tagged as containing a concept if enough accumulated evidence is found.*
>
> *The concepts are clustered into higher-level 'themes' when the map is generated. Concepts that appear together often in the same pieces of text attract one another strongly, and so tend to settle near one another in the map space. The themes aid interpretation by grouping the clusters of concepts, and are shown as coloured circles on the map. The themes are heat-mapped to indicate importance. This means that the 'hottest' or most important theme appears in red, and the next hottest in orange, and so on according to the colour wheel.*
>
> *In the Concept Map, concepts (the small grey nodes) are grouped into themes (the larger coloured bubbles).*[64]

Concept maps have been generated for Groups 1, 2 and 4 (retail/service businesses; city shoppers; employee stakeholders from the City of Launceston) for all the qualitative survey questions and presented in the next section of the report. Because the response rate was so low for Group 3 (Key stakeholders from the Launceston business community) there was not enough data to generate meaningful representation of responses using Leximancer. The full text responses from this group have therefore been included in a table and presented in the next section of the report.

[63] http://info.leximancer.com/
[64] Leximancer Pty Ltd (2018) Leximancer User Guide, Release 4.5. Copyright, Leximancer Pty Ltd.

Group 1 | Retail and Service Businesses

Question 4
Does your business have a website?

Table 10 | Business Website

Website	*n*	*%*
Yes	74	75.51
No	22	22.44
No response	2	2.04
Total	*98*	*100.00*

The above table indicates that approximately three-quarters (75.51%) of the businesses in the sample have a website. For those businesses with an average annual sales turnover of under $100,000, most did not have a website; for those with an average annual sales turnover of over $100,000, most did have a website.

Question 5
Is the website e-commerce enabled (i.e., has a shopping cart for online shopping)?

Table 11 | Website with e-Commerce

Website with e-Commerce	*n*	*%*
Yes	47	63.51
No	27	36.48
No response	0	0
Total	*74*	*100.00*

The above table shows that of those businesses who have a website, a little under two - thirds (63.51%) have e-commerce capability. This translates to just under half of the overall sample (47.96%).

Question 6
Do you offer a 'click and collect' service (i.e., customers buy online and pick up in-store)?

Table 12 | Click and Collect

Click and Collect	*n*	*%*
Yes	27	57.44
No	20	42.55
No response	0	0
Total	*47*	*100.00*

The above table shows that of those businesses who have a website with e-commerce capability, over half have a ‘click and collect’ service (57.44%). This translates to under a third of the overall sample (27.55%).

Question 7

Do you offer any deferred or interest free payment options such as Afterpay, etc.?

Table 13 | Interest-free Payment Options

Interest-free Payment Options	*n*	*%*
Yes	48	48.97
No	50	51.02
No response	0	0
Total	*98*	*100.00*

The above table indicates that approximately half (48.97%) of the businesses in the sample provided interest-free payment options to customers. Those businesses that provided this option tended to be larger (employing more staff) than those that did not, and also had higher average annual sales turnover. In addition, no specialised food retailing business offered interest-free payment options to customers.

Question 8

If you answered ‘yes’ to Question 7, which options do you offer?

Interest-free payment options offered were: Afterpay, Zippay, Easypay, OpenPay, Royal Pay, Latitude, Certigy, Zipmoney, Humm as well as traditional Lay-By and store credit programs. The most popular option was Afterpay.

Question 9

Which social media accounts does your business run?

Table 14 | Social Media

Social Media	*n*	*%*
Facebook	86	87.75
Twitter	10	10.20
Instagram	61	62.24
Snapchat	2	2.04
LinkedIn	6	6.12
Other (Pinterest x1 and YouTube x 2)	3	3.06
We don’t use social media	7	7.14
Total	*98*	*100.00*

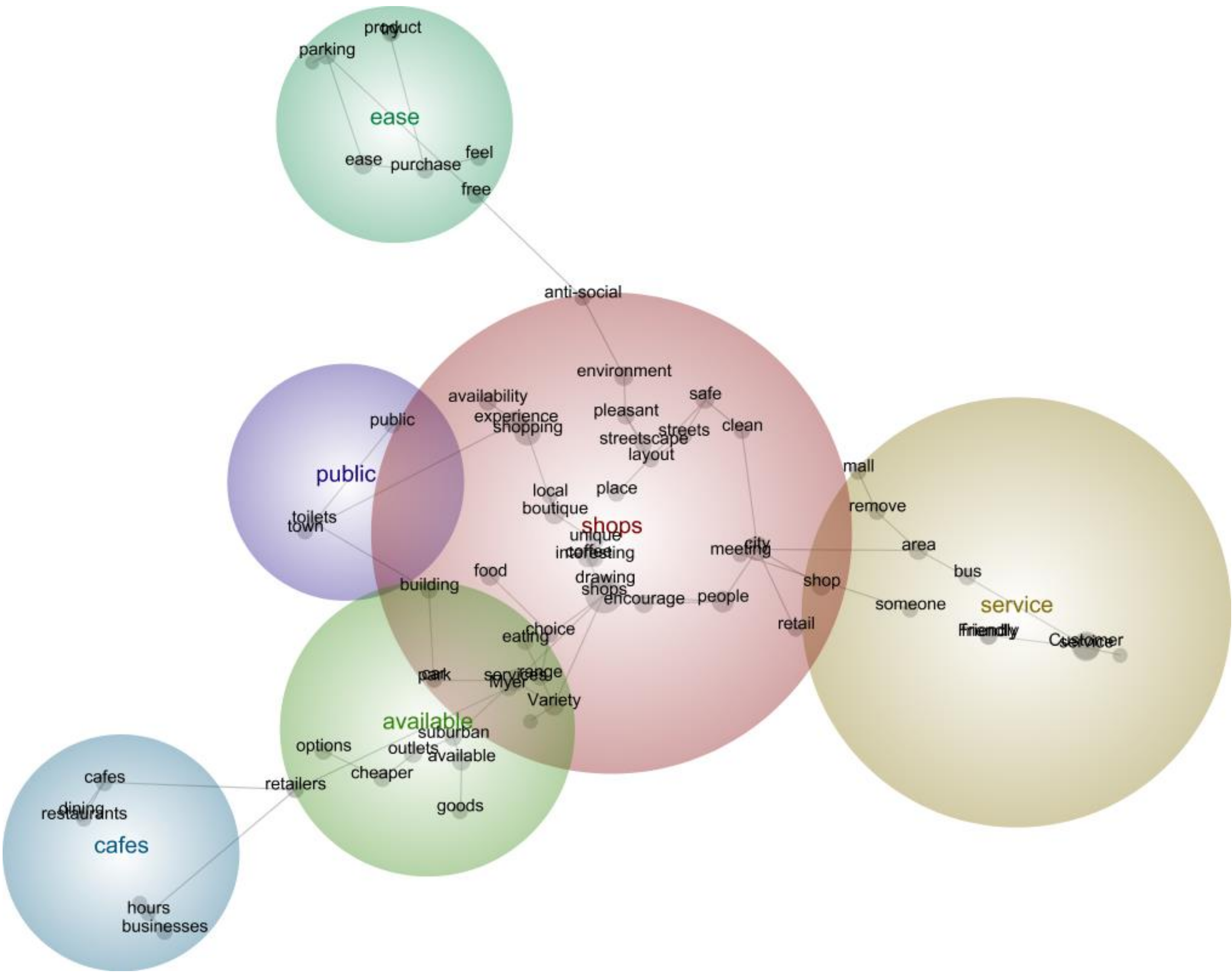
Here the data shows the most commonly used social media platform is Facebook. This is followed by Instagram. Other such as Snapchat and LinkedIn are not commonly used. Only 7% of the sample of businesses indicated that they did not use social media.

Question 10

*What are the top five factors that you consider **encourage** people to shop in the Launceston CBD (please list in order of importance, with 1 being the most important).*

The following figure provides the concept map showing which factors business owners consider encourage people to shop in the Launceston CBD.

Figure 4 | Factors that Encourage Shopping in the City



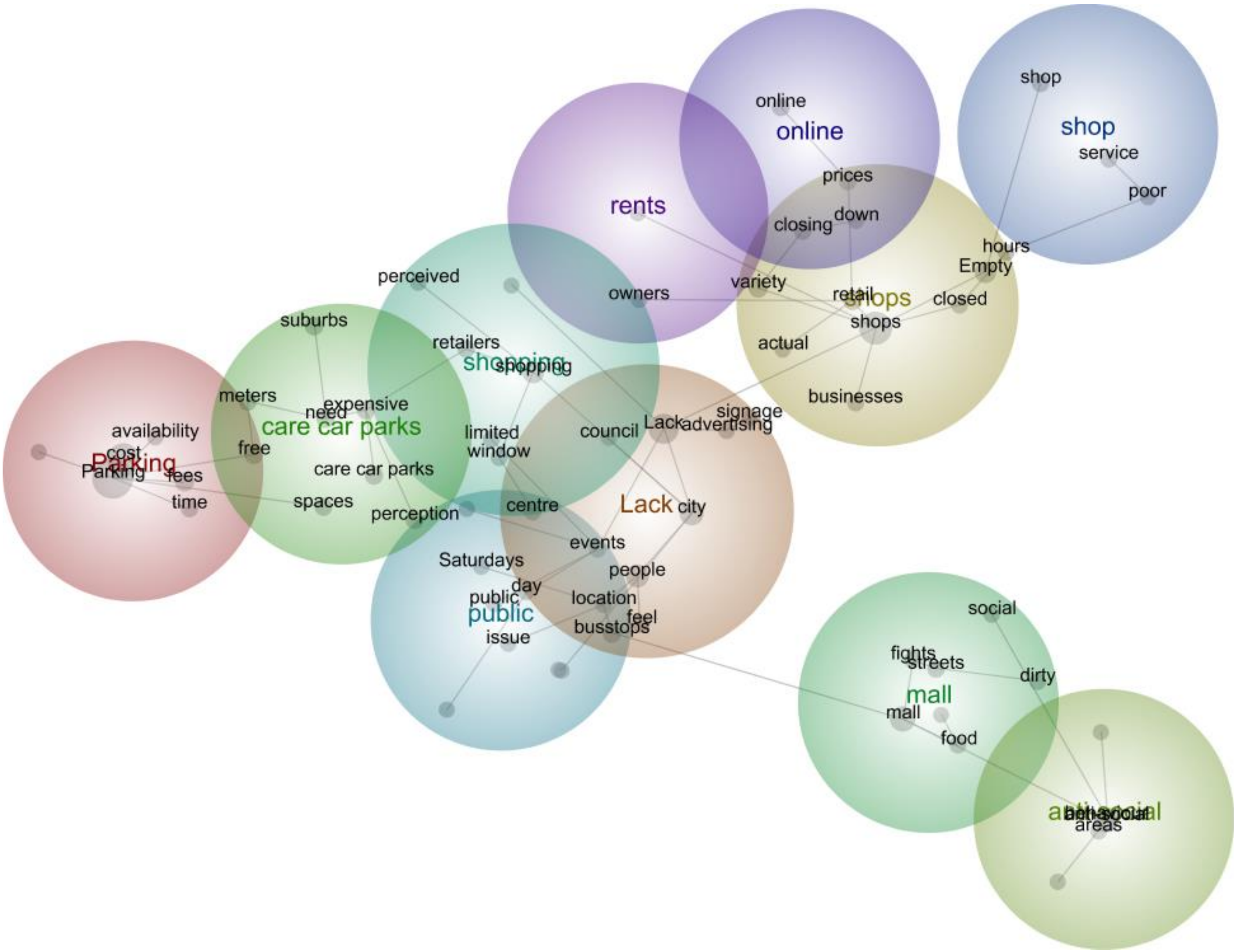
The ‘hottest’ theme in the above figure centres around the **shops** in the city, and this encompassed a range of concepts including variety, unique, boutique, and range, as well as related concepts such as pleasant, experience, interesting, and availability. The next most important theme concerns **service**, including concept such as friendly and customer (oriented), and also the bus service. The next theme of **public** picks up concepts of public toilets and public transport (ease of), The next theme is **available**, which has overlap with the first theme of shops, and adds the concepts of options, outlets, cheaper, park(ing) and specific retailers such as Myer. The final theme of **cafés** picks up the importance of having good cafés, a café lifestyle, and independent cafés.

Question 11

*What are the top five factors that you consider **hinder** people from shopping in the Launceston CBD (please list in order of importance, with 1 being the most important).*

The following figure provides the concept map showing which factors business owners think discourage people from shopping in the Launceston CBD.

Figure 5 | Factors that Discourage Shopping in the City



The ‘hottest’ theme in the above figure concerns **parking** in the city, and incorporates concepts such as cost/expense, availability, time (limits), and (having) coins. **Care Car Parks**, though not as ‘hot’, also attracted its own theme, particularly with regard to the concept expensive. A theme concerning **lack** follows, which included concepts such as (lack of) stores, culture, variety (in contrast to the first question), central toilets, and parking. **Shops** was the next most important theme, though in contrast to the previous question, this time related concepts included closed, closing (down), empty, and vacancy.

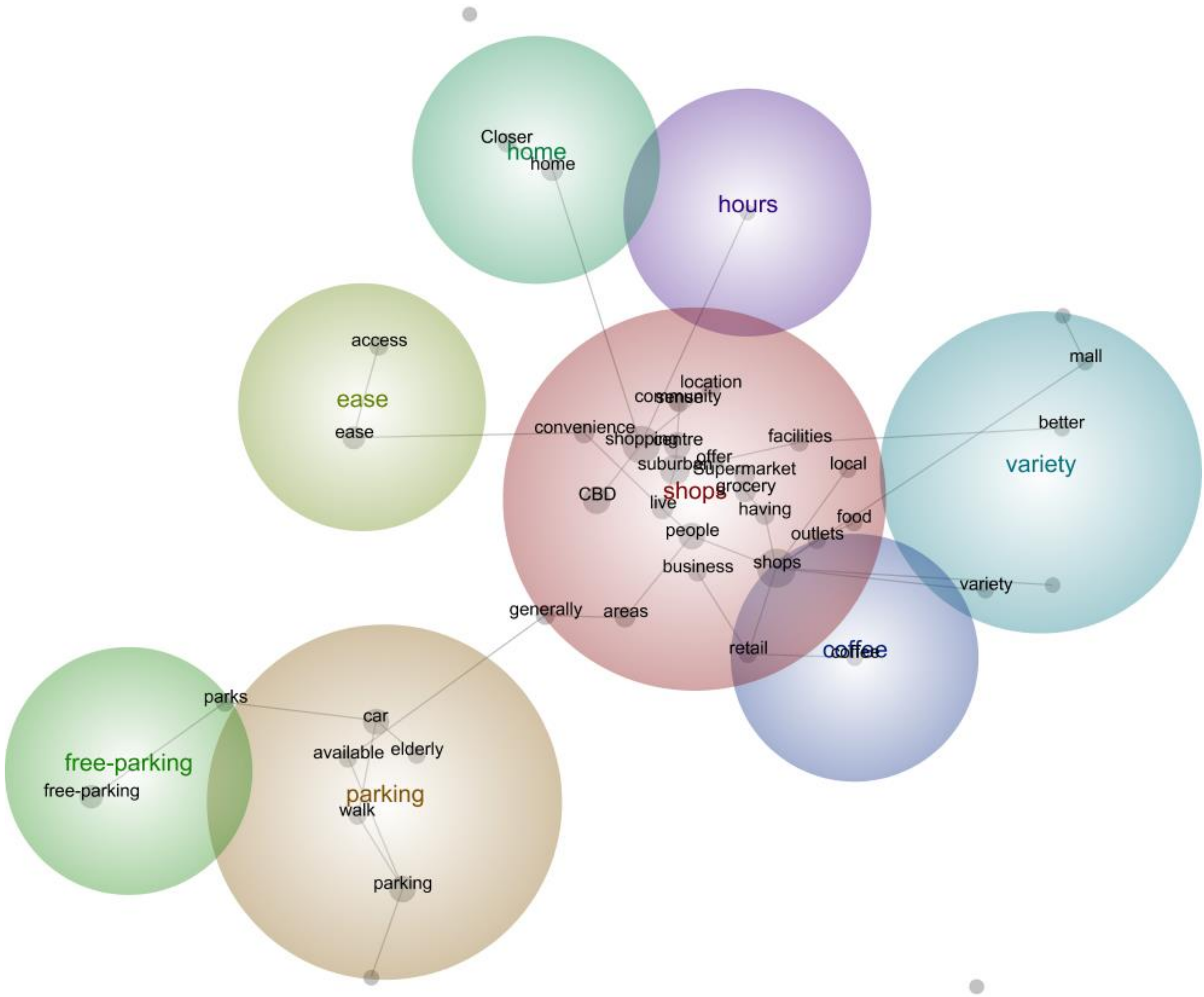
There was overlap in the next themes of the **mall** and **anti-social** (behaviour), which contain concepts such as fights, dirty, (police) presence, and loitering. Other themes contained issues such as (high) **rents** and **online** shopping, which took away the need to go into the city.

Question 12

*Thinking about the reasons why shoppers may choose to shop in other shopping locations (e.g. Mowbray, Kings Meadows, Newstead, etc.), what are the top five factors that you consider **encourage people to shop in other locations?***

The following figure provides the concept map showing which factors business owners think encourage people to shop in other shopping locations (suburbs) outside the city.

Figure 6 | Factors that Encourage Shopping in Other Locations



The ‘hottest’ theme in the above figure, similar to Question 10, centres around **shops**, in this case in the suburban shopping locations, and this encompasses a range of concepts including convenience, (co-location with) supermarkets, facilities, (being under-cover and thus) temperature-controlled, and sociability. **Parking** was the next most important theme, overlapping with the additional theme of **free-parking**, with concepts such as ease, convenience, (short) walking distance, (being) available, (easier for the) elderly, and quick. The theme of **home** was next hottest, predominantly concerning being closer to home. Other themes covered factors such as **ease** (and access), **variety**, (opening) hours and (meeting for) **coffee**.

Question 13

What is your current overall assessment of retail trade in the city (please circle one)?

Table 15 | Current Overall Assessment of Retail Trade in the City

Current Overall Assessment of Retail Trade in the City	*n*	*%*
Positive with no room for improvement	0	0
Positive with room for some improvement	22	22.44
Neutral	13	13.26
Negative with room for some improvement	25	25.51
Negative with room for major improvement	36	36.73
No response	2	2.04
Total	*98*	*100.00*

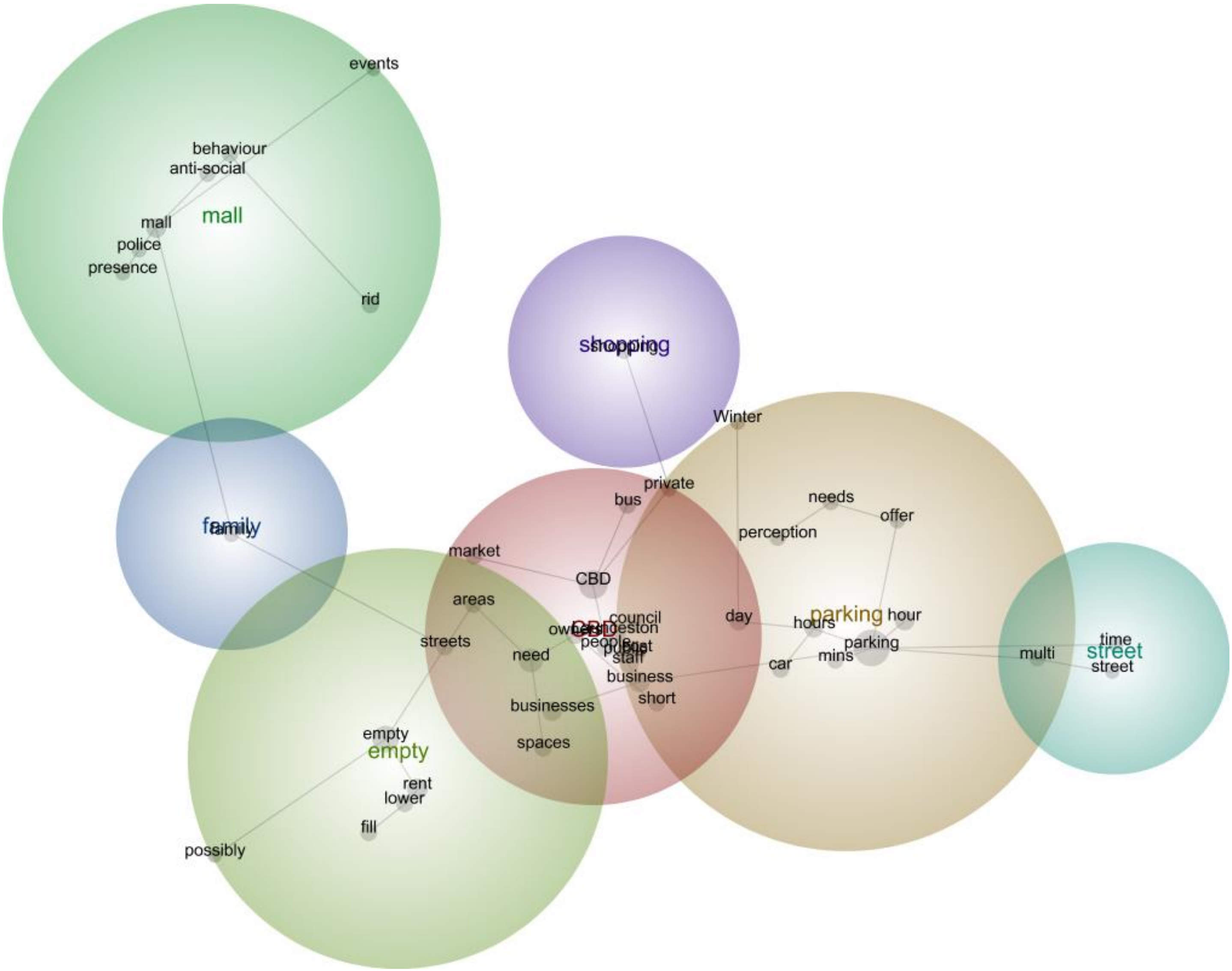
The above table indicates that approximately one-quarter (22.44%) of the businesses in the sample have a positive overall assessment of retail trade in the city, about an eighth (13.26%) are neutral, and slightly under two-thirds (62.24%) have a negative overall assessment. Results from this question are compared later in the report with Question 20 regarding businesses' satisfaction with their overall individual performance.

Question 14

*If you answered 'negative with room for some improvement' OR 'negative with room for major improvement' in the previous question, please list up to three **general improvements that could be made** to encourage people to shop in the city.*

The following figure provides the concept map showing which factors business owners, who have a negative overall assessment of retail trade in the city, think are general improvements that could be made to the city.

Figure 7 | General Improvements to Encourage Shopping in the City



The 'hottest' theme relates to a range of concepts linked to the **CBD**, including (suggestions for what the) Council might do (e.g. improve signage, reduce red tape), (filling empty) spaces (shops), businesses (have lowered rents, working better with other entities), and the CBD needing more (e.g. vibrancy, parking spaces, marketing). The next theme in the above figure, similar to Question 11, concerns improvement in **parking**, with various concepts relating to (parking being) free, or free (for the first one or two) hours, and (addressing the) perception of parking. The next theme concerns **empty** (shops, spaces), and concepts concerning how these vacancies may be filled. The theme of the **mall** mostly concerned concepts surrounding (improving) anti-social behaviour, (a greater) police presence, but also events.

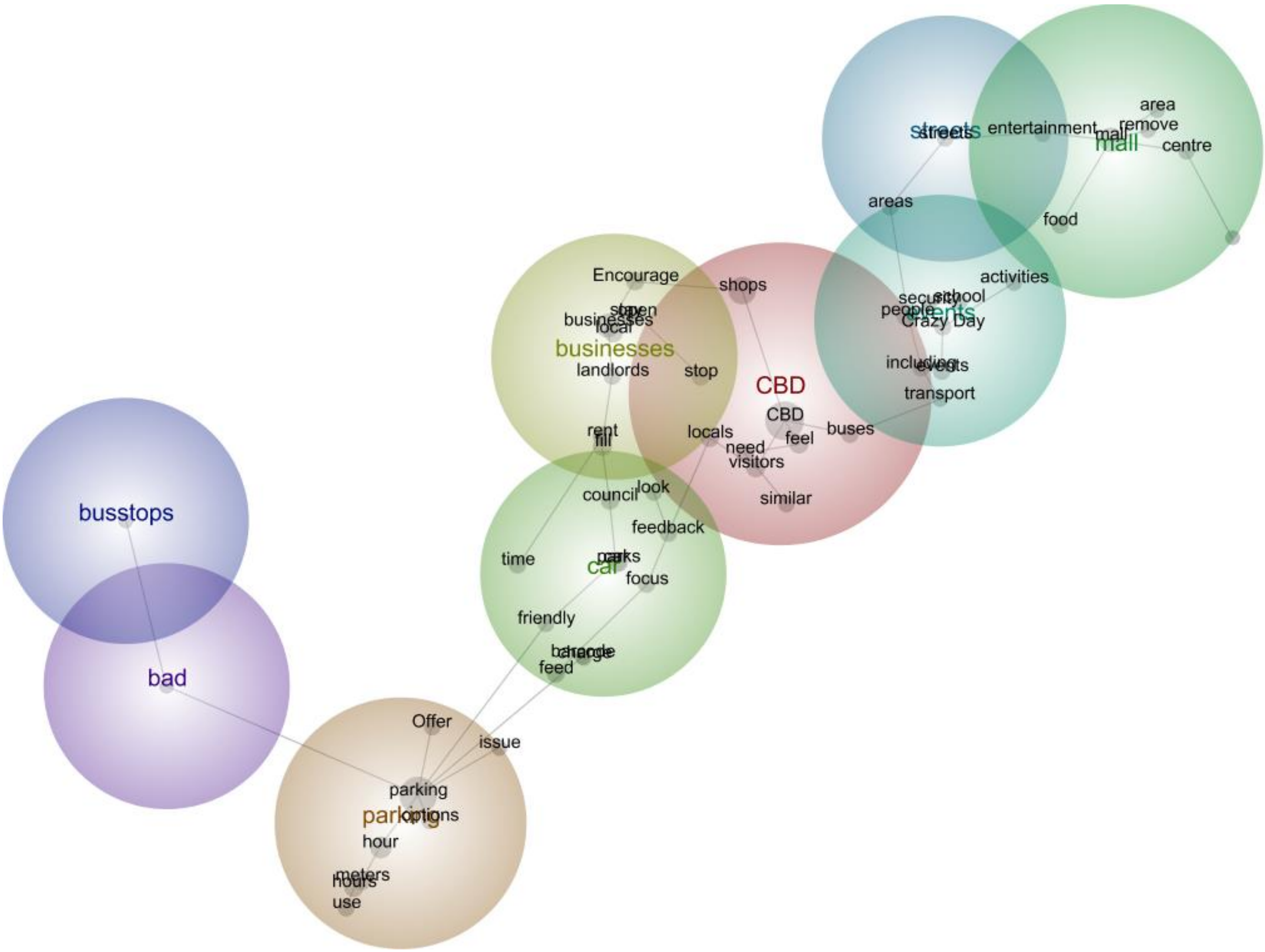
Other themes covered factors such as **family** entertainment, activities, parking and toilets, (removing) **street** parking, and **shopping** (promotion, competition with online).

Question 15

*Please list up to three **improvements the City of Launceston specifically** could make to improve the overall shopping experience in the city.*

The following figure provides the concept map showing which factors business owners think are improvements that could be made specifically by the City of Launceston.

Figure 8 | Specific Improvements by the City of Launceston to Encourage Shopping in the City



The ‘hottest’ theme in terms of importance relates to a range of concepts linked to the **CBD**, which show consistency with Question 14. Related concepts include (encouraging and welcoming) visitors to the CBD, (pop-up) shops, (improving the) feel of the CBD, and (keeping) buses (out of the CBD). This theme also overlaps with that of **businesses** (working with, engaging, supporting). The next theme concerns **parking** (related to the adjacent theme, car) and contains concepts similar to the previous question: options, hours, offer (-

ing free parking), and meters (card as well as coin, cheaper). The next theme of the **mall** overlaps with those of **events** and **streets**, and covers concepts including entertainment, (police) presence, security, activities, (promoting) events, clean (streets), (having an) information booth, and removing (hazards).

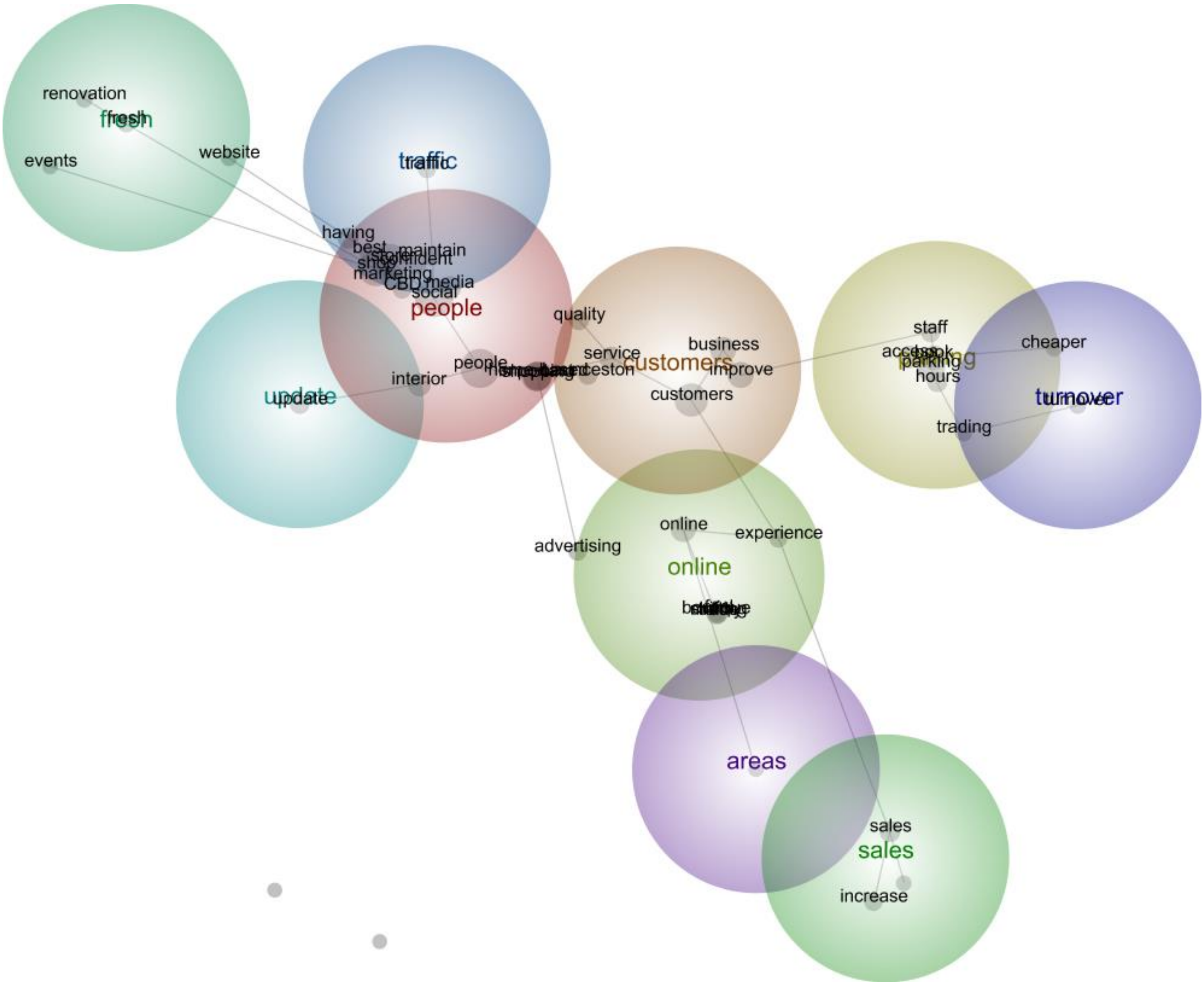
The remaining themes of **bus stops** and **bad** encompass issues of improving safety, relocating bus stops (e.g. from St John Street), and targeting bad behaviour.

Question 16

Please list up to three improvements you would like to make to your individual business.

The following figure provides the concept map showing improvements business owners would like to make to their individual business.

Figure 9 | Improvements to Individual Businesses



The ‘hottest’ two themes in terms of importance concern **people** and **customers**. The concept of people relates to both importance, but also external issues such as people smoking near shops. Other concepts were about (use of) social media, marketing, and (people having) confidence. Increasing customers (profitability), and improving service also relate here. The themes of **update** and **fresh** contain concepts of renovation, updating interiors, updating websites, signage, (security) cameras, and (having) events. Other themes with similarity include **turnover**, **sales**, **online** and **traffic**, and relate to concepts of (increasing) turnover, foot-traffic, online sales, and sales generally.

Other themes relate to **parking** (similar to previous questions) and **areas** (seating).

Question 17
*Over the last three years **sales turnover** for this business has (please circle one).*

Table 16 | Sales Turnover

Sales Turnover	*n*	*%*
Significantly decreased	11	11.22
Decreased	26	26.53
Stayed the same	19	19.38
Increased	29	29.59
Significantly increased	8	8.16
No response	5	5.10
Total	*98*	*100.00*

The above table indicates that over one-third (37.75%) of the businesses in the sample report that their sales turnover has decreased over the past three years, about one fifth (19.38%) are neutral, and over one-third (37.97%) report that their sales turnover has increased.

Question 18
*Over the last three years **customer visitation** for this business has (please circle one).*

Table 17 | Customer Visitation

Customer Visitation	*n*	*%*
Significantly decreased	15	15.30
Decreased	24	24.48
Stayed the same	20	20.40
Increased	28	28.57
Significantly increased	5	5.10
No response	6	6.12
Total	*98*	*100.00*

The above table indicates that nearly two-fifths (39.78%) of the businesses in the sample report that customer visitation has decreased over the past three years, about one fifth (20.40%) are neutral, and about one-third (33.67%) report that customer visitation has increased.

Question 19

*Which one of the following categories best describes the **average annual sales turnover** of the business over the last three years (please circle one).*

Table 18 | Average Annual Sales Turnover

Average Annual Sales Turnover	*n*	*%*
Under $100,000	11	11.22
$100,001 to $500,000	35	35.71
$500,001 to $1,000,000	20	20.40
$1,000,001 to $5,000,000	18	18.36
$5,000,001 and over	2	2.04
No response	12	12.24
Total	*98*	*100.00*

The above table indicates that 11% of respondents report an average annual sales turnover of under $100,000. Of these respondents, 5 did not provide an ANZSIC code at Question 1, but of those that did four were from Code 9 (pharmaceutical and other store-based retailing), one was from Code 6 (recreational goods) and one from Code 7 (clothing, footwear and personal accessories). There were 10 out of the 11 of these respondents who reported trading for 10 years or less, with four respondents trading for two or fewer years, so this may have an impact on responses for this cohort.

In all, the above table indicates that just under half (46.93%) of the businesses in the sample report an average annual sales turnover of under $500,000. Approximately one fifth (20.40%) report $500,000 to $1,000,000, and one fifth above $1,000,000 (20.40%).

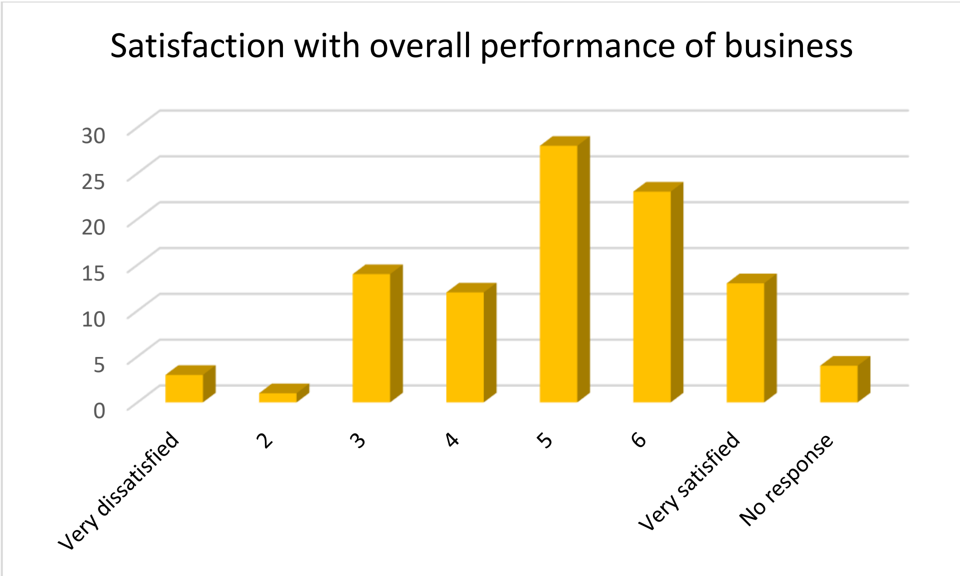
Question 20

How satisfied are you with the overall performance of your individual business (please circle the number which best describes your overall level of satisfaction).

Table 19 | Satisfaction with the Overall Performance of Individual Business

Satisfaction (1 = very dissatisfied to 7 = very satisfied)	*n*	*%*
1	3	3.06
2	1	1.02
3	14	14.28
4	12	12.24
5	28	28.57
6	23	23.46
7	13	13.26
No response	4	4.08
Total	*98*	*100.00*

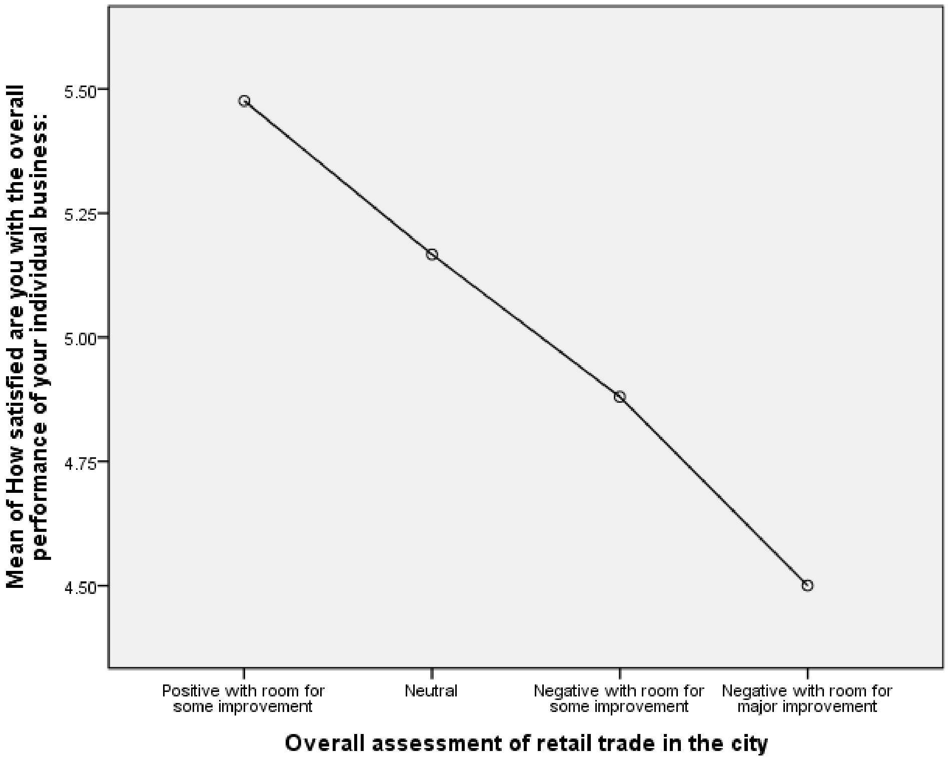
Figure 10 | Satisfaction with Overall Performance of Individual Business



The data in Table 19 and Figure 10 show that approximately 65% of traders are satisfied with the overall performance of their individual business, with median satisfaction rating of 5 out of 7.

A comparison was also made between Question 20 regarding traders' satisfaction with the overall performance of their business and Question 13 regarding their overall assessment of retail trade in the city, this is shown in Figure 11.

Figure 11 | Overall Assessment of Retail Trade and Individual Business Satisfaction



The trend line in Figure 11 shows that traders whose overall assessment of retail trade in the city was positive, reported a higher level of individual business satisfaction compared with those whose overall assessment of retail trade in the city was negative.

A further comparison was made between Question 20 regarding traders' satisfaction with the overall performance of their business and Question 5 regarding their e-commerce offering. In this case no difference was found in terms of satisfaction according to whether or not a business was e-commerce enabled.

Question 21

Any other comments you would like to make regarding shopping in the city in Launceston?

48 out of 98 (48.97%) respondents answered this question. The responses have been collated in an Excel spreadsheet (Appendix 4).

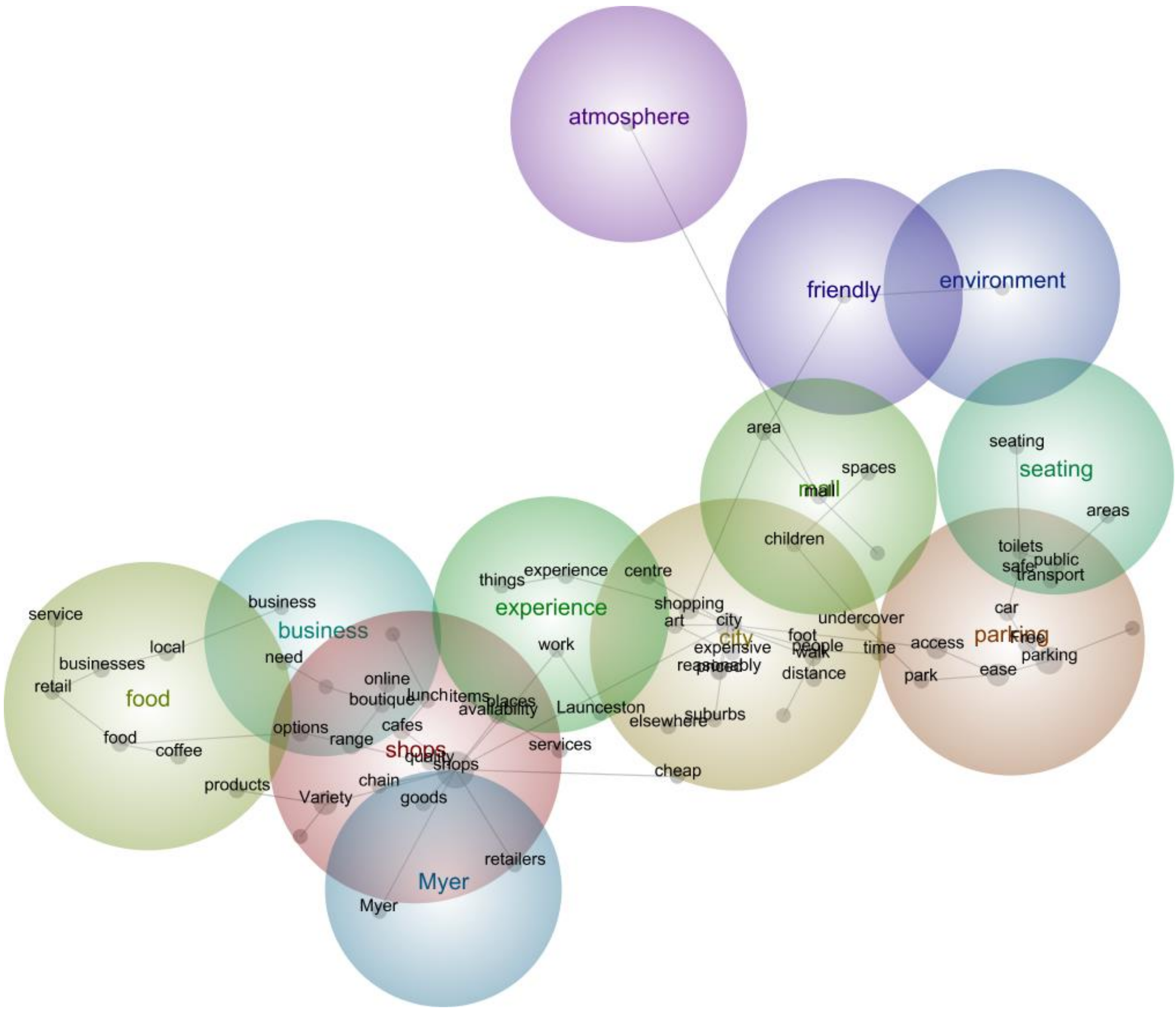
Group 2 | Consumers who Shop in the City

Question 3

*What are the top five factors that you consider **encourage** people to shop in the Launceston CBD (please list in order of importance, with 1 being the most important).*

The following figure provides the concept map showing which factors consumers think encourage people to shop in the Launceston CBD.

Figure 12 | Factors that Encourage Shopping in the City



The larger sample size for this group of respondents results in it being possible to consider a larger number of themes and concepts (for this and subsequent questions). The theme of **shops** is 'hottest' this group, similar to the retail and service businesses, and includes a range of concepts such as variety, range, availability, quality, boutique and chains, as well as cafés and restaurants. This theme also overlaps with the theme **Myer**, as a unique department store, and with that of **business** (small businesses, local businesses). **Food** links to these themes as well, including concepts of coffee, products and service. The next 'hottest' theme is **parking**, with concepts similar to previous questions: free, hours (one or two free), ease and access, as well as mention of public transport in this context.

It seems here that a number of the respondents have interpreted this question as what *would* encourage people to shop in the city versus what *currently did*; the parking comments in particular do not appear to be encouraging factors. This means the responses to the question might best be taken as suggestions, versus comments on the current state.

The theme of **city** appears to be similar to the CBD theme reported by the business owners, and involves concepts such as walking, (on) foot, loyalty, shopping, reasonably-priced, and art, but also, as noted above, less encouraging concepts regarding (the need for) undercover areas. This theme also overlaps with the theme **mall**, which includes concepts such as children (friendly), money (needed to be spent on it), and concerns over the mall upgrade.

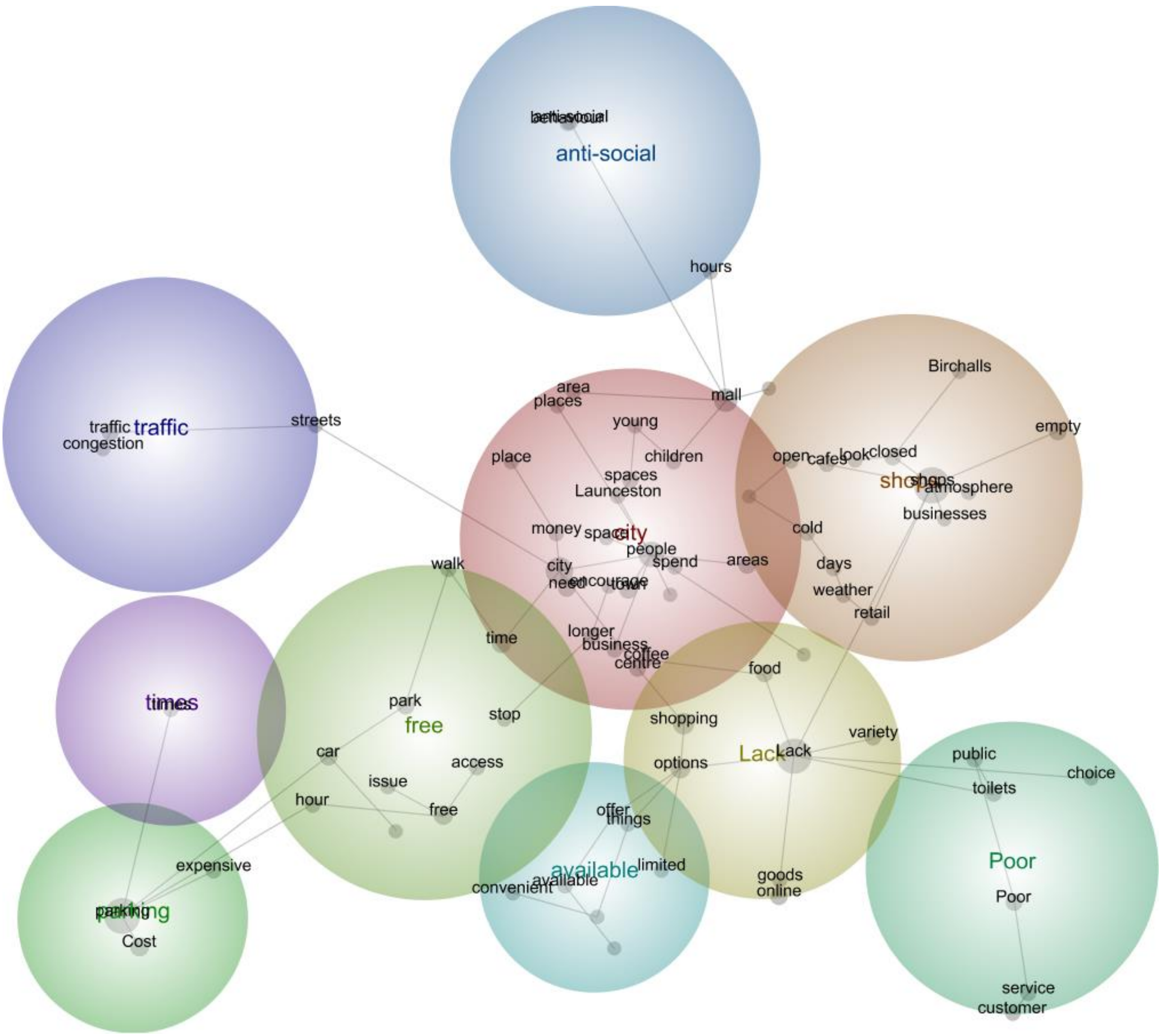
Joining the shops and city themes is one of **experience**, which involves concepts of (having a pleasant) experience, things (to do), and working (in the city). Related to the idea of an experience, are surrounding themes about the **environment**, **atmosphere**, **seating**, and being **friendly**. These all speak to a range of issues concerning what people expect in the city apart from retailers, food outlets and services.

Question 4

What are the top five factors that you consider ***hinder*** *people from shopping in the Launceston CBD (please list in order of importance, with 1 being the most important).*

The following figure provides the concept map showing which factors consumers think discourage people from shopping in the Launceston CBD.

Figure 13 | Factors that Discourage Shopping in the City



The two ‘hottest’ two themes in the above figure are **city** and **shops**, as well as a linked theme of **lack**. In contrast to the previous question, related concepts include lack of variety, food and options, spaces (empty or vacant) or (the need for family, play, parking) spaces and places, and shops being closed or empty (including Birchalls). The weather and cold are also concepts here, as well as the city no longer being relevant. The theme **poor** also figures here in terms of comments on poor customer service, choice and public toilets. The themes of **traffic** (congestion) and **anti-social** (behaviour) also relate to perceptions of what hinder people from shopping in the city.

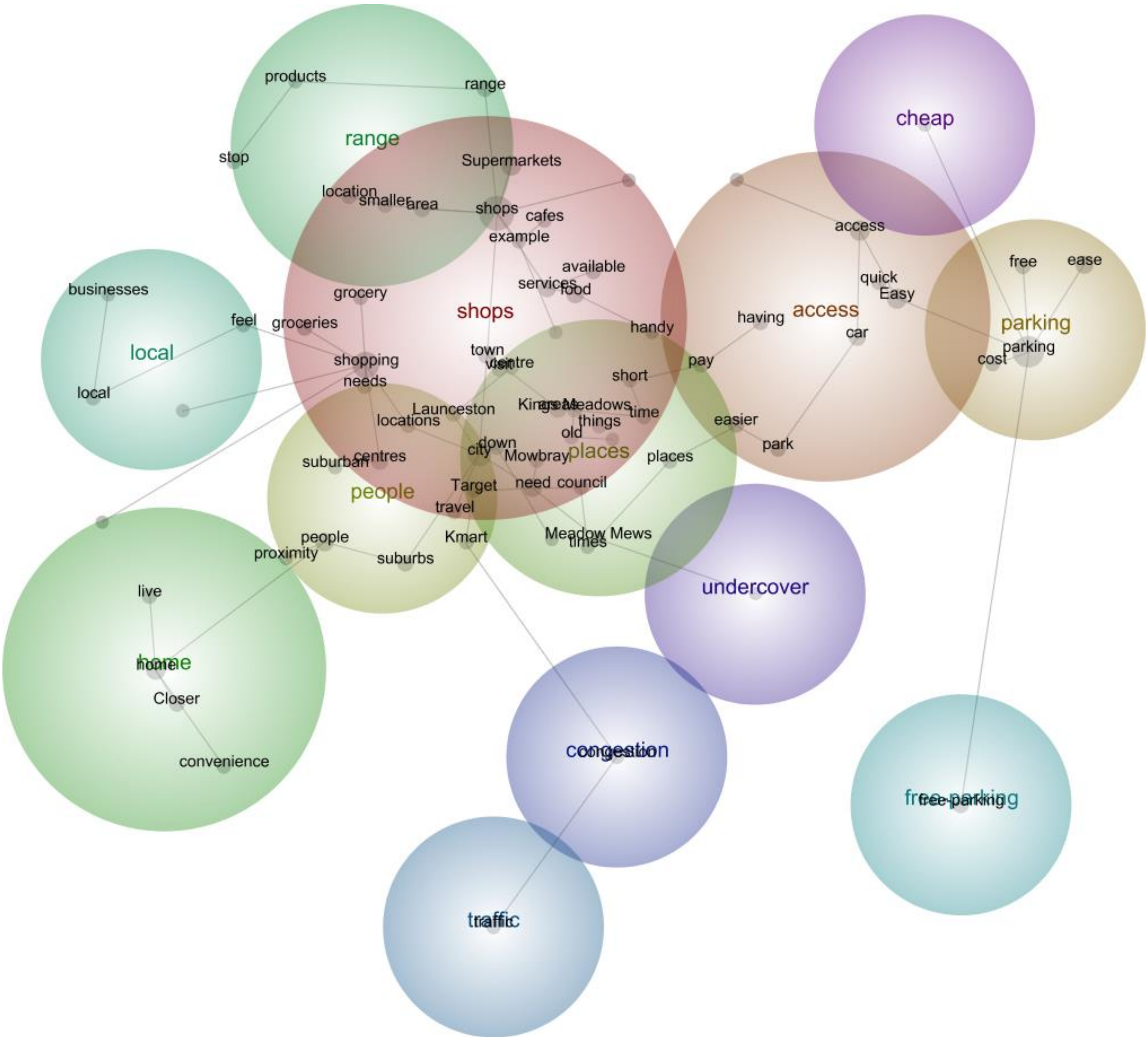
The next themes of **parking**, **times**, **free** and **available** are linked, with concepts on convenience, access, limited, cost, expensive, times, hours, and offer (-ing free parking times).

Question 5

Thinking about the reasons why shoppers may choose to shop in other shopping locations (e.g. Mowbray, Kings Meadows, Newstead, etc.), what are the top five factors that you consider ***encourage people to shop in other locations?***

The following figure provides the concept map showing which factors consumers think encourage people to shop in other shopping locations outside the city.

Figure 14 | Factors that Encourage Shopping in Other Locations



The ‘hottest’ theme in the above figure, similar to Question 12 for the business owners, centres around the **shops** in the suburban shopping locations, and also overlaps with the theme of **places** which refers to specific shopping locations such as Mowbray, Kings Meadows, and Meadow Mews. The shops theme encompasses a range of concepts including (co-location with) supermarkets, groceries, availability, services, food, shopping needs, handy, Target, and cafés. The shops theme also overlaps with **range** and **people**, the latter including comments about the fact that people live in suburbs and not the city, as well as people wanting to shop **local**(ly) (another theme). The **undercover** theme can also be linked to specific places and is similar to that reported by business owners.

The next themes concern related issues of **parking**, **free-parking** and **access**, and also being **cheap**. Relevant concepts include: free, ease, cost, access, quick, easy, and being cheap. Other themes speak to the (lack of) **traffic** and **congestion**.

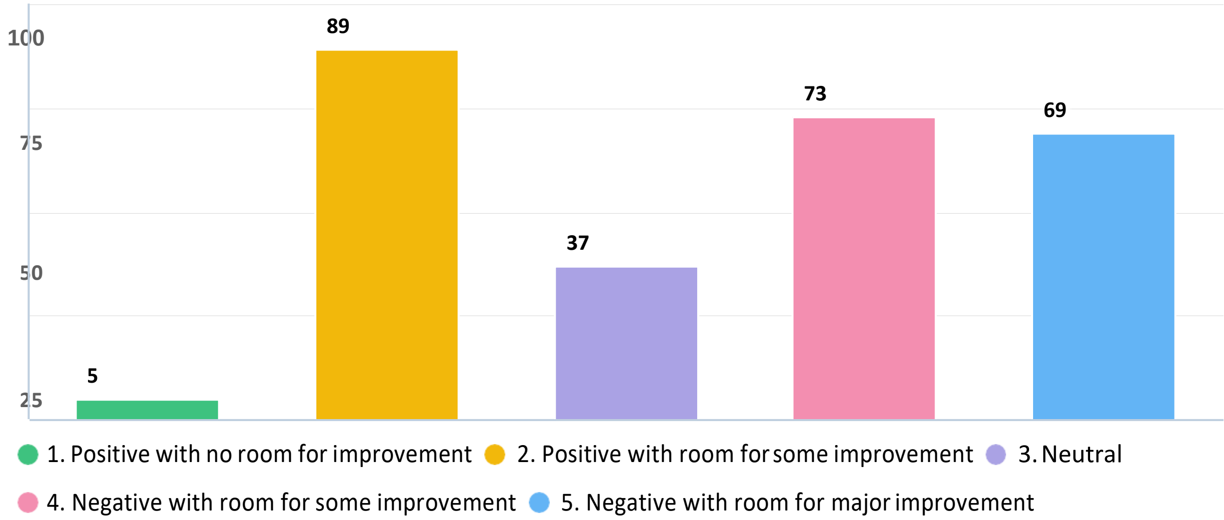
Question 6

What is your current overall assessment of shopping in the city of Launceston?

Table 20 | Overall Assessment of Shopping in the City

Overall Assessment	*n*	*%*
Positive with no room for improvement	5	1.86
Positive with room for some improvement	88	32.83
Neutral	40	14.92
Negative with room for some improvement	72	26.86
Negative with room for major improvement	63	23.50
No response	0	0
Total	*268*	*100.00*

Figure 15 | Overall Assessment of Shopping in the City



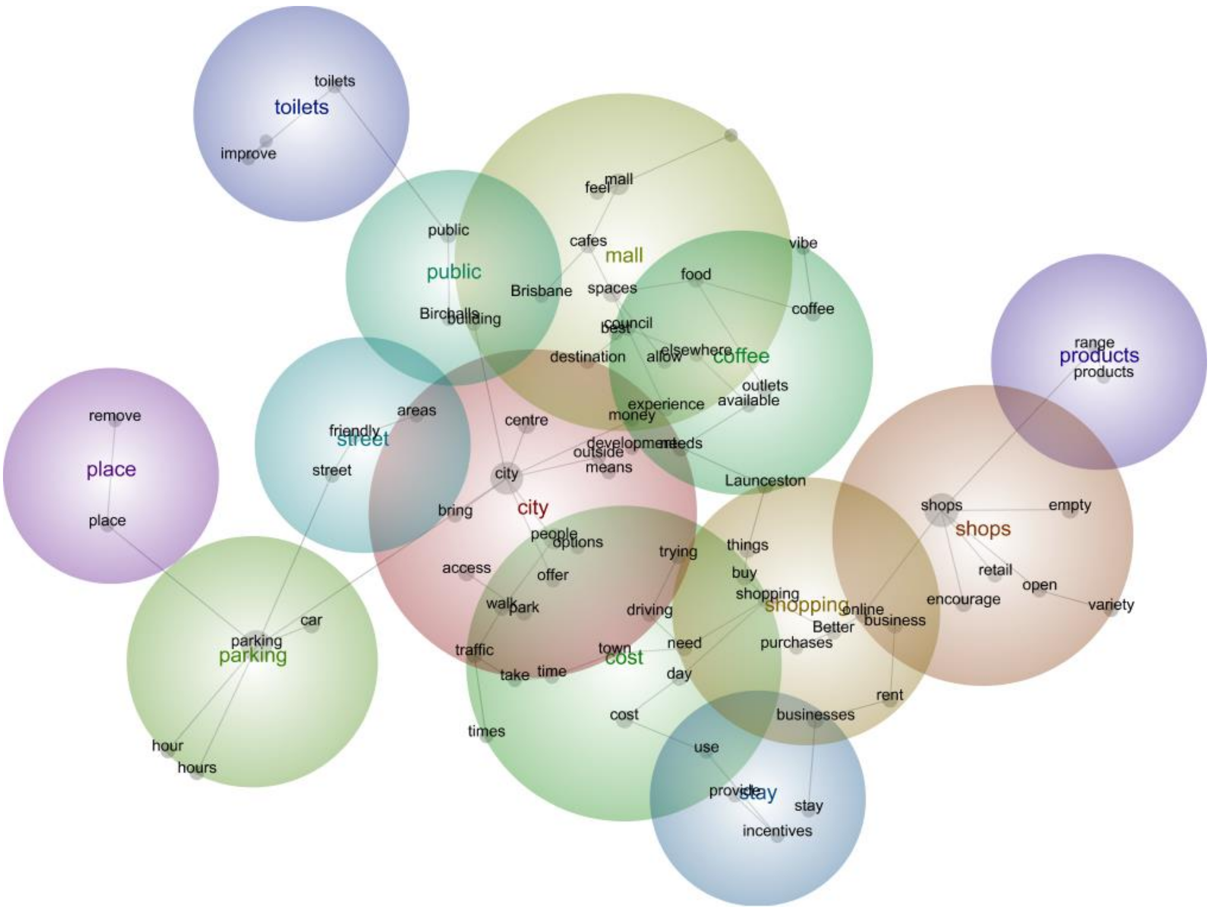
The above Table 20 and Figure 15 indicate that approximately one-third (34.69%) of consumers in the sample have a positive overall assessment of retail trade in the city, over an eighth (14.92%) are neutral, and approximately a half (50.36%) have a negative overall assessment.

Question 7

If you answered 'negative with room for some improvement' or 'negative with room for major improvement' in the previous question, please list up to three general improvements that could be made to encourage people to shop in the city.

The following figure provide the concept map showing which factors those consumers, who have a negative overall assessment of retail trade in the city, think are general improvements that could be made to the city.

Figure 16 | General Improvements to Encourage Shopping in the City



The 'hottest' theme in the above figure concerns general improvements to the **city** or the city centre (e.g. free parking on the edge of the city, more eateries and cafés, upgrading/beautifying the centre, and greening), providing ease of access (to parking, toilets), (making it easy to) walk to the city, and (promotions to) bring people to the city. A line of related themes links the city to **shopping**, **shops** and **products**, which include concepts of range of products, (needing a) variety of shops, (lower) rents, (longer) opening times, and (filling) empty shops (with Birchalls commented on again). The **cost** theme also overlaps the city and shopping themes, and relates to general concepts of driving to town, time cost, traffic, rent, and also relates to the nearby theme of parking. Ways to encourage people to **stay** in the city (another theme) includes the concept of incentives (for accommodation, filling empty shops, eateries in designated areas).

Parking again appears as a theme, though with less intensity, and relates here to concepts about parking hours (free for one or two hours). Parking is also picked up in the nearby theme of **place** (more parking places) though this theme also links to concepts of making the city a more vibrant and safer place. The **street** theme similarly includes (removing) street parking, and also picks up the word friendly (in terms of credit card friendly street parking).

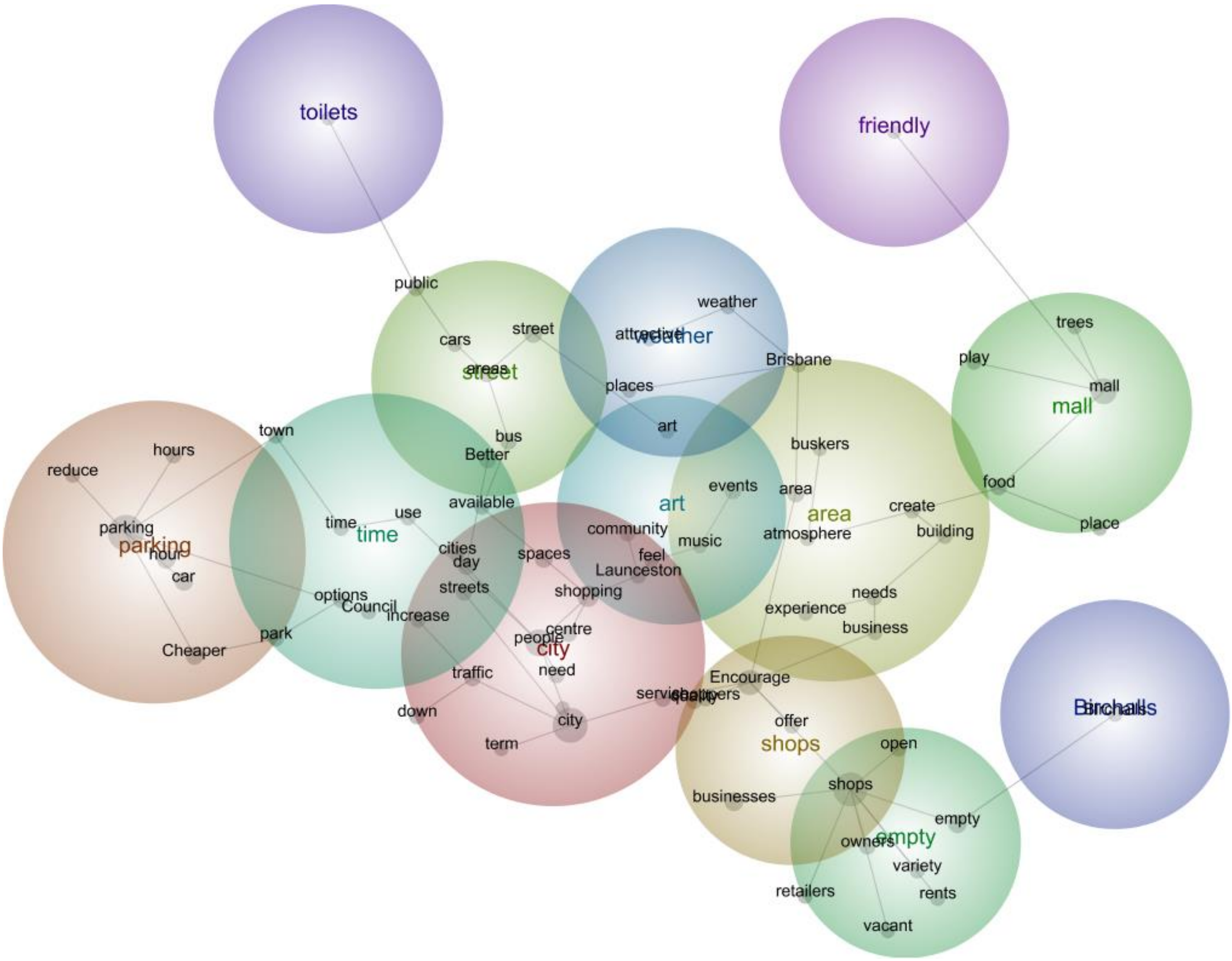
Other themes relate to improvements to the **mall**, with similar comments to previous questions such as (better or more) cafés, (better, family-friendly) spaces, (more) food outlets, and (making it a) destination. The overlap with the theme **coffee** makes sense in this regard. Final themes of **public** and **toilets** refer to (improvements to) public buildings and public toilets.

Question 8

Please list up to three improvements the City of Launceston specifically could make to improve the overall shopping experience in the city.

The following figure provides the concept maps showing which factors consumers think are improvements that could be made to the city specifically by the City of Launceston.

Figure 17 | Specific Improvements by the City of Launceston to Encourage Shopping in the City



Similar to the previous question and the question directed at business owners, the ‘hottest’ theme in terms of importance concerns a number of concepts associated with the **city**. In addition to what has been previously mentioned, concepts included making Launceston (more pedestrianised), encouraging more people (by having inner-city flats), (reducing) traffic on streets, (improving) the shopping experience, and (having more inviting) social spaces. **Parking** is the next ‘hottest’ theme, related to the adjacent theme, **time**, with the recurring concepts of reduced/cheaper costs, and hour/hours (free). The nearby theme of

street covers a range of suggestions including analysing why some streets 'work' and others don't, reducing one-way streets, closing off some streets at specific times (related to the pedestrianisation suggestion), and removing buses from the city centre. This theme is also linked to the theme of **toilets** (public, bright, accessible, clean, family, more).

The remaining themes cluster into two groups, one around **shops**, **empty** and **Birchalls**, and the other around **area**, **art**, **mall**, **weather** and **friendly**. The former concerns again encouragement for businesses to fill empty shops, especially Birchalls (reduced rents, one-off pop-ups, more variety). The latter concerns the general atmosphere of areas in the city including the mall, public art, buskers, community feel, weather-proofing, beautification (trees), events, (making the city more) attractive, and friendly.

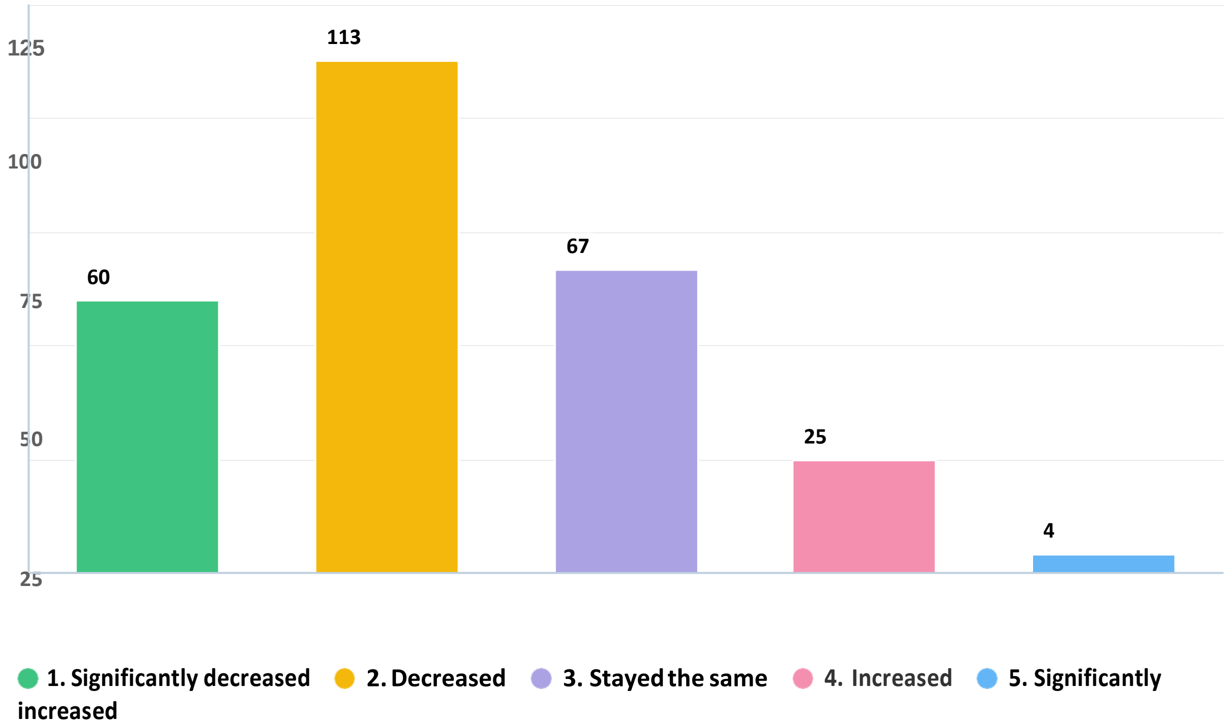
Question 9

In your opinion, over the last three years, customer visitation to the city has (please select one).

Table 21 | Customer Visitation to the City

Customer Visitation	*n*	*%*
Significantly Increased	3	1.11
Increased	25	9.32
Stayed the same	67	25
Decreased	112	41.79
Significantly decreased	59	22.01
No response	2	0.74
Total	*268*	*100.00*

Figure 18 | Customer Visitation to the City



The above Table 21 and Figure 18 indicate that nearly two-thirds (63.80%) of consumers in the sample think that customer visitation to the city has decreased over the past three years, about one quarter are neutral (25%), and under an eighth (10.43%) report that customer visitation has increased.

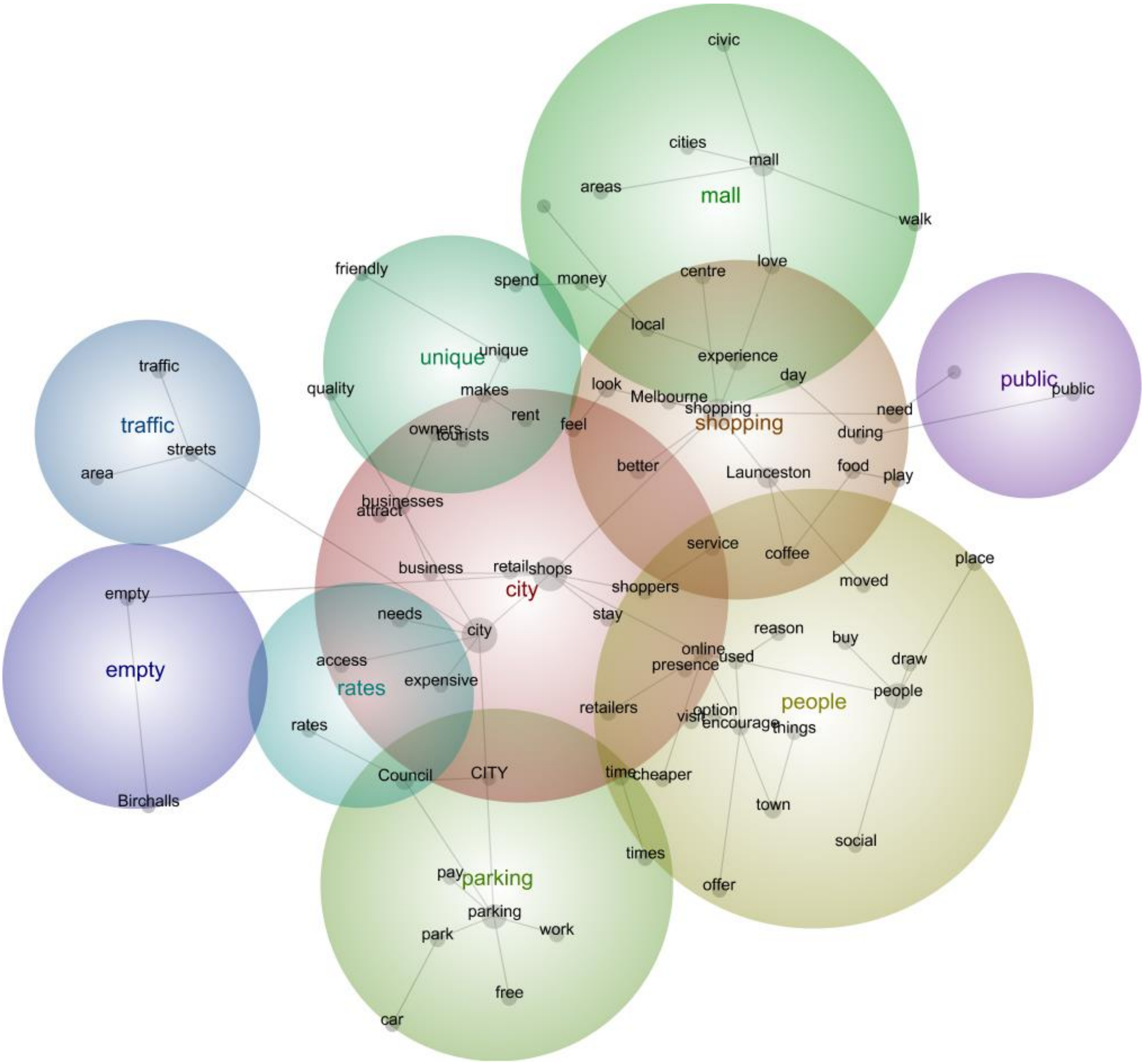
Question 10

Do you have any other comments you would like to make regarding shopping in the city in Launceston?

The following figure provides the concept map showing other comments that consumers made regarding shopping in the city of Launceston.

There were 207 out of 268 (77.23%) respondents who answered this question. In addition to the Leximancer maps (below), the responses have been collated in an Excel spreadsheet (Appendix 5).

Figure 19 | Any Other Comments



Again, the ordering of themes is similar to previous questions. The **city** remains the 'hottest' theme with concepts of attracting businesses and shoppers, (helping) retailers stay open, and owners (reducing) rent. The nearby **rates** theme also speaks to a similar issue. **People** and **shopping** are next 'hottest' and again cover similar ground, with concepts of drawing/encouraging (people in), the social (aspect) of place, food and coffee (more options), (police) presence, better service, and (giving) people a reason to come to town. **Parking** is next with the usual comments, though several people indicated that the issue is not parking (or shopping) but understanding *why* people come into cities in the first place, and that parking won't fix problems associated with lowered levels of visitation.

The **mall** theme is next, encompassing familiar concepts around the experience, play areas, and the look and feel. The remaining themes have fewer concepts but still cover important issues around people wanting something **unique** (including tourists), the importance of **public** places, and the concerns over **empty** shops (including Birchalls) and **traffic** (congestion).

Group 3 | Key Stakeholders from the Launceston Business Community
The response rate from this group of respondents was too low for concepts maps to be meaningfully derived. Hence, the full responses are provided instead.

Question 1
*What are the top five factors that you consider **encourage** people to shop in the Launceston CBD (please list in order of importance, with 1 being the most important).*

Question 1 (1 – most important)
Shops having long opening hours
Good service/experience
Good mix of product categories
Range of stores
Easy accessibility
Convenience of many shops in close proximity
Friendly customer service
Social/personal connections
Goods/service that you want are available
Question 1 (2)
Variety of shops in city
Quality products/services
Good range of shops within common categories e.g. clothing
Local boutiques (quality shopping)
Plenty of parking
Close if they work/live in/near the city
Walkability
Environment/placemaking - a nice place to be
Question 1 (3)
Events and special interest speakers/markets/displays
Walkable city/wayfinding/clean
Social aspects e.g. bumping into friends
Diversity and quality of other CBD offering - food and drinks, services
Cheap parking
Boutique stores
Boutique shops
Convenience
Question 1 (4)
Good food and cafes
Variety of businesses/products/services
Walkability as condensed CBD
Ease of access
Wide variety of locally owned specialty stores
Customer service
Coffee
Transport
Question 1 (5)
Attractive spaces and arcades to walk through a discover

Online presence of stores for research/start buying process
Professionalism and authenticity of businesses
All in walking distance
Easy/cheap parking
Convenient and cheap parking
Accessibility

Question 2

*What are the top five factors that you consider **hinder** people from shopping in the Launceston CBD (please list in order of importance, with 1 being the most important).*

Question 2 (1)
Lack of large national retailers
Parking options (on street and multi-storeys full)
Shrinking levels of discretionary expenditure
Online shopping
(Individual name and business name redacted) Hinder growth and increase negativity
Constant negativity about issues such as parking and shop closures
Competitive online options
Poor service from some store owners
Accessibility
Question 2 (2)
Very spread out
Antisocial behaviour - mall and bus stops
Increasing business, therefore time poor
Suburban shopping centres
(Individual name and business name redacted) Hinder growth and increase negativity
Stores are expensive
Poor online presence
Good and services not available
Question 2 (3)
Limited opening hours (especially late night and Sundays)
Poor service
Specific product or retailer unavailable
Low wages growth
(Individual name and business name redacted) Corruption via council and in for the wrong reasons
Perception of unsafe/rough behaviour in the mall
Lack of 'customer' experience'
Operating hours
Question 2 (4)
Poor online presence of many stores so people who research products to buy before coming in may not know that what they want is in town
Lack of online presence - so not sure if product is available in town
Growing preference for online shopping
Perception of high vacancy rates

(Individual name and business name redacted) Corruption via council and in for the wrong reasons
Negativity of some business owners
Ease of accessing goods online
Question 2 (5)
Dirty/broken utilities (toilets/seats/bins)
Limited 'wow factor' for a shopping experience
Perception of high levels of anti-social behaviour
Anti-social behaviour
1990's perceptions
Transport

Question 3

Thinking about the reasons why shoppers may choose to shop in other shopping locations (e.g. Mowbray, Kings Meadows, Newstead, etc.), what are the top five factors that you consider ***encourage people to shop in other locations?***

Question 3 (1)
Closer to home
Convenience
Extreme value and full line discount retailers
Supermarkets
Elderly people having access to all services in one location
Easy parking and shops that they need clustered together
Confusing bus route timetables
They want groceries
Convenience
Question 3 (2)
Less traffic
Less needs
Preference for convenience over experience
Ease of access
Positive business owners
Near to their home
Fast food
Accessibility
Question 3 (3)
Looking for specific everyday items, not browsing
They mainly shop online
Customer loyalty to local shops
Free parking
Lazy people not wanting to walk too far
Near to supermarket
Don't have the money to shop in town
Transport
Question 3 (4)

No response
Older demographic
Some specialist retailers
No response
Some of our population can't afford to shop
Near to schools
Banking only
Parking
Question 3(5)
Groceries - can't shop in town - no deli/grocer
Low income families
Free parking
Operating hours

Question 4

*What is your current **overall assessment of retail trade in the city**? (please circle one)*

Table 22 | Overall Assessment of Retail Trade in the City

Overall Assessment	*n*	*%*
Positive with no room for improvement	0	0
Positive with room for some improvement	3	33.33
Neutral	2	22.22
Negative with room for some improvement	4	44.44
Negative with room for major improvement	0	0
No response	0	0
Total	*9*	*100.00*

Question 5

*If you answered 'Negative with room for some improvement' OR 'Negative with room for major improvements' in the previous question, please list up to three **general improvements** that could be made to encourage people to shop in the city.*

Question 5 (1)
Increase quality of professionalism with retailers' workforce development matched to education pathways
Attract some anchor retailers
More inner city living on first and second floors - crucial
Better customer service
Question 5 (2)
Establish a value proposition for the CBD that resonates with target markets
Beautification of streetscapes
Move St John St bus stop
Smarter product ranges
Question 5 (3)
Develop and implement a 'night-time economy' approach to CBD activation

Improve perceptions of safety
Fill up empty shops somehow
Targeted advertising

Question 6

*Please list up to three improvements the **City of Launceston** specifically could make to improve the overall shopping experience in the city.*

Question 6 (1)
More green areas to do up as seating/resting places
Wayfinding
Examine Hobart's approvals for CBD businesses, because potential for Launceston to be less strict
Improve walkability
Remove the anti-social behaviour in the city
More lights at night in the winter (decorative and functional)
Educational evening - presentations on smarter ways to retail
Lower speed limits
Wayfinding
Question 6 (2)
Displays in empty shop fronts
Fix bus stop issues
Make the new 'city brand' a huge success and reward retailers and hospitality for supporting it
St John St bus stops and connectivity between Mall and Quadrant
Work with landlords to reduce rent to increase new business
Move St John St bus stop
Better promotion of free parking time zones
Trees
Accessibility for people with disability
Question 6 (3)
Incentives for landlords to be more flexible on rent so occupancy is maximised
Bigger multistorey carparks
Set ambitious targets to increase and make public and active transport better
Transit centre in Birchalls car park
Make our city more pedestrian friendly
More food outlets in the city
Get out and understand business
Promotion CBD/shop top living to increase the number of people and vibrancy

Question 7

*Please list up to three improvements **your organisation** specifically could make to improve the overall shopping experience in the city.*

Question 7 (1)
Regular events calendar throughout city
Destination marketing
Support a place-based approach to urban development
Encourage member businesses to be more positive and spread positive news
Less negativity towards our organisation would allow us to do more in the CBD
Work on presentation of stores
Demographic study - educate retail as to shopping habits of customers
Educate members on what holds them back
Providing support to businesses to improve business management skills
Question 7 (2)
Driving development of more green spaces and use of disused spaces
Educate retailers on how to improve customer experience
Advocate government support for urban development
Encourage sharing of knowledge and goodwill between retailers
Funding to secret shop city businesses to improve customer service and give them some much needed feedback
Greater funding
Support to improve digital marketing
Question 7 (3)
More retail sales days like 'Crazy Day'
Help with the UNESCO Creative Cities proposal
Work to ensure high standards of service across the CBD
Support to understand market need and demand

Question 8

*In your opinion, over the last three years **customer visitation to the CBD** has (please circle one).*

Table 23 | Customer Visitation to the City

Customer Visitation	*n*	*%*
Significantly Increased	0	0
Increased	1	11.11
Stayed the same	5	55.55
Decreased	3	33.33
Significantly decreased	0	0
No response	0	0
Total	*9*	*100.00*

Question 9

Do you have any other comments you would like to make regarding shopping in the city in Launceston?

Question 9 Responses
We have fabulous independent retailers who should work together to help promote Launceston as a 'boutique' and unique shopping experience.
Need to invest in educating businesses with the skills to succeed in the new retail environment and be competitive with online.
Make sure millennials have input into shaping CBD revitalisation.
Make sure the inner-city living project is a huge success.
Aim for quality and authenticity.
We should avoid creating unrealistic expectations for how much difference Council and agencies can make to reverse the decline of retail in Launceston.
We are very lucky to live in a town that is people friendly and continuing to make improvements. The cost of parking is not an issue and people should move on from this.
There are competing interests, and a reliance on pundits instead of experts. Council seem to do strategies in silos instead of broader research.
The city or CBD is much more than shopping. Opportunities and availability of services and accommodation contribute to the environment with flow on impacts for retailers. The broader role and functions of a CBD and how these different functions connect and interact are important to understand.

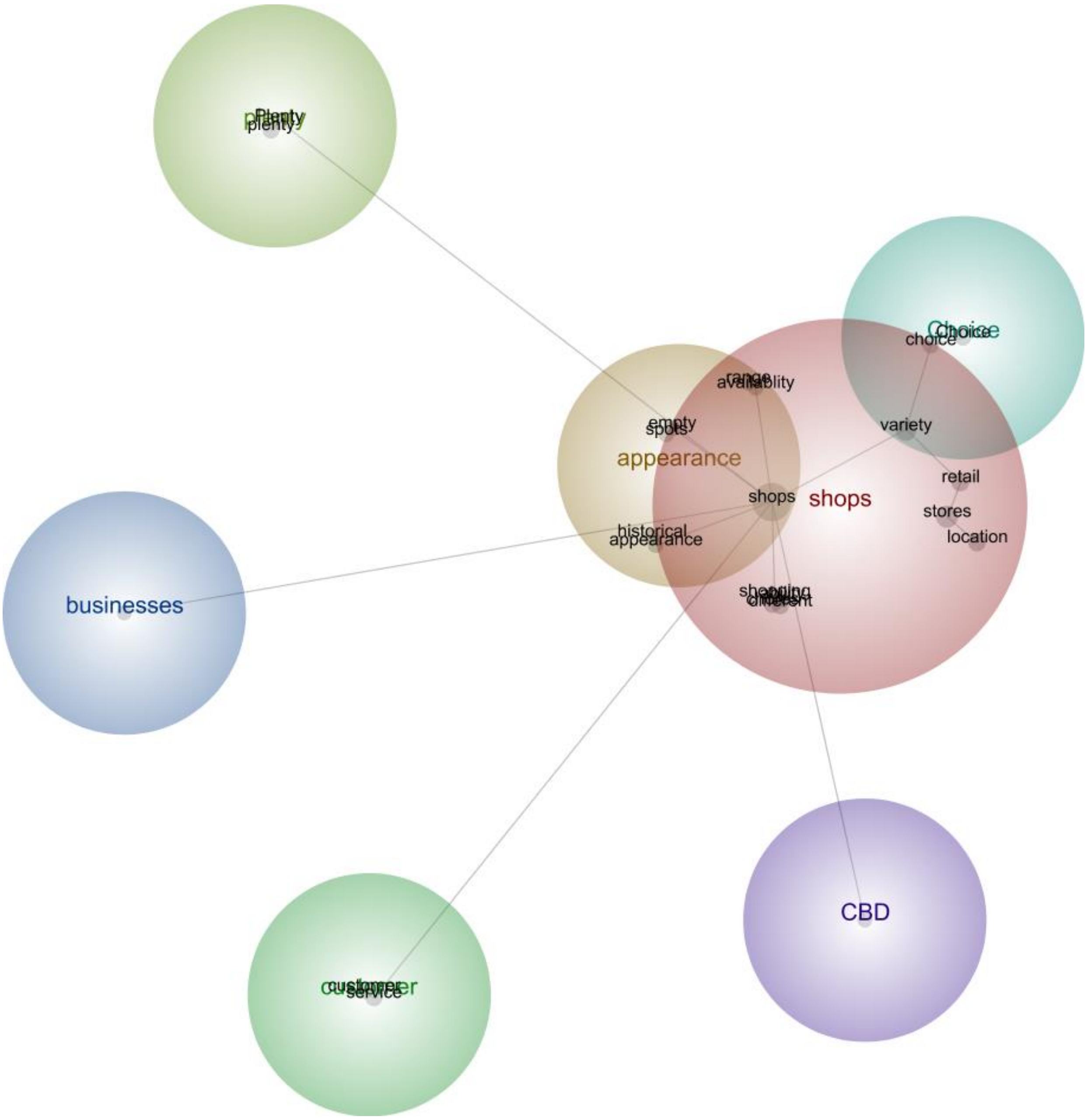
Group 4 | Employee Stakeholders from the City of Launceston

Question 1

What are the top five factors that you consider ***encourage*** *people to shop in the Launceston CBD (please list in order of importance, with 1 being the most important).*

The following figure provides the concept maps showing which factors employee stakeholders from the City of Launceston think encourage people to shop in the Launceston CBD.

Figure 20 | Factors that Encourage Shopping in the City



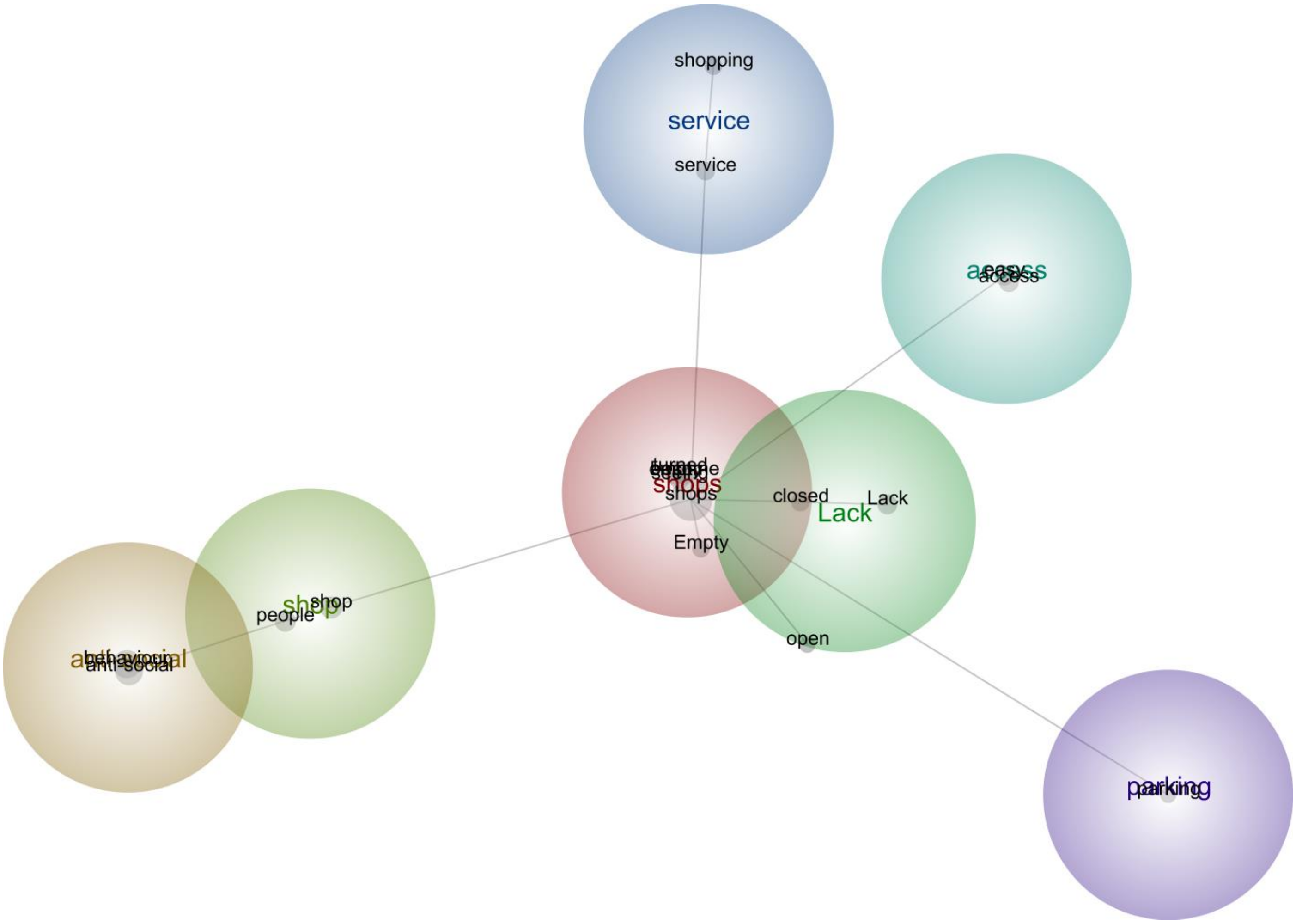
The smaller sample for this group of respondents results in a smaller number of themes and concepts (for this and subsequent questions). That said, similar to other groups, the 'hottest' theme for this group is **shops**, including the concepts of range, variety, **choice** (also the name of an overlapping theme), availability, ability, different (shops) and location. Again, it appears that some of the respondents may have interpreted this question as what *would* encourage people to shop in the city versus what *currently did*. Supporting **local** businesses was a linked theme, as was the **CBD** (having pleasant surroundings), **plenty** (of parking, shops, food outlets), and good/great **customer** (service). Parking did not appear as its own theme.

Question 2

*What are the top five factors that you consider **hinder** people from shopping in the Launceston CBD (please list in order of importance, with 1 being the most important).*

The following figure provides the concept map showing which factors employee stakeholders from the City of Launceston think discourage people shopping in the city.

Figure 21 | Factors that Discourage Shopping in the City



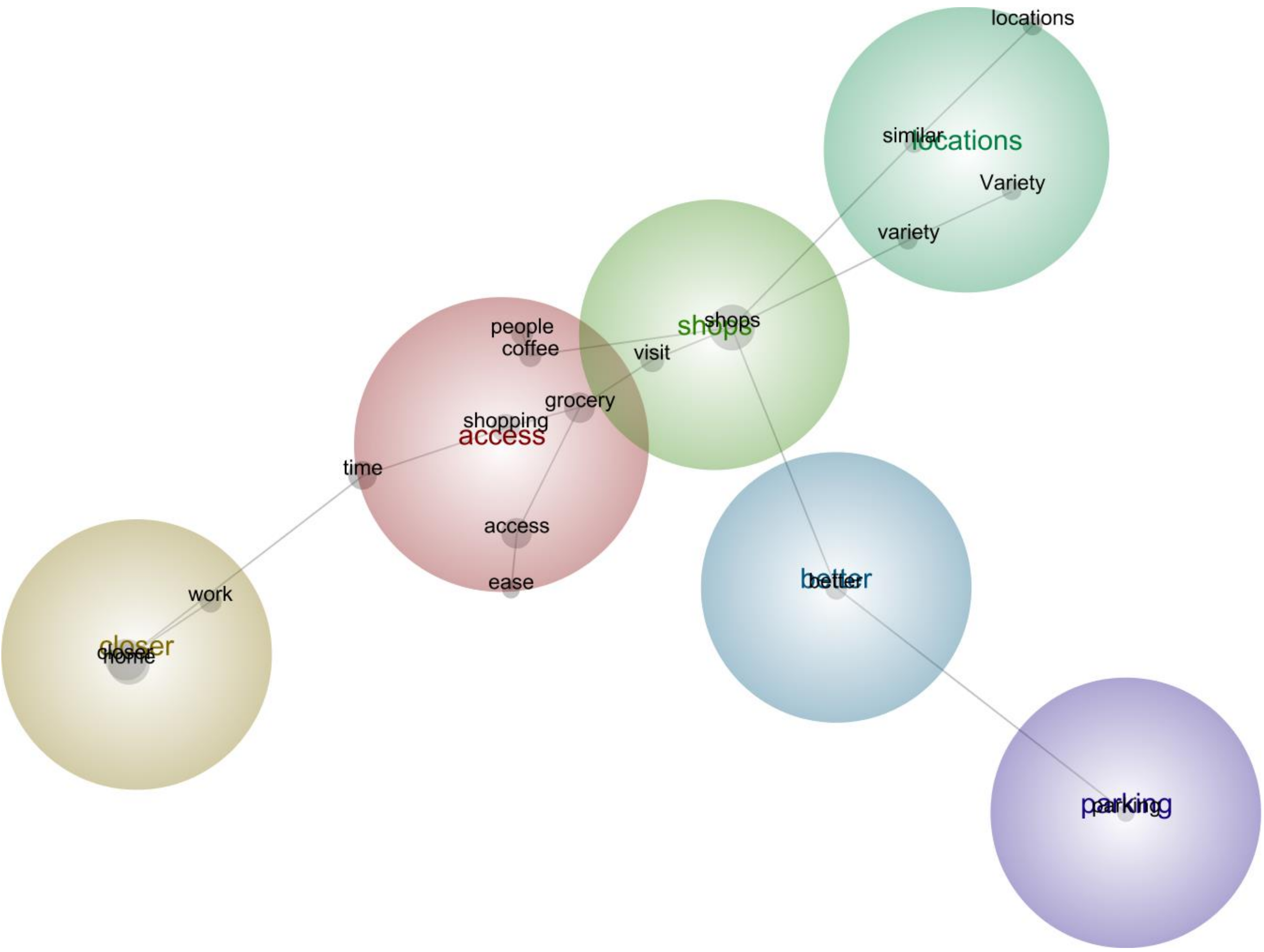
The 'hottest' theme here was **shops**, overlapping with the theme **lack**, and related to concepts of empty/closed (shops), low variety, lack of quality shops, and being turned (off). **Anti-social** (behaviour) includes concerns over the presence of people smoking near shop doors (its own theme), and the general environment of the **shop(**s). **Parking** includes concerns over cost, unavailability, and time limits. Similar issues were picked up in the theme **access**, which also referred to traffic flow and there being easier access to suburban shops. Concern over poor customer **service** also is a theme. Poor walkability, and no 'buzz' especially in winter, are also mentioned.

Question 3

Thinking about the reasons why shoppers may choose to shop in other shopping locations (e.g. Mowbray, Kings Meadows, Newstead, etc.), what are the top five factors that you consider ***<u>encourage people to shop in other locations?</u>***

The following figure provides the concept map showing which factors employee stakeholders from the City of Launceston think encourage people to shop in other shopping locations (suburbs).

Figure 22 | Factors that Encourage Shopping in Other Locations



The hottest theme in this figure centres around **access**, and relates to the point mentioned above about easier access to shopping (including for groceries), (having) coffee, (having more) time (due to ease). **Closer** is the next theme and relates to proximity to home and work and again accessibility and time. **Shops** is next and involves both time (to 'pop in' to shops), as well as different shops (including supermarkets). **Parking** appears next with the familiar comments of no-cost, closer to shops, and availability and ease. The theme of **locations** refers to specific shopping precincts as well as specific shop locations (e.g. Coles), and the theme of **better** refers to better parking, and access to shops.

Question 4

What is your current ***overall assessment of retail trade in the city****? (please circle one)*

Table 24 | Overall Assessment of Retail Trade in the City

Overall Assessment	*n*	*%*
Positive with no room for improvement	4	16.66
Positive with room for some improvement	3	12.5
Neutral	6	25
Negative with room for some improvement	11	45.83
Negative with room for major improvement	0	0
No response	0	0
Total	*24*	*100.00*

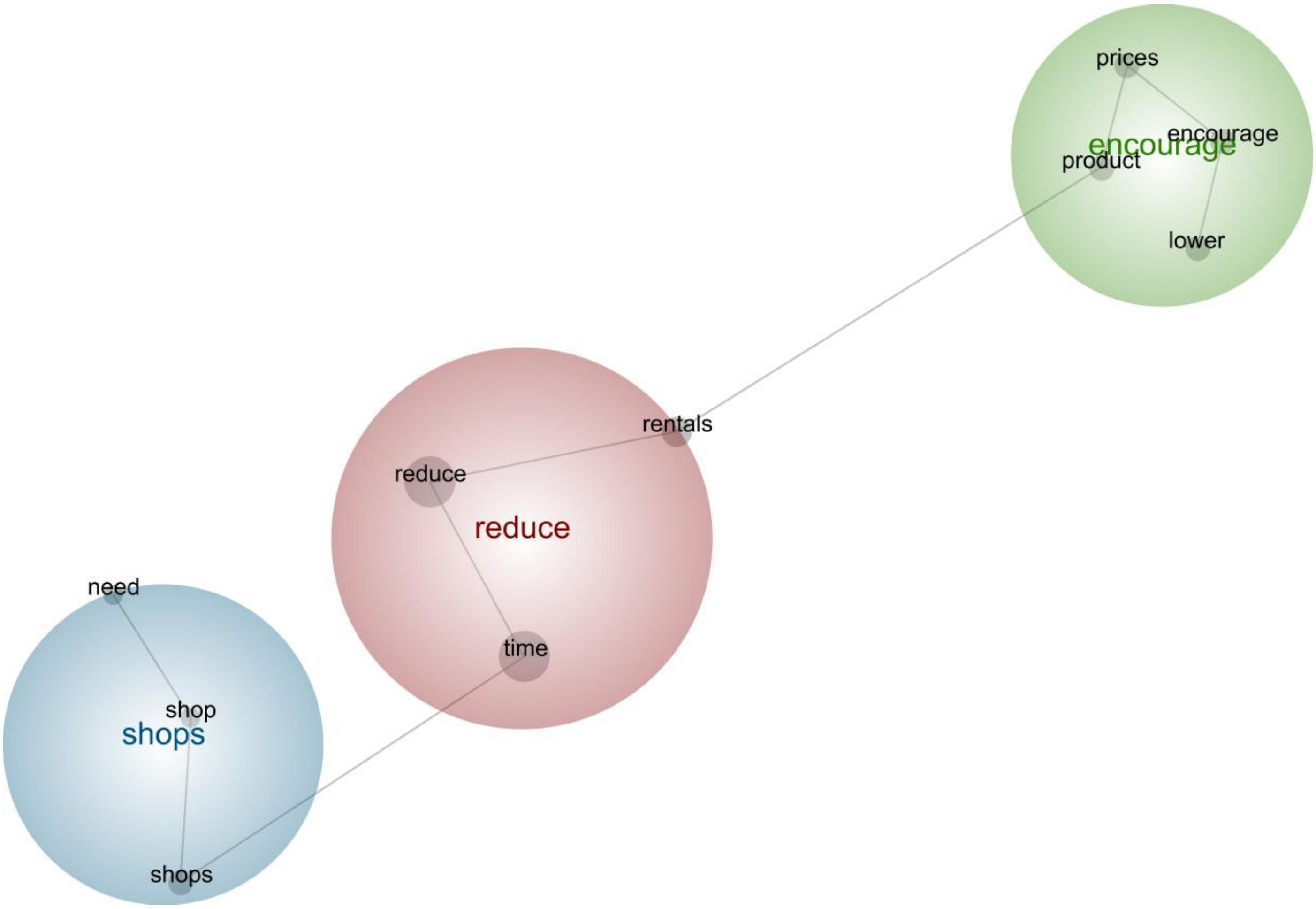
The above table indicates that just under one-third (28.71%) of City of Launceston employee stakeholders have a positive overall assessment of retail trade in the city, a quarter (25%) are neutral, and just under a half (45.83%) have a negative overall assessment.

Question 5

*If you answered 'Negative with room for some improvement' OR 'Negative with room for major improvements' in the previous question, please list up to three **general improvements** that could be made to encourage people to shop in the city.*

The following figure provides the concept map showing which factors employee stakeholders from the City of Launceston who have a negative overall assessment of retail trade in the city think are general improvements that could be made.

Figure 23 | General Improvements to Encourage Shopping in the City



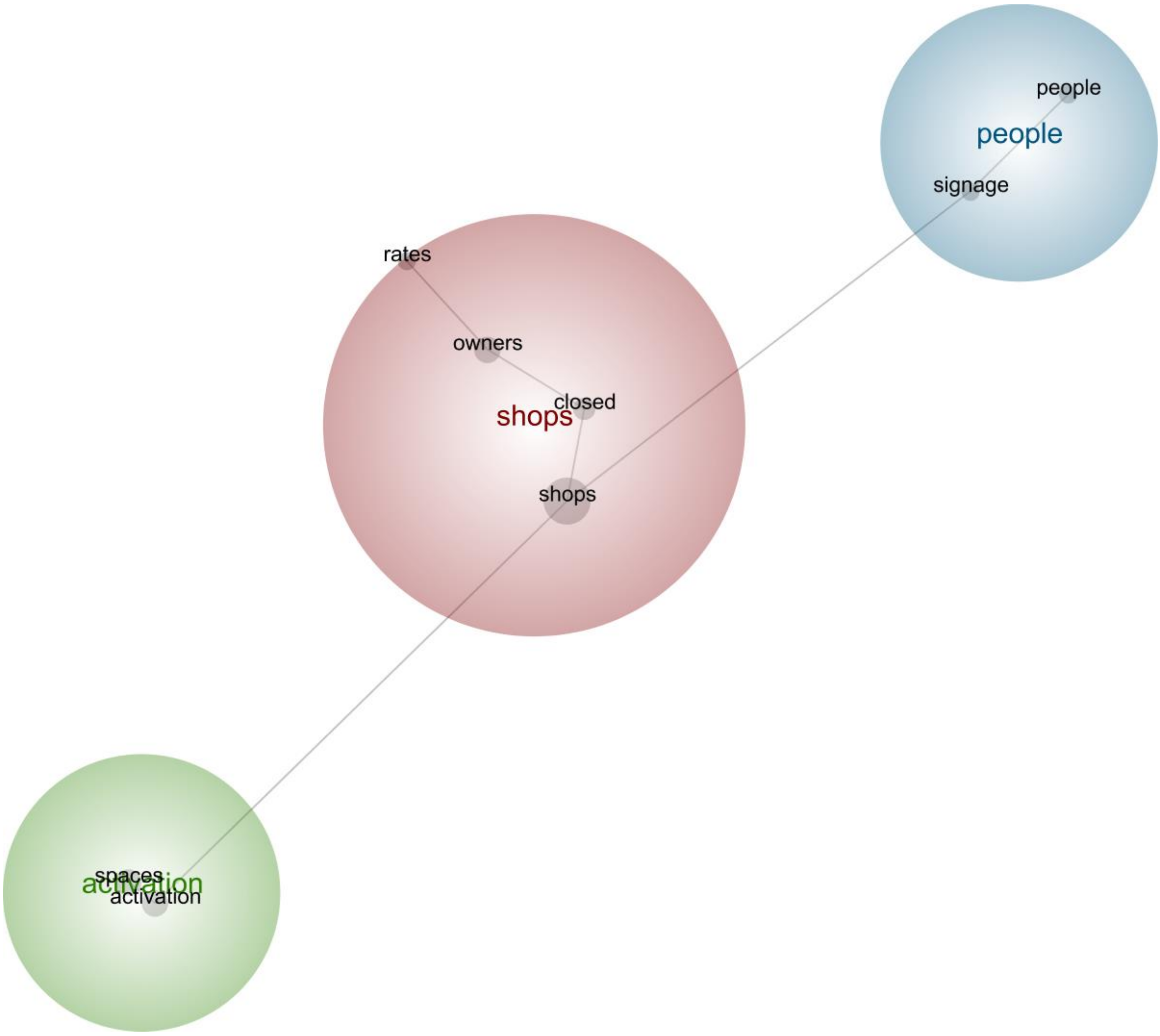
The 'hottest' theme in the above figure is **reduce**, which refers to the concept of reducing rent (to perhaps lead to reduced prices), especially for shops which have been tenanted for a long time. **Shops** and **encourage** follow next and cover similar ground about the need (to reduce rents) and encouraging more shops (by lower prices and improved products and range).

Question 6

Please list up to three improvements the ***City of Launceston*** *specifically could make to improve the overall shopping experience in the city.*

The following figure provides the concept map showing which factors employee stakeholders from the City of Launceston think are improvements that could be specifically made by the City of Launceston.

Figure 24 | Specific Improvements by the City of Launceston to Encourage Shopping in the City



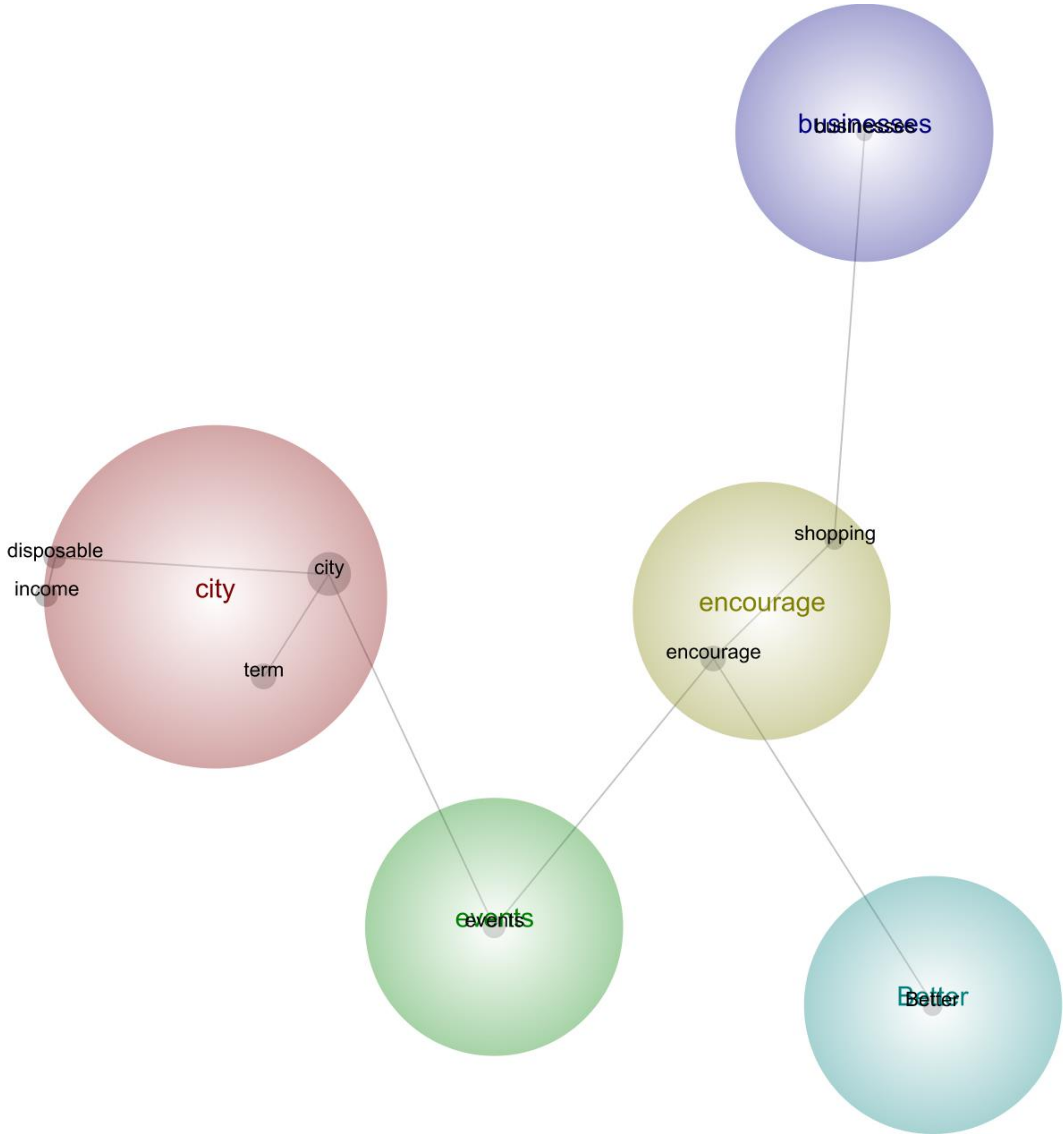
The 'hottest' theme here is **shops**, in contrast to other respondent groups for which the city or CBD were 'hottest'. The related concepts concerned working with owners to (re-open) closed shops, and (lowering) rates. The subsequent themes of **people** and **activation** involved (improving 'way-finding') signage to direct people to shops and activating (empty) spaces (e.g. with pop up art displays and displaying goods until a new tenant moves in). Positive comment was made about improvements to Civic Square.

Question 7

Please list up to three improvements ***<u>other business organisations</u>*** *(e.g. Launceston Chamber of Commerce, Cityprom, State Government, etc.) specifically could make to improve the overall shopping experience in the city.*

The following figure provides the concept map showing which factors employee stakeholders from the City of Launceston think are improvements that could be made by other business organisations.

Figure 25 | Improvements Made by Other Business Organisations to Encourage Shopping in the City



The ‘hottest’ theme in the figure above is **city**, encompassing concepts of (improving the look of) the city, and (cleaning up access to) the city by reducing trucks (the disposable income concepts did not seem completely relevant here and concerned comments surrounding people having more in order to spend). This theme linked with that of **events** with stakeholder organisations being urged to hold more. The **encourage** theme covered a range of comments (encourage pop-ups, encourage more inviting shop fronts, encourage longer business hours), and is linked to the remaining themes of **better** (lighting, signage, marketing) and **businesses** (more variety, and helping save certain businesses from closure).

Question 8

*In your opinion, over the last three years **customer visitation to the CBD** has (please circle one).*

Table 25 | Customer Visitation to the City

Customer Visitation	*n*	*%*
Significantly Increased	2	8.33
Increased	6	25
Stayed the same	4	16.66
Decreased	7	29.16
Significantly decreased	4	16.66
No response	1	4.16
Total	*24*	*100.00*

The above table indicates that under a half (45.82%) of City of Launceston employee stakeholders think that customer visitation to the city has decreased over the past three years, over an eighth are neutral (16.66%), and one-third (33.33%) report that customer visitation has increased.

Question 9

Do you have any other comments you would like to make regarding shopping in the city in Launceston?

There were not enough responses to this question for concepts maps to be meaningfully extracted, so responses are provided in full.

Question 9 Responses
From observation traffic has increased around the city causing much greater congestion and limiting the ease of access to the city centre.
Get with the times.
CBD needs to focus on service shops. Retail will not be able to compete with the suburbs and online shopping.

Launceston jammed shut in old way of “must get to shop in private car”, must get out this outdated way of travel.
Retail will always struggle due to online shopping (with far less overheads). High rents are forcing businesses to ask high prices discouraging visitation to the CBD.
Businesses need to make the people come in with the product/variety.
Not up to the same standard as other Australian cities.
I believe that shopping in general (not just CBD) has decreased due to the high cost of living (and increasing) and wages do not keep up comparatively, i.e. everything has gone up faster than wages. CPI is not a reliable indicator as it does not take into account power, rents, water etc.
I think online shopping has had a massive impact on all areas and local businesses. I don't see a solution being provided by the organisations listed in question 7 or CoL anytime soon, unless the shop owners themselves can compete with the online presence.
When I want to shop in town it usually for something specific. If I cannot find a park on the street I will usually keep driving and go home, rather than pay a minimum car park fee (I really like Hobart's model of first hour free)
City Heart Project enhancements of Civic Square have been done well and space is activated. However, Brisbane Street Mall appears bare, uninviting and lacking.
Aim for quality and authenticity.

Discussion and Implications

This section provides a discussion of the results of the study.

Drivers for City Shopping
It is apparent that respondents from all groups perceive the variety and type of shops to be the main driver for encouraging shopping in the city. This can be seen over a number of the Concept Maps with words such as *variety*, *unique*, *boutique*, *range*, *options* and *outlets*. Service is also considered important, in terms of staff being *friendly*, *customer-oriented* and *pleasant*. Accessibility, food and coffee outlets also draw people into the city. It also seems that a lot of consumers are interested in an *experience* in the city and are not just concerned with retail and shopping. There were frequent mentions of *art* installations, *atmosphere*, music and the general *social* milieu that would be facilitated. There was also much comment about the Brisbane Street Mall which was touched on across a number of the questions.

It must be pointed out that some of the respondents across the groups seemed to have interpreted this question as what *would* encourage people to shop in the city versus what *currently did*. In this regard, it may be best to look at the responses to this question as more of an exhortation to action than a description of the current state.

Barriers to City Shopping
The most cited barrier to shopping in the city was parking, specifically the price of parking, the time limits and the lack of accessible parking spaces. Some also commented on the lack of credit card facilities available for paying for parking. The data also shows a number of respondents were very critical of Care Parks, particularly with regard to price.

Given this research used a self-report opinion-based methodology, this does not constitute evidence that changing parking conditions will actually increase visitation (or sustainable visitation). However, it does indicate what is on the minds of many respondents.

The City of Launceston is preparing a parking strategy for Launceston city centre which is outside the scope of this report.

Research from the United Kingdom considers the issue of parking in city centres. The focus in the United Kingdom (and in other countries) is on minimising car volume in city centres whilst still balancing the need for accessibility.

> *Providing a bespoke parking offer is less about volume of spaces and more about a range of users and uses to encourage and support flexible economic activity. When planning parking provision, it is important to develop strategies specific to individual town centres that aim to strike the optimum balance between making a town accessible and avoiding harm to its environmental attractiveness. Car parking needs to be planned carefully to avoid excessive provision of spaces, which can encourage unnecessary car use. However, it is important that sufficient space is provided to prevent inappropriate parking, which might be detrimental to the safety, amenity*

and function of a place. A flexible approach, tailored to the particular needs of a town, can help to achieve the best balance.[65]

There is a dearth of academic research on the relationship between car parking and retailing and it is therefore difficult to draw on previous studies to make recommendations about reducing the cost of parking and the impact this would have on the retail sector. However, parking alone is unlikely to be the solution to the challenges that the retail industry is facing across the country and in Launceston.

Concerns were also expressed across each group of respondents about the city atmosphere, particularly in the Brisbane Street Mall. While this encompassed issues such as facilities and amenities, family-friendly spaces, seating, greening and beautification (or the lack thereof), the most commonly mentioned barrier here was anti-social behaviour (including fighting). This was said to lead to an unpleasant atmosphere which contributed to some respondents saying they did not want to linger in the Mall.

Factors related to atmosphere also included the lack of cover in poor weather (especially in winter) and vacant shops. The vacancy created by Birchalls closing was a very common lament. Related as well were concerns about traffic congestion, about buses travelling through the city and about the location of bus-stops, in particular the bus stop on St John Street. This particular bus stop was considered as a place where anti-social behaviour was prevalent.

Shopping in Other Locations Outside the CBD

The data showed three main drivers for encouraging shoppers to shop at suburban shopping locations – free and plentiful parking, the availability of a supermarket and an undercover shopping experience. In addition, the words 'convenience' and 'close to home' were frequently cited, as well as access/accessibility. Similarly, respondents mentioned shopping locally was often quicker for time-poor shoppers. There were also respondents who expressed a desire to support shops in their local area and having/contributing to a sense of community.

Respondents also mentioned the range and variety of shops in suburban shopping centres, despite this also being mentioned as something that would encourage shoppers to shop in the city. This is also related to the point mentioned above regarding the availability of supermarkets in these locations.

A number of participants cited a lack of traffic congestion as an important factor in encouraging visitation to suburban shopping locations. This was related to the general issue of atmosphere which was, in general, commented on positively. Several respondents, in this regard, mentioned the absence of anti-social behaviour in these locations.

Suburban shopping centres clearly provide for consumers engaged in 'convenience' shopping. As there is a general trend around low population growth and subsequent

[65] Scotland's Towns Partnership. 2015. *Town Centre Toolkit*. The Scottish Government. https://s3-eu-west-1.amazonaws.com/stpfiles/resources/Town-Centre-Action-Plan-Masterplanning-Toolkit.pdf

population aging, these types of centres will continue to appeal to a particular shopper 'cohort'. It is important therefore that the city centre strengthen its position as a 'speciality' shopping experience as different from the 'convenience' proposition offered by suburban shopping centres. The positioning of the city should highlight the benefits of speciality stores, arcades, cafes and restaurants, places to meet and spend time, and a unique shopping 'experience' that can't be found in other shopping locations.

Current Assessment of Retail Trade and Customer Visitation in the City

Higher numbers of retail and service businesses reported negative assessment of trade in the city than did the other three respondent groups. There was 62% of this group who responded, 'negative with room for some improvement' or 'negative with room for major improvement', in comparison with 50% of shopper respondents, 44% of key stakeholder respondents and 45% of City of Launceston stakeholder respondents.

Retail and service businesses were asked about the level of customer visitation to their individual businesses and whilst 39% reported visitation over the past three years had 'significantly decreased' or 'decreased', 20% reported it had 'stayed the same' and 33% reported it had either 'increased' or 'significantly increased' (6% did not respond). Businesses reporting an increase were from the ANZSIC code 'recreational goods', with 'specialised food retailing' reporting that on average visitation was stable. These ANZSIC coded businesses had been operating for an average of 20.5 and 33.75 years respectively.

Customers and the two stakeholder groups were asked their opinion of customer visitation levels to the city over the past three years. There were 63% of customers who believed visitation has 'decreased' or 'significantly decreased'. The majority of key stakeholders on the other hand reported visitation had either 'stayed the same' or 'increased' (66%) with about one third (33%) reporting 'decreased'. Stakeholders from City of Launceston were more evenly split with 33% reporting 'significantly increased' or 'increased' and 45% reporting 'decreased' or 'significantly decreased'. There were 16% who reported 'stayed the same' and 4% did not respond.

There are clear differences in the perceptions of customer visitation to the city between customers and stakeholders. In particular, the Key Stakeholder group reported a more positive outlook on levels of visitation.

General Improvements to the City

Those respondents who reported that their overall assessment of retail trade in the city was either 'negative with room for some improvement' or 'negative with room for major improvement' were asked what general improvements could be made to encourage people to shop in the city.

Consistent with being the most cited barrier to shopping in the city, parking was top of the list of suggested improvements. 'Parking' covers a range of issues, from the cost (making it free, or free for the first one or two hours, or free on the city perimeter), to more off-street parking, to family-friendly parking. Some comment was made that indicated the issue for the city was not so much the shops, but the logistics of getting in and out. The issue of logistics also speaks to how public transport is managed, with comment around reducing the number of buses in the centre of the city and moving bus stops.

Noting the above, the next two improvements centred around the themes of 'shops' and the 'city', with much commonality. In general terms, respondents asked for a better shopping experience, which included a wider range of products, variety in shops, longer store opening hours, more eateries/cafés (for example in Quadrant Mall), general improvements to the mall (including considerations for dealing with the weather, beautification and seating), and improvements to amenities and facilities (such as toilets and parent facilities). Empty shops, including the Birchalls space, were frequently mentioned.

An increased police presence was noted by the retail and service business group in particular, as a way of dealing with anti-social behaviour, or at least the perception of this behaviour. A tangible police presence was also suggested in the form of a kiosk.

It should be noted in terms of these general improvements, that they include factors that may or may not be the City of Launceston's responsibility. Indeed, there seems to be a wide-spread misconception that the Council is responsible for the presentation or 'look' of vacant shops, and little understanding that individual landlords have responsibility not only for leasing out their properties but also for tending to the properties whilst they are empty.

Specific Improvements to the City by the City of Launceston

Following from the previous point, respondents were all asked what improvements the City of Launceston could make to improve the overall shopping experience. As above, parking was reported on across the groups with the same manner of recommendations. Again, there were suggestions that are perhaps outside of the Council's control, such as reducing rents for shop tenancies, dealing with empty shops and renovating buildings, and increasing the variety of shops.

As mentioned in the section on drivers, there was a lot of comment about improving the experience of being in the city; as well as shopping, people are interested in have a pleasant and positive time when they come into the city. This encompasses a range of suggestions: more music, buskers and events; advertised street theatre/art/entertainment; beautification and greening; considering ways the mall can be weather-proofed; improved public toilets; improved seating and removing trip hazards in the mall.

The fact there are no eateries or coffee shops (apart from one relatively small coffee vendor) in the Mall is a distinct disadvantage for both traders and customers using the Mall.

There were comments made about the location of the information centre with suggestions that it have a more central and therefore visible location. The Brisbane Street Mall was suggested as a better location for this service. The Hobart City Council has recently upgraded the old information/police booth in the Elizabeth Street Mall to a new

‘Information Hub’ which is staffed by the Tasmanian Travel and Information Centre and provides specialist tourism services to customers. The hub also provides other services including National Parks passes, Metro cards and travel gift vouchers; Spirit of Tasmania fares; multiple travel and accommodation bookings throughout Tasmania and a range of maps and brochures for visitors to Hobart. The opening times are 10am to 4.30pm Monday to Saturday. The Hub is very easy to find being located in the Elizabeth Street Mall and retail and service businesses are encouraged to direct their in-store customers to the Information Hub to answer questions.

There were positive comments made about Civic Square as having a great deal of potential as a ‘town square’ and about the Harvest Market. Further suggestions centred around increasing the accommodation options within the city to increase the number of people physically located within the precinct.

Improvements to the City by Key Stakeholder Organisations

Key Stakeholder groups were asked what improvements the Key Stakeholder organisations (apart from the City of Launceston) could make to improve the overall shopping experience in the city.

Comments included introducing a calendar of regular events (Cityprom are already active in this space), using destination marketing to attract visitation, encouraging pop-up stores, and increasing opportunities for advocacy.

There were also comments about assisting retail businesses in terms of store presentation, keeping up to date with consumer shopping trends, improving the customer experience, marketing and general business skills.

In order to position the city centre as a ‘specialty’ shopping experience, Cityprom could consider introducing a comprehensive and ongoing marketing campaign using traditional, digital and social media and using a slogan such as ‘Love Launceston: Love Shopping in the City’ and additional variations on the theme such as ‘Love Launceston: Love Meeting Up in the City’, and ‘Love Launceston: Love Dining in the City’ etc. In addition to a TVC, radio ad, social media tools etc., the campaign should also utilise the fabric banners throughout the CBD, door welcome stickers for every store and other materials (e.g. printed cloth shopping bags etc.). This campaign should very clearly and simply promote the benefits of shopping in the city that cannot be found in the suburbs, namely a wide variety of specialty stores, interesting laneways and arcades, friendly customer service, places to meet up and great food and coffee. It would also draw on the ‘experience’ aspect of visiting the city by highlighting other activities and experiences, in addition to shopping, that are only available in the city.

In terms of improving advocacy, Cityprom and Launceston Chamber of Commerce should continue to try and work cooperatively in implementing a regular calendar of educational events for retailers and service businesses (with a primary focus on new skills development in addition to simply networking).

Retail education and training would be beneficial for many city traders. In particular, it is apparent that there are a number of retailers who do not know how to respond to the current economic climate and are not adjusting to retailing trends, and not using e-commerce/offering online shopping. This means they are not able to leverage the benefits of multi-channel retailing, offer a click and collect service or create an effective online presence to actually attract customers into their physical store. Online and in-store retailing now need to go 'hand in hand' – those retailers that do not recognise the changes and embrace the opportunities available through online retailing as an additional channel will find it increasingly difficult to compete.

Retail and Service Businesses

This group of respondents were asked to indicate whether or not their business had a website, with three quarters (75%) reporting that the business did have a web presence. Digital literacy and marketing remain a significant challenge for small and independent retailers and this was reflected in the rate of respondents who indicated the business did not have a website (22%).

The ability for consumers to shop online (as well as in-store) with retailers is facilitated through the provision of e-commerce (i.e. online shopping cart) and of those businesses reporting a website, over one third (36%) reported they did not offer an e-commerce option as part of their online offering. This is a concerning finding and is indicative of retailers perhaps not be aware or not responding to the changes in the ways that consumers are now shopping.

The data indicates almost half of respondents who had indicated they had a website with e-commerce (i.e., 42%) did not offer a click and collect option. Internationally and nationally, retailers are adopting a click and collect strategy. This 'buy online, pay in-store or 'BOPIS' approach has a number of benefits for consumers and retailers. Most notably research has shown that around 50% of customers who bought items online were likely to make an additional purchase when going in-store to collect.[66] [67] [68] [69]

Interest-free payment options are increasingly being shown to impact on shopper behaviour. around half of respondents (48%) offered this option. The most common were

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[66] Mortimer, G. and Grimmer, L. 2017. Why retailers want you to 'click and collect'', *The Conversation*, 30 August. https://theconversation.com/why-retailers-want-you-to-click-and-collect-83094

[67] Grimmer, L. 2019. 'Talking Point: Plea to Tassie shops: Unless you click, you can't collect', *The Mercury*, 15 March. https://www.themercury.com.au/news/opinion/talking-point-plea-to-tassie-shops-unless-you-click-you-cant-collect/news-story/014ccf7f2ddc015fe0691e919dfbe808

[68] Grimmer, L. 2019. 'Do you click and collect your online shopping?': Interview with Louise Saunders, Evenings with Louise Saunders, ABC Radio Hobart, 11 April. https://www.abc.net.au/radio/hobart/programs/evenings/lgrimmer/10994112

[69] Mitchelson, A. 2018. 'Will click and collect be the secret weapon for bricks-and-mortar retailers?', Smart Company, 6 September. https://www.smartcompany.com.au/industries/retail/will-click-and-collect-be-the-secret-weapon-for-bricks-and-mortar-retailers/

Afterpay and Zippay. Afterpay is the clear leader among BNPL (buy now pay later) providers, with more than 4.2 million users compared with 1.3 million for Zip and Humm.[70] Some businesses also reported offering 'traditional' lay-by terms and store credit or store accounts that were interest free. Again, of concern, the data shows 51% of respondents did not offer any form of interest-free payment.

In terms of social media use, only 7% of respondents reported that they didn't use social media. 87% reported using Facebook and 62% reported using Instagram.

Improvements to Individual Retail and Service Businesses
Retail and service business owner/managers were asked to list up to three improvements they would like to make to their business. Almost one quarter (23%) did not respond to this question.

Business owners predominantly responded with plans to 'increase' sales, turnover, foot traffic, profitability or customers. A number reported plans to improve signage or security (cameras) and plans to paint the outside or inside of their stores or to upgrade fixtures and fittings.

A number of businesses mentioned improvements that are beyond their imprimatur such as reducing parking fees, changing parking conditions near their shops, reducing rates, combatting anti-social behaviour and reducing smoking.

The majority of participant feedback highlights a lack of understanding by many business owners/managers of the changes that are taking place in terms of shifting consumer shopping habits and consumer preference for in multi-channel and online retailing.

The feedback also suggests that there are many retailers who do not fully understand or are not responding to current economic conditions. The majority of the responses to this question were outcome-focussed (e.g. 'increase foot traffic' or 'increase profits') rather than input-focussed (i.e. measures to achieve a particular output).

That said, there are a number of retailers that are working really well in offering both a physical and an online shopping experience, e.g. Yeltour, Hope and Me and Acreage to name just a few.

It is interesting to note that those businesses who were least satisfied with their own performance were more likely to have a negative overall assessment of retail trade in the city. Whilst some businesses did report increasing social media presence or implementing a website, there was no mention of 'upskilling', gaining or improving knowledge, skills and experience in the fields of marketing, e-commerce, merchandising (including visual merchandising), or general small business or retail/service skills. A very small number of businesses mentioned plans to conduct staff training and or improve customer service.

[70] https://www.smartcompany.com.au/industries/retail/afterpay-humm-retail/

Recommendations

As a result of the data collected from this research study, the following recommendations are suggested for consideration by the City of Launceston, retail and service business owners, and representatives from key stakeholder groups.

Overall Recommendation

Key stakeholder organisations to develop an integrated city marketing campaign to position the city as a speciality shopping destination as well as offering a range of experiences for visitors. The campaign should strongly promote the unique nature of the city, its stores, arcades, eateries and services and bring city businesses together in a collaborative and positive manner.

Recommendations for Retail and Service Businesses

- City traders to develop an understanding of the role of retailing in the city and the positioning of the CBD in offering a specialty shopping experience not to be found in other locations outside the city centre.
- In recognising how consumer shopping behaviour is changing, city traders without an online and/or e-commerce presence should work towards gaining these capabilities.
- City traders to develop their own individual 'differentiation' strategy to ensure that their product/services offerings are unique and/or not available from other stores, particularly those outside the city.
- City traders to ensure high quality customer service is a priority for their business, recognising the importance of customer loyalty for encouraging repeat business and positive word of mouth.
- City traders to recognise the power of positive word of mouth and to leverage the power of electronic word of mouth via their own social media accounts.
- City traders to work collaboratively with other complementary businesses in the city to leverage the power of collaborative marketing and draw visitation to an entire precinct rather than just individual stores.

Recommendations for Key Stakeholders from the Launceston Business Community

- Cityprom and the Launceston Chamber to formally discuss the findings of this report with the retail and service sector in the CBD.
- Launceston Chamber and Cityprom to host skills development workshops for retailers highlighting the changes in the retail sector and changes in consumer shopping behaviour, retail trends and opportunities presented by multi-channel retailing (in-store, online, mobile, app), collaborative marketing and contemporary retail strategy.

- Cityprom to reconsider a re-brand – a refreshed website and social media presence – and the development of a shopping/city information app and paper guide (e.g., for local accommodation providers).
- Launceston Chamber and Cityprom to work cooperatively by identifying their common goals for the city and their members. A joint approach to city marketing and business issues from both organisations will strengthen any efforts made to improve the business environment for city traders.

Recommendations for the City of Launceston

These recommendations include only suggestions which the City of Launceston has the ability to actually affect. There are clearly a number of misconceptions amongst city traders and the broader community (as evidenced through the feedback elicited from this study) about the role and responsibility of Council.

- Consider a city-wide strategic approach to dealing with the visual aspect of empty shops which could include a public register of landlords who own empty shops and putting the onus on building owners to improve the appearance of empty stores.
- Consider working with real estate agents and landlords to encourage short-term retail leases for empty stores to encourage pop-up stores, the trial of new retail offerings or for short-term non-retail use.
- Consider developing a policy that sets out specific types of businesses that can lease premises in specific areas in the city (e.g., Quadrant Mall) to ensure that the retail mix in particular areas within the CBD encourage footfall and vibrancy.
- Consider developing a policy that allows for multi-use of some retail tenancies (e.g., a shop during the day, café/bar at night) and allows for complementary businesses to rent a single premise.
- Consider making specific improvements to the Brisbane Street Mall including increasing food options (e.g. food vans), increasing existing seating options (including tables with chairs and single seating options), moving the information booth to the Mall, and in the longer-term installing an all-weather canopy.
- Consider providing a permanent council-run pop-up space (this could be a booth-type structure in the Mall, perhaps as part of the Information Booth) for short-term lease by new or existing businesses to showcase new retail product or brand offerings and drive footfall to city centre and the Mall specifically.

This report notes the City of Launceston is ready working with relevant authorities and stakeholders in addressing the following factors which were included in feedback from respondents in this study:

- Consider the merits of various parking options.
- Liaise with Tasmania Police to discuss possibilities for increasing visible police presence in the CBD, particularly in the Brisbane Street Mall and St John Street to reduce instances/perceptions of anti-social behaviour.

- Liaise with Metro Tasmania about the possibility of moving the bus stop in St John Street.
- Increase the food/coffee presence in Brisbane Street Mall and Quadrant Mall (e.g. food trucks or pop-up cafes in the short-term).
- Liaise with the owner of the old Birchall's site and provide support to attract an appropriate tenant (i.e. independent grocer, major supermarket chain [smaller format store], major fast food chain or mini food court).
- Introduce more trees and greenery in the Brisbane Street Mall and more broadly in the CBD.
- Consider the improvement of toilets and parent facilities, in particular improved/increased signage.
- Using a similar approach taken by the City of Launceston for the Quadrant Mall, investigate the reasons for high and ongoing vacant retail tenancies with real estate firms for the following locations: Tattlers Arcade, Elizabeth Street, Centreway Arcade and part of George Street.
- Continue support for increasing the amount of city living, particularly through supporting the conversion of 'shop-tops' into residential accommodation.

Closing Remarks

In response to perceptions amongst city traders and the broader Launceston community that retailing in the city centre is suffering, the City of Launceston commissioned this study to determine the views of a range of relevant stakeholders including city traders, shoppers, and key stakeholders. Respondents were asked to provide their opinions on factors that encourage, as well as discourage, shopping in the CBD.

Significant support for the findings of the study can be derived from the fact that the sample frame for the retail and service businesses in the CBD (Group 1) was essentially a census, and the response rate was a very healthy 39.6%. These findings can therefore be generalised.

The broader retail industry is in an era of transformative retail change[71] in which online shopping, multichannel retailing, international retailers, the rise of a convenience culture and out of town developments have all contributed to a turbulent economy and trading environment for retail firms.

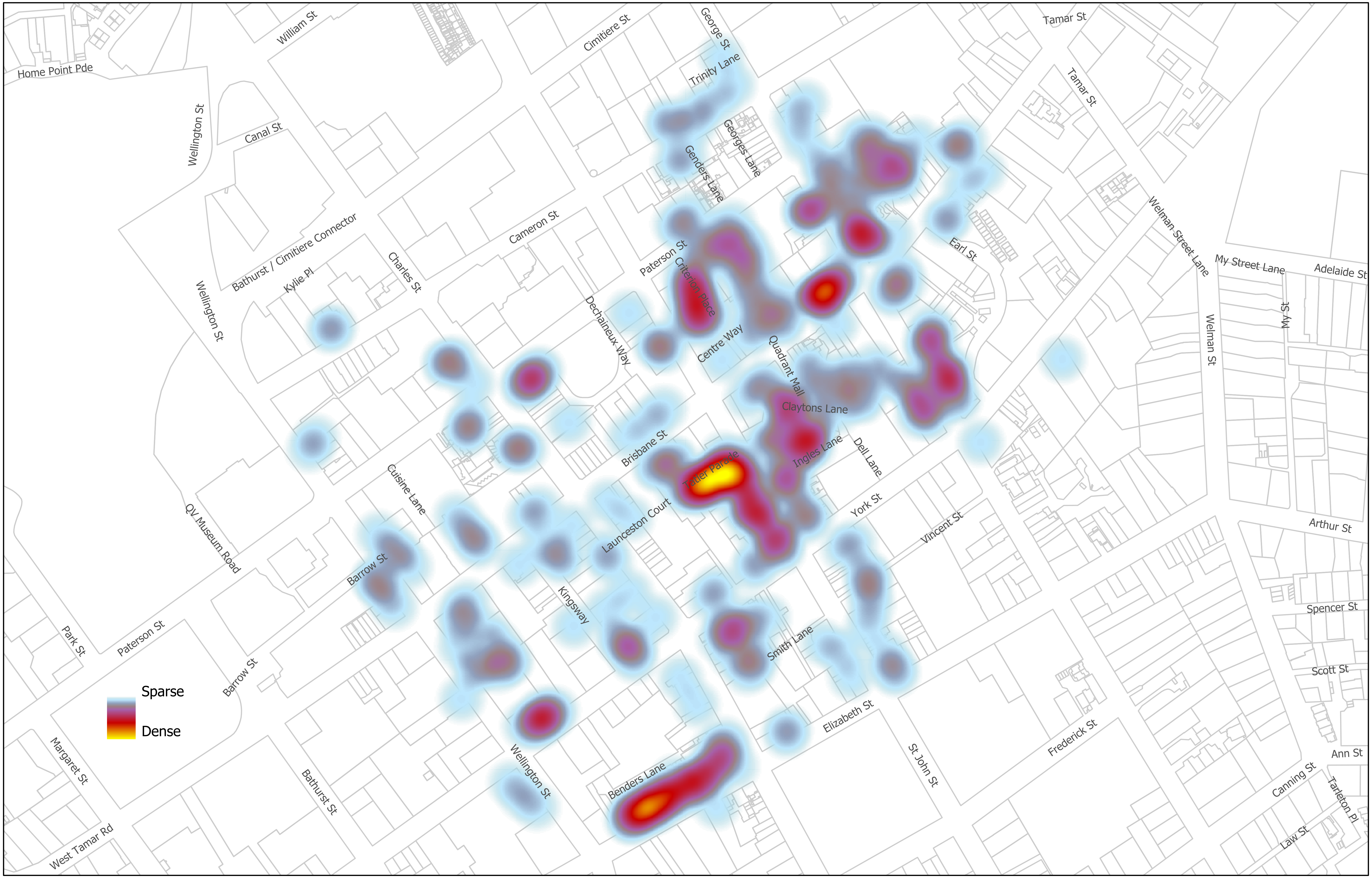
Trading conditions are challenging for the retail sector in Launceston (as in other areas around Australia and internationally) but the data actually shows retail vacancies in Launceston are at lower levels than they have been previously, new businesses continue to open and there are many retailers that are trading strongly. There are factors identified in this study that require attention from various stakeholder groups including the City of Launceston, Cityprom, the Launceston Chamber of Commerce and also by individual retailers. In particular, it is imperative that retailers seek to address the changes in consumer shopping behaviour and the transition to a digital economy. Physical retailing will always be important for shoppers, but consumers are increasingly demanding a *choice of shopping channels* through which to engage with retailers. Some stores in Launceston are making, or have made, the transition to offering an online service in addition to their physical store/s, but there are many that have not yet done so.

If town centres are to survive, and thrive, they will require all stakeholders to work collaboratively rather than competitively. Retailing and consumer shopping behaviour is undergoing a significant shift and it is imperative that individual retailers, as well as membership associations, other representative bodies, and all levels of government, work together to ensure the resilience and ongoing sustainability of retail precincts. This requires decisions to be made based on evidence rather than conjecture - the very future of towns and cities around Australia depends on a cooperative and informed approach.

[71] Millington, S., Ntounis, N., Parker, C. and Quin, S. 2015. *Multifunctional Centres: A Sustainable Role for Town and City Centres*. Institute of Place Management: Manchester.

Appendices

Appendix 1 | Heat Map



City of LAUNCESTON

CBD Commercial Vacancies Heat Map 2014-2018

G:\GISMapping\Map Requests\Bruce Williams\Projects\CBD_Vacancies\CBD_Vacancies.aprx

Scale at A3 : 1:3,000

0 100 Metres

N

NOTE:
While all reasonable care has been taken to ensure the accuracy of the information portrayed on this plan its purpose is to provide a general indication of the location of Council services. The information provided may contain errors or omissions and the accuracy may not suit all users. A site inspection and investigation is recommended before commencement of any project based on this data. This note forms an integral part of this plan.

Printed: 23/07/2019

A3L

Appendix 2 | Cityprom Boundary Area


CORNWALL SQUARE TRANSIT CENTRE
Cimitiere Street
POLICE STATION
TOWN HALL
CLOCK TOWER
Cameron Street
YORKTOWN SQUARE
George Street
CIVIC SQUARE
MACQUARIE HOUSE
LIBRARY
HENTY HOUSE
Charles Street
Paterson Street
BRISBANE COURT
BRISBANE ARCADE
CENTREWAY ARCADE
PRINCESS THEATRE
EARL ARTS CENTRE
Earl Street
Cameron Street
Brisbane Street
COULTER COURT
QUADRANT PLAZA
QUADRANT MALL
BRISBANE STREET MALL
St John Street
TATLER ARC
DELL LANE
Wellington Street
CUISINE LANE
Brisbane Street
Kingsway
York Street
POWELLS ARCADE
VINCENT STREET
Elizabeth Street
Prince's Square
ATM
Legend
Travel & Information Centre
ATM
Multi Storey Car Park
Parking
Taxi Stand
Post Office
Parenting Facility
Male Public Toilet
Male & Female Public Toilets
Wheelchair Accessible Toilets
Street Direction
Pedestrian Access Only
Pedestrian & Vehicle Access (Not thoroughfare)

Appendix 3 | Retailer and Services Businesses Survey Package

UNIVERSITY *of* TASMANIA

TASMANIAN SCHOOL OF BUSINESS AND ECONOMICS

11 April 2019

Dear Owner/Manager

'Shopping in the City Project'

We would like **your views** about shopping in the Launceston city centre.

Invitation

I would like to invite you to participate in a research study investigating drivers and barriers to shopping in the city in Launceston. This study is being conducted by Dr Louise Grimmer, Lecturer in Marketing and Retail Researcher at the University of Tasmania. The aim of the study is to look at the various factors that traders in the city centre, shoppers and key stakeholders consider to be important for either encouraging or discouraging shopping in the city. This research has received funding from the City of Launceston. The following information is provided for your consideration.

What is the purpose of this study?

This research project aims to examine the reasons why people choose to shop in the city centre of Launceston, as well as some of the factors that might prevent people from shopping in the city. The project also seeks to gather information about improvements that could be made to the overall retailing and shopping experience in the city.

Why have I been invited to participate?

You have been invited to participate in your capacity as a business trading within the 'City Prom' boundary in Launceston. This boundary area is the 'population' for this study.

What will I be asked to do?

A paper survey is attached to this information sheet. We would very much appreciate you taking approximately 10 minutes to complete the survey and place it in the supplied envelope. A Research Assistant will collect your completed survey within the next seven to fourteen days. You will not be asked to provide your name, nor the name or address of your business. All survey responses are completely anonymous, and your answers will be treated confidentially.

Are there any possible benefits from participation in this study?

To date there has been little research conducted in Australia, and more specifically Launceston, that examines factors that encourage and hinder shopping at specific locations. Given that retailing is such a significant contributor to the economy and local shopping is very important for communities, the findings of this study will have benefits for local traders, other city businesses and residents of Launceston.

University of Tasmania
Private Bag 84
Hobart Tasmania
7001 Australia

T +61 3 6226 1587
E Louise.Grimmer@utas.edu.au
www.utas.edu.au/business-and-economics

ABN 30 764 374 782 / CRICOS 00586B

This study is also seeking the view of people who shop in the city and other key stakeholders in the Launceston business community. Your contribution as a city business is extremely valuable to the outcome of this study and I would be very grateful for your input. It is anticipated that the findings from this research will provide insights into improving the retail and shopping experience for traders and customers in Launceston's city centre.

Are there any possible risks from participation in this study?
There are no foreseeable risks with the study.

What if I change my mind during or after the study?
Participation in this research project is entirely voluntary and your consent to participate is implied by you completing the enclosed survey and making it available for collection. Your responses will be treated confidentially and the information you supply will only be used for the purposes of this study.

You may choose not to participate or to withdraw your participation (up until your survey is collected) without providing an explanation. If you choose to withdraw your participation once your survey has been collected it will not be possible to remove your unidentifiable data.

What will happen to the information when this study is over?
During the data collection period, all data will be stored securely on a password protected computer in a locked office at the University of Tasmania (Sandy Bay campus); the data will also be backed up to a secure UTAS server as per the UTAS Data Management Policy. Only the Chief Investigator and the Head of School of the Tasmanian School of Business and Economics will have access to the data. Upon completion of the study, all data will be stored securely on a password protected computer in a locked office at the University of Tasmania (Sandy Bay campus) for a period of up to five years from the date of publication of the study results. The data will then be destroyed.

How will the results of the study be published?
The findings of the study will be provided to the City of Launceston to help inform decisions about retailing in the city and published in academic journals. The information you provide will not be identifiable in the publication of any of the results. If you would like a copy of the results of the research, please email the Chief Investigator and a copy will be made available to you once they are finalised.

What if I have questions about this study?
Thank you very much for taking the time to read this introductory letter, and for helping make this study possible. If you would like to discuss any aspect of the research, please feel free to contact me using the details below.

This study has been approved by the Tasmanian Social Sciences Human Research Ethics Committee. If you have concerns or complaints about the conduct of this study, please contact the Executive Officer of the HREC (Tasmania) Network on +61 03 6226 6254 or email human.ethics@utas.edu.au. The Executive Officer is the person nominated to receive complaints from research participants. Please quote ethics reference number [H0017968].

Consent
Completing this survey and allowing it to be collected by the Study's Research Assistant is evidence of your consent to participate in this study.

How to complete and return the survey
This information sheet is for you to keep. If you would like to be involved in this study, please complete the survey, enclose it in the supplied envelope and leave it on your counter ready for collection by our Research Assistant who will be collecting surveys within the next seven to 14 days.

Your assistance is greatly appreciated and very important for the outcome of this research.

Warm wishes

Dr Louise Grimmer MAMI, CPM, MPRIA, FIPM
Chief Investigator | Shopping in the City Project
Lecturer in Marketing and Retail Researcher
Tasmanian School of Business and Economics
University of Tasmania

‘Shopping in the City Project’ Survey

Question 1
Using the following *Australian and New Zealand Standard Industrial Classification* (ANZIC) retail codes **please circle the number** next to the section of the retail industry which is **most** applicable to your business (please leave blank if you are a non-retailing business):

1. Supermarket or grocery store
2. Specialised food retailing
3. Furniture, floor covering, housewares and textiles
4. Electrical, electronic and gas appliances
5. Hardware, building and garden supplies
6. Recreational goods (including sport and camping equipment, entertainment media, toys and games, newspapers and books, and marine equipment)
7. Clothing, footwear and personal accessories (including watches and jewellery)
8. Department store
9. Pharmaceutical and other store-based retailing (including cosmetics, toiletries, stationery, antiques and used goods, flowers and other miscellaneous store-based retailing)

Question 2
How many years has the businesses traded in the city?

___________ years

Question 3
Apart from yourself, how many staff are employed for this business?

Full time ______ Part Time ______ Casual ______

Question 4
Does your business have a website?

Yes______ (Please go to Question 5) No______ (Please go to Question 7)

Question 5
Is the website e-commerce enabled (i.e., has a shopping cart for online shopping)?

Yes______ (Please go to Question 6) No______ (Please go to Question 7)

Question 6
Do you offer a ‘click and collect’ service (i.e., customers buy online and pick up in-store)?

Yes ______ No______

University of Tasmania
Private Bag 84
Hobart Tasmania
7001 Australia

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E Louise.Grimmer@utas.edu.au
www.utas.edu.au/business-and-economics

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Question 7
Do you offer any deferred or interest-free payment options such as *Afterpay*, etc.?

Yes ______ No______ (go to Question 9)

Question 8
If you answered 'Yes' to Question 7, which options do you offer?

____

Question 9
Which **social media accounts** does your business run (please circle all that apply)?

1. Facebook
2. Twitter
3. Instagram
4. Snapchat
5. LinkedIn
6. Other ________________________
7. We don't use social media

Question 10
What are the top five factors that you consider **encourage** people to shop in in the Launceston CBD (please list in order of importance, with 1 being the most important):

1. ____

2. ____

3. ____

4. ____

5. ____

Question 11
What are the top five factors that you consider **hinder** people from shopping in in the Launceston CBD (please list in order of importance, with 1 being the most important):

1. ____

2. ____

3. ____

4. ____

5. ____

Question 12
Thinking about the reasons why shoppers may choose to shop in other shopping locations (e.g. Mowbray, Kings Meadows, Newstead, etc.), what are the top five factors that you consider **encourage people to shop in other locations**?

1. ____

2. ____

3. ____

4. ____

5. ____

Question 13
What is your current overall assessment of retail trade in the city (please circle ONE)?

1. Positive with no room for improvement
2. Positive with room for some improvement
3. Neutral
4. Negative with room for some improvement
5. Negative with room for major improvement

Question 14
If you answered 'Negative with room for some improvement' OR 'Negative with room for major improvement' in the previous question, please list up to three **general improvements that could be made** to encourage people to shop in the city:

1. ____

2. ____

3. ____

Question 15
Please list up to three improvements the **City of Launceston** specifically could make to improve the overall shopping experience in the city:

1. ____

2. ____

3. ____

Question 16
Please list up to three improvements **you** would like to make to your individual business:

1. ____

2. ____

3. ____

Question 17
Over the last three years **sales turnover** for this business has (please circle ONE):

1. Significantly decreased
2. Decreased
3. Stayed the same
4. Increased
5. Significantly increased

Question 18
Over the last three years **customer visitation** to this business has (please circle ONE):

1. Significantly decreased
2. Decreased
3. Stayed the same
4. Increased
5. Significantly increased

Question 19
Which one of the following categories best describes the **average annual sales turnover** of the business over the last three years (please circle ONE):

1. Under $100,000
2. $100,001 to $500,000
3. $500, 001 to $1,000,000
4. $1,000,001 to $5,000,000
5. $5,000,001 and over

Question 20
How satisfied are you with the **overall performance** of your individual business
(please circle the number which best describes your overall level of satisfaction)?

Very Dissatisfied 1 2 3 4 5 6 7 Very Satisfied

Question 21
Any other comments you would like to make regarding shopping in the city in Launceston:

____

Appendix 4 | Retail and Service Businesses Comments

Q21 Any other comments you would like to make regarding shopping in the city in Launceston?

1	Smoking needs to be addressed along with groups congregating in the mall. The bus stops in St John St really need to be moved to another location.
2	We need to look at other countries to see what they are doing in their retail space while online shopping increases
3	Fill empty shops with displays/events, keep clean, Government - online shopping should attract GST and support businesses instead of stopping progress.
4	Encourage people to shop local instead of online.
5	More parking and maybe offer first hour free.
6	Use Civic Square for more activities as its had so much money spent on it and it's an attractive and friendly space.
7	I have my business on the market so I don't think things can be done quickly enough to keep me going.
8	We are just keeping our doors open.
9	Better police or security presence.
10	Support local before interstate businesses.
11	CBD shopping will continue to decline due to younger generations shopping online and the rise in retail shopping in the suburbs.
12	Encourage shoppers not discourage (any way possible) make it an enjoyable experience (good vibes). Work with shop owners. Brick and mortar shops need help to survive. Help fill those empty shops (looks like ghost town) bad look.
13	I think retailers need to also take responsibility instead of always blaming external factors like parking. Are they offering what the customer wants to buy? Are their prices competitive? Are they offering a great service experience?
14	Everyone compares parking to other cities, i.e. parking is so much more expensive in Melbourne/Sydney/Brisbane but that's not particularly true. There are so many free parking options in shopping centres and their public transport is so much better. I find it much easier and cheaper to shop either online or interstate than here in Lonnie.There is also so much more going on in other shopping locations, i.e. car-free streets with cafes and shops and places to sit and eat with entertainment so you can relax and spend time enjoying the city/shopping centre without streets to get back to car without getting fined.
15	Bus locations hurt retail businesses, hiding the window displays with shelters; crowds waiting and driving foot traffic away because of negative behaviour of those waiting.
16	Our major opposition is online shopping. Why would a punter drive/bus to city, get stuck in traffic, struggle to park, dash from shop to shop in wind and rain? A trip to the city should be savoured by people. A compelling attraction in the centre would help (e.g. Cat and Fiddle, historically in Hobart; a ski slope in the Mall of the Emirates; a towering artificial waterfall in the new Singapore Airport shopping centre).
17	Less foot traffic in the city affects our sales. Customers rush their shopping to get back to meters or won't try on due to getting back to meters on time.
18	Our customers are looking for inspiration. Shop owners can 'build' shop but need a more upbeat vibe within CBD to attract in the first instance.
19	Love the new mall redevelopments but we need to utilise them more. Make it easier to have 'market' atmosphere.
20	Many retailers need to re-think their business and address marketing, staff training, branding and have focus and stop copying others for a quick buck!
21	We need all the help we can get - decline in businesses, traffic flow, poor parking options.
22	Maybe more police presence would make people, especially the elderly and young families feel more secure.
23	The CBD environment must be viewed on multiple dimensions not just he physical environment. Parking must be removed from all traders' though-processes as an issue.
24	Since the opening of the Brisbane St Mall the behaviour of the young people has go worse. It certainly isn't the place to sit, relax and enjoy a bit of shopping.
25	More food outlets or options with loyalty cards for retailers who work in the mall.
26	I feel we are holding our own but will seriously review our future at the end of this lease period.

27 Please do something or Launceston will be a ghost town very soon. Enough talk - we need action by people who actually care!

28 I'm happy to identify myself. I am xxx of xxx a 22 year old business which is prospering but has some serious concerns about our CBD. I have aligned myself with the Chamber of Commerce but am also friendly with CityProm (I'm just outside their reach I believe). More than happy to discuss further and help with your study, these are topics that myself and others have raised with council and other stakeholders. Good luck with your research.

29 The council needs to actually listen to what retailers have to say instead of dismissing them.

30 Strive for a clean city, as in chewing gum cleaned from the pavement and graffiti removed. Dogs banned from arcades. Drunks pissing in small corners of shop fronts addressed.

31 It has to be made easy and inviting. It is about the customer, not business owners and their staff. If more streets are pedestrianised, this will do more harm to existing businesses, reducing convenient access.

32 Easier for small business rental is so high.

33 Anything to improve visitation to the city.

34 Remove old school - have term limits for aldermen.

35 Need to make CBD more engaging - log so people hate the mall - needs rectifying asap.

36 I genuinely believe store owners need to up their marketing game to retain existing customers and also find new ones. I do not believe it is Launceston city's responsibility to increase this.

37 No wage growth, disposable income decreasing with cost of living going up, margins are shrinking.

38 Need local and current business people on Council. Business owners in CBD or create a senate or similar to pass any wonks decisions made by city council elected.

39 We need action from local government to engage in our CBD business community and then to action a plan to add value to our city as a whole - where are our CBD centralised events?

40 If significant changes are not made CBD will be a ghost town.

41 Problems with groups of school/college youth hanging about - need somewhere to go.

42 More speciality shops.

43 More support from our elected council members either shopping or visiting businesses in our city. Council needs to reduce red tape and make life easier to progress as per their motto.

44 We need to get more foot traffic in.

45 Need to hear more positivity.

46 While we are relatively new to Launceston, we came from a city of 70,000 with free parking. Our door count was three times higher there.

47 A city needs to be vibrant with specialty stores and product that is not necessarily discounted online.

48 The architecture of this city is amazing. The wine industry is fabulous. Let's market ourselves.

Appendix 5 | Shopper Comments

Question 10 Do you have any other comments you would like to make regarding shopping in the city in Launceston?

1 People have limited money to spend. They need to see the value in spending it - so spending on parking is seen as a surcharge to spending on retail in the city when there are free options

2 I love Launceston but I personally avoid going to the city unless I absolutely have to!

3 Internet shopping is here to stay. The only thing to draw people back to the CBD would be cheaper prices and better service. Parking of course is my biggest bugbear and don't get me started on the LGH!

4 Fix your parking charges and more people would be encouraged to come and give it a go

5 Fix the parking issues

6 Easier, cheaper and more convenient to shop online. Don’t have to find parking or worry about someone damaging your car. Don’t have to put up with Bogans hanging around shops swearing and being twats

7 I would like to see quality stores attracted to the CBD. We are so limited in choice. For the growing families, Best and Less, Target, K Mart are ideal, but for the mature age group we are very limited in the stores who cater of our age group. Myer is my ideal store, however, I would like to see the days of Ludbrooks, McKinlays, Fitzgeralds, Touch Of Class, Silver Fox, Pretty Woman, Sue's, James Duncan, return, we had so much choice and a true draw card too shop in Launceston CBD

8 Most people have moved to online shopping as no worries about parking, more choice, no anti social behaviour

9 Please embrace the future and the obvious, build a shopping centre worthy of Launceston citizens. Kings Meadows needs upgrading and so does Prospect Vale, both of these places are already overflowing capacity and that really should tell you everything you need to know. The fact that people like me are prepared to make a 2hour journey to reach these places rather than embrace the outdoor shopping mall experience of yesteryear should also tell you a lot as well. When it comes to daily shopping people what comfort, ease and convenience , as well as experience. I can tell you having lived all over Australia in both big regional cities and smaller ones, that shopping centres aren't just about shopping, you can go there, on hot or cold days, days when you are bored and just "cruise" around, get a drink, "window shop" maybe buy something, you usually do, and there is usually some kind of entertainment for the kids, what is not to love? You can't get that from the current Launceston mall, where you need to "sniff the cheese to find a toilet, walk for miles to find the shop your looking for, a cafe?? have a pram, or disabled? forget that!!! Got the picture? I really really hope you do

10 My number one hindrance to shopping in Launceston is the availability of affordable parking. It is the key complaint amongst my social group as well.

11 I would just like to repeat my view that more shops should be filled, and that something needs to be done about Birchalls still being empty after two years and two months

12 Good luck, I really hope you guys can turn it around

13 Fill the vacant shops and find out what the people of Launceston want. (such as Big W, cheap women’s fashion like Ally, Valley Girl, Dotti etc.).

14 I think it's a bigger issue than just shopping or parking. We need to think about why people are in CBDs in the first place. Is there an opportunity to have more events, more white collar workers and residential building in the CBD? This would increase shopping if the right shopping for these target markets was there

15 I used to shop in the city all the time - very rarely went to other shopping centres. Now I only go to the city if I cant get a product or service elsewhere. It is depressing and has no soul

16 Bland and empty. Unless you want women’s clothes, a phone, or stationery - it is a wasteland

17 I now generally avoid shopping in town if I can help it

18 Please, please, please do something with this feedback. It's so depressing to see our town die this slow and painful death. Parking alone will not fix the problem! People that say that aren't considering the bigger issues. If you just say "free parking for everyone" nothing will change. Maybe for a couple of weeks you will see an influx of people but then people will realise they actually have no reason to go there

19 I only go to the city when absolutely necessary as it is usually not a lively pleasant environment

20 Please fix the mall. It's so ugly and uninviting compared to the stunning civic square

21 We moved from a Melbourne almost 2 years ago and love Launceston. Although it has enough variety of shops and eateries, more diversity is always attractive

22 Not easy to access, not easy to park, closed shops throughout the city, difficult to traverse, park in one spot and feed metre, due to poor one way streets you move to another area and have to feed another meter

23 Council needs to work hard with the owner of the Paterson St Central Car Park (Birchalls car park) to have constructed a building to accommodate shops, parking, inner city living

24 (apartments) and fill the huge hole in the CBD

25 My negative experience with Care Park has affected my willingness to shop in the city.

Launceston is a beautiful city, it is being choked by cars. A more pedestrian and cyclist friendly environment would set it apart from other cities. People don't come here to spend time waiting for traffic. The great small cities of the world are best explored on foot. The shopping is fine here, it would improve if the city became more relaxed and easy

26 to move around

I only go to the city centre when I have no possible option to go somewhere else (Meadow Mews, Bunning, etc). If I didn't have to park so far away to get free parking I would go in there much more often. Note that parking vouchers are useless, because when I go to Anaconda/Spotlight and they don't have what I am looking for I don't get a refund

27 and get incredibly annoyed and don't go back for ages

28 thank you for asking the questions and receiving a broad set of views rather than just the whingers

29 Enforce the smoking bans that are currently in place and extend these to all streets in the CBD

30 The mall is in the wrong place. Should be between civic square Cameron St end down to York Street

I enjoy shopping in the city. I also love the mall and civic square developments. Or family moved to Tasmania 2 years ago and while I do miss the convenience and shelter of big

31 shopping centres I do enjoy the quiet of shopping in Launceston without all the crowds. I think the city centre is great

32 It's dismal.

33 Add more greenery

34 It's not about Infrastructure it's about engagement

There isn't enough variety, some sales assistants aren't all that helpful, and it can be quite hard to find a parking spot - this is why people buy online. More cafes in the heart of

35 the city (the Mall) would encourage more to stay in the city - at the moment, there isn't much to choose from in terms of a good place to get a good cup of coffee.

Mall upgrade could have been much better - more natural spaces, more play spaces, toilets etc. Would've been awesome

36	We have lived here four yrs now, from WA, and absolutely love the size and feel of Launceston. We go in every Friday for coffee and shopping. I've read a lot of complaints from locals over the years, and find them to be so out of touch. The parking is extremely affordable, the variety of shops is great, there are some empty shops but online shopping and suburban centres have caused that. The city is kept clean and restored well, have a look at Fremantle, it is dead, and so run down the council should be ashamed. I used shopping malls for 30 yrs, you get the same shops in every mall, and there is not usually somewhere for kids to play, which is complained about in relation to the mall. I never took my children to a shopping centre to play. I went to shop. So all the whingeing about the city is so out of place, in my opinion. Your city is fantastic, it's vibrant and heaps of people were in town today!
37	I literally live a 5 minute walk away and seldom go to town as the fashion never changes, there are scummy bogans everywhere and the food and coffee is far too expensive
38	Cheaper cost for longer parking times would allow people more time to browse. Now it is so expensive to park, you do what you have to and leave as quickly as possible
39	I'd like to see more visible community involvement in the mall especially. Drag the public there by holding events with large networks of people attached. School choirs singing Christmas carols (mum/dad/nan/pop/brother/sister/aunt millie all roped in to come along). Invite a number of schools, have a competition, offer a prize for the best choir as voted at the event. Local bands playing on selected evenings, free "somethings" for trendies to gather. Work with influencers. Invite "the younger set" to hold one of their functions there. Art exhibitions in the mall, dynamic with artists at work. Pottery makers at work. Indoor Bowls Clubs in competition. Much more. Use the mall as a recruiting and marketing tool for those clubs/organisations/starving artists to raise their profiles (and draw public). Even if it draws limited shop sales, it fills the mall and gives the vendors the opportunity to lift their game, at the same time as the people physically taking ownership of the mall. Give CityProm an overhaul. Change makeup of the Board. Shift focus from the suppliers (vendors, owners) to include users of the product, the inner city shopping experience. At present, too much reliance on what the vendors want, its not hitting the mark. Engage with younger people who use the city, there is a wealth of brilliance in L'ton from our youth. Put three on the Board (or a sub committee). Publicise the openings involve a wider public. Even solicit schools/colleges/uni. Radio/TV /FB etc. Just by looking for the appointments to the Committee it will show the public that CityProm is making the city a great place
40	Council must reduce the rates burden on city businesses. Many are no longer viable due to council burden. The latest parking meters are not in line with the peoples spirit. i.e. they cancel when a car leaves and the new person must then pay a whole new fee. This is not attractive at all. I would rather not play the new council game and just go to the suburbs
41	The suburban shopping centres cater very well to families through activities, parenting facilities, parking and access links. The city is slow and difficult to access and navigate due to one way streets. On-street parking is terrifying if you have a young child and a pram. There is nothing to do in the CBD with a child, and only water play in Civic Square. Water play is not healthy in the winter, and the only food option is takeaway coffee. The mall needs food vendors, vans or permanent shops, play equipment, but also parenting facilities and public toilets close by, not 2 blocks away. The Council must also revitalise the area south of York Street. This should be done before the proposed Cameron St West works toward City Park.
42	Working to avoid the "donut effect" i.e., increasing the CBD permanent population, will overcome some of the negative factors involved - it will make the CBD more attractive to retail businesses, neutralize the access and parking issues, and ensure greater social interaction
43	More transparent and inclusive consultation with the community/ratepayers whose rates help facilitate such projects as City Heart as they should be major beneficiaries of any civic spend and yet too often are left disenchanted with process and the outcomes. The playpark at Riverbend could well prove to be another such project - out of kilter with its environs

44	I think that the atmosphere in the centre of Launceston is very positive, and contributes to the small-town feel which locals really love. It would be sad to see this diminish over the larger shopping centre model
45	I go into the city as seldom as possible. It is too spread out with little to attract me (other than the Graingrocer, Petrarch's, Your Habitat and the Sheep's Back). All places who sell what I need and can get nowhere else. And for treats for myself, to Ruche. I hate the feel of the city centre, and I am not into 'coffee' or eating out. There are a few other businesses I interact which that are located there, but mostly I communicate online with them. And then there is the issue of the closing times, especially in winter. If you want people to go there, having THINGS TO DO. Open the library longer hours and encourage eateries in that area. Have the library coffee shop open into the evenings and library open till 1pm at least. Encourage live music that can be listened to in undercover venues where people can do take-aways. I wonder if a 'read aloud' book would work. A book is read aloud for an hour a day in a place until it is finished, so people could have a listening experience. But that is about the people spending time. If you want the shops to have customers, then tourists have to know where to park, and for that matter WHERE THE CITY CENTRE IS! It wouldn't cost a lot for the Council to issue a map to all accommodation places so they can find where to park when they get there, and where the mall actually is. (I have directed many people who are well of track when trying to find it
46	Investigate what other similar size cities have done, in Australia and New Zealand, to draw people into the centre. We don't necessarily want to do, or be, the same but it may spark some creativity
47	The older one becomes the less one needs therefore shopping trips are less frequent. People working in the CBD are more likely to do their shopping there
48	It is my absolute last choice to shop... I now have very little reason to go there. I can get most of what I want out of the central city . When I have visitors maybe because it's what you do, show them around
49	I think quite a lot of business in Launceston have been here a long time and have not moved with the times. They must confront the changes happening in retail.
50	Thank you for the opportunity to participate
51	Let's stop listening and reacting to the 'few' who are noisiest. There are lots of people happy with the city and its future and want to see it thrive
52	Encourage retailers to increase their online presence and offer "click and collect" as an option, this would encourage people who work out of town to still purchase locally and pop in town to collect which may encourage them to visit other shops. As an avid online shopper, who works away from the CBD, I use it mainly to buy an item before it sells out, and if available, I use click and collect and browse other shops while I am in town. Launceston has lost so many great shops due to high rents, particularly in the Mall, surely having a little less rent but ongoing occupancy is a win for everyone
53	Make shop rents more affordable for tenants so they can stay in the city heart
54	I think it is okay but the empty shops are an issue, especially in the mall
55	If The Mall is going to be full of uni students vegging out when the uni moves, I'll be shopping elsewhere, that will be unnecessary congestion and no financial value to retailers. Keep the uni where it is, an absolute waste of finance to move from the present premises
56	Many Councils interstate spend significant amounts of money on trees, quality footpaths, good lighting and seating. They also have festivals where they close streets off and special occasion days such as for example Halloween where the shopkeepers give out candy to kids
57	My idea of a shopping experience is to head to Hobart and visit Eastlands shopping centre in Rosny. There is no equivalent in Launceston
58	In the 1980's, Council Officers were introduced to the United States initiated 'Main Street' retailing philosophy which encouraged and rewarded retailers to brighten up their shops/window displays and better illuminate the city streets to create a more dynamic space. What happened? Ask Tim Domeney to tell you all about it

59	loads of potential. I personally like the redevelopment of mall, quadrant and especially civic square, which is a great space now
60	I liked the time when old pianos lined Brisbane St Mall for a time, which humanised the shopping experience. Music of any quality is always a welcome addition, but not when it is blaring out of loudspeakers
61	Good but could be improved
62	Yes. The Council has been asleep at the wheel for years. Council ignores good advice & pours money into ugly, pointless & unwanted 'improvements' such as tons of concrete in the Mall & the Quadrant. The area outside the library is an ugly desert. Get out of your offices and ask real people, including the proprietors who have been forced to shut down, what they want. I don't remember ANYONE dying because of so-called faulty drains at Townsend's or Fitzie's cafe or Kameo, etc etc.
63	Reduce parking fees
64	Understand the size of Launceston and surrounds also the demographics -older population and low socio economic status of Launceston and surrounds, it is hard to attract larger "franchise" businesses to Launceston. I am ashamed to admit, I spend my dollars either on line or when travelling to Melbourne or Sydney. Hobart shopping has improved with rebuild of Myer and surrounds. Also a couple of shops in Devonport and Wynyard I shop at. (They are locally owned and have a point of difference)
65	Ensure that the major department stores remain in the city, as this is the main draw-card and without this, the city will die. The university is not going to save the town !!!
66	Need to improve parking and toilets then have activities to draw people into the City
67	empty shops because rents too high with not enough sales
68	Encourage more shops
69	The place needs to be more focused, better promoted and more accessible to pedestrians, cyclists, and other groups not fully considered.
70	Having spent a number of years living in Sydney we can definitely see a downturn in the Launceston CBD which makes it unappealing for both locals and tourists. The council needs to look at 'strip' shopping areas in some suburbs of Sydney/Melbourne or other towns to see what appeals - many of them are preferred over the big shopping centres - less crowding, noise, prettier surrounds, friendly shop owners, unique stores, heritage buildings etc
71	Parking is not a genuine reason for not shopping in Launceston. It's more a case of online shopping being easier and cheaper and the lack of choice in Launceston shops. There is enough parking - too many people are too lazy to walk more then a few metres
72	I find the Patterson St multi story parking very good but at Christmas parking in the city is impossible to find.
73	Not convinced that the Mall redevelopment is suitable. Weather in the winter makes this area too fine weather dependent. It would be better with overhead protection
74	The City could make much more of its heritage streetscapes. Perhaps the Council could offer incentives to encourage shop owners to restore &/or maintain heritage facades? The Michael Hill store (formerly Hatton & Laws pharmacy) is an example of what can be achieved, retention of the beautiful heritage stained glass and facade make it special, rather than " just another chain store" that could be found in any city. Really adds to the ambiance of the shopping experience
75	Decline in retail activity and shop vacancies in CBD is readily apparent. A shop such as Birchalls closing in the Mall makes a big impact on everyone else in the vicinity
76	I like to shop locally but I was in the mall on the crazy day sale day and noticed that there is lovely seating but no reason to stop and sit...no coffee shop or food. People were walking through, maybe we could have some popular food vans, or have a pop up cafe.
77	More musicians

78 I'd strongly suggest reducing the costs of parking. It may well entice families into the city.

79 Unfortunately decreased city shopping is a national trend. Need to benchmark success of best malls and what creates their success. Mall market days, like Bondi Junction mall on Fridays. Give present cafe owners opportunity to have food vans in mall, if they don't want to participate open it up to anyone. More special events in mall. Get the Large companies (e.g. Telstra, etc) to contribute

80 It is a pity to see shops close due to lack of custom. The city needs to attract a major retailer to compete with Myer and attract people to come in

81 Birchalls is a huge loss because it was not like any other shop anywhere

82 If there is nothing to draw families into the city of Launceston, (as commented previously), people will stay home and just shop online

83 I work out of town and only get to the city on the weekends... After 12 many small stores are closed, it is hard to find him CarePark parking, and there is no atmosphere, no music, no colour and no cover when hot or rainy. It feels very disjointed and unloved and the mall desperately needs a cafe or two

84 Why would you? Point of interest, difference, attraction, what would draw me to the CBD? Need to make it worthwhile and rewarding. High level of customer service, roaming entertainers, competitions, activities, music, outdoor dining experiences, close off streets to traffic, drama matinees, drawcards, attractions, make reasons to be there

85 Fix the parking first, give vouchers in rates for free parking at Council owned car parks. Get your rate payers in the city again, reward them for coming in. Fill the Birchalls empty shops with quality shop holders. Mall with empty shops does not look good for our city. Encourage Summer trading hours so when tourists come to the city it looks vibrant of an evening, maybe til 7pm. They wander around with no where to go, its all closed up

86 Do not give up on our city. It has the most wonderful architecture and this needs to be celebrated. Visitors love it and we need to get our own citizens back to that frame of mind as well

87 There seems to be a general deadbeat culture in the mall, which I find discouraging. There is nothing in the CBD which makes me want to go in there

88 The mall redevelopment hasn't worked. More plants are required. It is empty and sterile.

89 Get a more proactive council

90 I think people are coming in to the city for business more, less likely to come in for shopping

91 In the 70s and 80s we used to love coming to Launceston to shop. Staying in local hotel/motels to make the most of the experience. Today we avoid the CBD as much as possible. More often than not I drop off my partner as close to the required destination as possible then drive around and around or park on the edge of town until called. 10 minutes of driving around is less stressful and cheaper than parking. Online shopping or outlying areas are becoming the norm. I wish it could be otherwise

92 I remember it being inviting as a child, I'd love for my children to feel the same, these days it feels unaffordable, as much as I'd love to support businesses that are still hanging in there, the navigating traffic, accessibility of affordable parking, make it much easier to just shop online and take the children elsewhere for a day out

93 I on the whole come into the cbd once a week. I usually come in for a look but quite often don't buy anything or need anything. I go to the library or bank. I just think people don't have the disposable income anymore and just buy what is necessary. So spending too much money on improvements won't make too much difference. The mall and the civic centre are nice areas. I like the new paving etc. not sure about all the Tassie Tigers though. It is bright and easier to walk around

94 Make York Street and Paterson Street two lanes only

95 Shopping in Launceston is a frustrating experience

96	It has so much potential. Address the traffic issues!
97	Generally speaking ,as a resident of Launceston for the last 8 yrs. (came from south aust.)I really enjoy living here & the city always seems to have something happening...festivals..music..arts..shopping days
98	The improvement works at the Library and the Mall have been fantastic - pat yourselves on the back and make it more widely publicised. Try to improve traffic flow - the Bunnings corner is useless now and the McDonalds corner in Invermay isn't much better (probably worsened by the backlog at the Bunning corner). Invermay Road to Mowbray is also a bottleneck. Not easy or short term but it desperately needs some improvement
99	At the moment there is nothing to attract potential shoppers. They face barriers in the form of expensive parking, too much traffic, not enough decent shops, not enough shop assistants. The shopping areas are fragmented over a number of city blocks. I would like to think that some/all of my comments made in this survey are followed through
100	Many shops do no offer good client services which encourages online shopping
101	I avoid shopping in the CBD like the plague! You can never find enough Carparks, and if your late back by even a minute or 2 you cop a fine, shop access is poor. As much as I love Launceston and the surrounds I refuse to shop in the CBD unless I have absolutely no other option
102	Staff - most of the small, locally owned retailers seem to know about customer service while the chains do not. Too many young people, poorly trained working in the shops makes people less inclined to spend money there. Business - constantly complain about people not shopping there and yet they fail to realise it is THERE job to entice shoppers. There needs to be less empty shops AND also a program to clean up some of the facades - the new "uncluttered" Mall allows you to see just how poorly some of the facades are doing (no one wants to look at decay
103	I mention toilets a lot. Most of the public toilets are disgusting. They smell, are dirty, and tend to have dodgy people hanging around. The new toilets in Prince's Square are just lovely, such a shame they are in a really bad location - a long way away, and always have bad people hanging around. Toilets behind Comm Bank call centre are awful, as are City Park. I will only use Myer toilets (and Harris Scarfe when they had them) - goodness knows what will happens if they close them
104	The city centre is dying and until I recently changed jobs and started working in the CBD, I very rarely went there. I can do almost all my shopping in the suburbs and it’s very convenient, without the expensive parking and all the bogans
105	I found going shopping in the city a chore rather than something I enjoy. There needs to be more atmosphere and cheaper parking
106	For someone who relocated to Hobart on his last visit north summed it up well Launceston is a ghost town.
107	Local shops can't compete with online retailers for price but many offer excellent service and we should encourage shoppers to support them. It annoyed me when people complained re shops closing yet they didn't support them - most recent example Collins Bookshop
108	Too much money was spent on expensive materials & art instead of on smart design. Unfortunately Brisbane St. Mall is not local, visitor or tourist friendly. Potentially , it could be fantastic. Do yourself a favour, go over to the mainland states & look at how well designed shopping precincts (CBD's) & suburban shopping centres are with great facilities, atmosphere/ aesthetics & free parking. They get the basics right
109	Check out George Street and replicate what makes this street successful compared to others. Online options provide better choice and better information for some categories of goods. Too many boring and pedestrian businesses with little to no reason to shop there. It is incumbent upon each business to provide a unique shopping experience and convince shoppers to revisit
110	A "quick fix" won't help anyone. Town took a huge blow when Birchalls closed, and even when that was here there were already so many issues. Please listen to the people, who have made the same suggestions, for years

111	A free parking period
112	The Tiger bus is a great resource, it would be good to offer something similar with parking in different places. It is a nice place to shop with a good street scape, keep those new buildings low please
113	The CBD needs revitalization and that will come about with people. These are unlikely to come from the university development: largely the wrong (penniless) demographic. Rather than attempting to restore the CBD to what it was, consider what it could be, with people being able to live in the fantastic period architecture (made modern and accessible by great local architects) and who would by their presence create a need for renewed and re-imagined retail
114	If you want me to leave my home and pay parking etc, the City needs to give me a luxurious, convenient day out. If it is difficult and uncomfortable I will just shop online
115	Have I mentioned the parking. Honestly if councillors had to pay for their own parking while attending to council business, being aware of two hour limits, etc etc, surely they would realise what a killer parking is in Launceston. Not movie star parking smack bang outside a particular place, just the extortionate prices charged by Care Park, that previous councils sold off for the quick influx in a balance sheet
116	You have to communicate better with the public and that doesn't just mean the Council telling us what will happen, it also means the Council must genuinely listen because the Council is our "representatives", you are there by the grace of the people. A Council must not arrogantly consider itself to be superior or to be the font of all knowledge. There are countless good brains in the community belonging to people who genuinely care for this City
117	There is no directory that I could see to help visitors with where things are in the city, Create a visitors stand in the mall at times of peak. Encourage volunteers to assist with directions and advice
118	as a local I have very few reasons to visit the city these days and having to deal with the mall rats isn’t a pleasant experience
119	Went to Harvest Market, plenty of people about, walked to CBD later, both Malls, and shops deserted, and this was on a beautiful sunny day
120	Launceston has huge potential but it needs a forward thinking Council. Many other regional cities have turned themselves around, there’s no reason why Launceston needs to reinvent the wheel here. Just do a case study on what people have done before us - see what works and what doesn’t. It’s not rocket science
121	Parking needs a serious look at, rather than using it as a cash cow. Maybe councillors should try parking on the street to realise the problems businesses face
122	the empty and gone out of business shop 'image' needs to be addressed somehow, it really is blight on the landscape
123	Just get people into the city.... Spoilt the friendly Mall by making it Unfriendly.. Not all relaxing.. No children enjoying themselves or mums having coffee or the oldies meeting and chatting..... Very very sad.
124	Council wastes money on little things with no foresight
125	I live in 7250 area and work in York Street, so find it very easy to shop in our wonderful City of Launceston. I am lucky to be able to do some quick rounds of the city centre in my lunch time and after work. I much prefer to shop in the city centre than in the suburb shopping centres
126	The economy has changed and things that used to have to be done in the cbd can now be done at home i.e., banking, insurance claims and of course shipping. I also do not think the cost of parking is an issue as it is often hard to find a park, therefore there are plenty of people willing to pay for it
127	Launnie is a lovely town. Try serious incentives for owners to lower rents to encourage innovative bricks and mortar businesses to provide creative, enticing shopping experiences
128	I feel that the issue is not as much drawing people to other shopping areas, but online shopping for better prices, not sure how to manage that

129	Most people shop online, it's a given. You can't order food online (yet!) The only way to give people a reason to go into the CBD is through food & wine. When the shops close at 5, another segment of the market comes into play through dining and social pursuits
130	Shops understaffed
131	A greater Police presence in the mall and more kids entertainment, Chess board, fairy garden. Have a look at some of the malls on the mainland, bring some ideas to Launceston
132	I still like shopping in the city and will continue to do so. I would love it to be busier.
133	Much easier to park and shop in the suburbs
134	What happened to the 'lunch time' rush. Its hardly there anymore compared with past years and decades. I suspect its because we the City workers don't have 'lunch hours' anymore - go out buy lunch and do some shopping or window shopping. If anything we grab a bite to eat at the desk and don't go out of the workplace. Add to this the loss of workers from state and regional offices of the public service and the commercial sector (moved to Hobart or Melbourne) then there is a lot less cashed up shoppers about the town during the day. Don't under estimate the loss to internet shopping - its quicker to get things from England/USA than Launceston and Melbourne
135	I do enjoy shopping in the CBD but always feel like I need to rush as my parking is about to expire. I'd be more inclined to stick around and spend more time (and possibly money) if a better parking solution could be found. Also tend to get put off by cold days or bad weather because I know it's all open air
136	I think we have a great little CBD and with a few new quality retail offerings it would be even better. Retailers also have to keep up with the times and have a digital presence
137	Fill the empty retail outlets it looks terrible
138	Remove those dangerous little devils in the Mall before someone has a nasty accident
139	have a look at the Devonport redevelopment: inviting, dining spaces, large video wall, attractive inviting spaces.
140	This is very big picture, but with the eventual relocation of the University to Inveresk, combine Launceston and Newstead Colleges at Newnham Drive and turn both campuses into residential accommodation. It would decrease the number of Year 11/12 students in town rather than in class
141	Keep on trying to make a difference - so many people want to be part of a successful city future and opening up these conversations are a good start!
142	Retail shopping has drastically changed in the last 5+ years. Most things we need can be bought online cheaper and easier. We need a reason to go into the city - an experience. Local retailers are not innovative enough. I suggest a series of free / subsidised workshops on different topics teaching retailers how to move with the times. (Having an online presence. Targeting local markets through FB. Creating retail / multi service experiences. How to stand out from the crowd. Etc.
143	It's difficult for small business retailers to compete with Office works and online sellers, cut them some slack with rates other costs to help them get ahead
144	Please consider free parking
145	Some days when I go through the Mall you can count on one hand the people there, also the same in some of the shops. We really need a something to look forward to going into the city, making people of all ages that its a great place to be
146	The two main issues with retail in the CBD is the lack of online presence and the poor customer experience in many shops. Those that have addressed those are clearly doing well, and building communities around their bricks and mortar establishments
147	Cheaper parking
148	It is very good you are engaging with the community regarding shopping experiences in the city but please take heed of the feedback you gather

149	Businesses need a social media presence or be able to show what they have in store to encourage people to shop locally
150	We need better and more accessible parking. I would suggest Free on street timed parking. After the timed period, if you over stay then you get booked. I have been suggesting this for many years
151	Online is only going to increase - is shopping going to be the future of cities or will we be increasing our leisure activities in central city areas. The first signs of this are the increase in hospitality (i.e. restaurants / cafes) based operations
152	Council need to take some risks...I don't think business as usual is an option...let's try making off street parking as cheap as possible and see what happens
153	I would be more likely to shop in the city if there was greater emphasis on quality products. There are a lot of cheap clothing stores which don't provide what I'm looking for
154	Apart from the regular arguments in regards to having cheaper and at times free parking. I think over time if events and festivals can continually be in the city periodically over a year period this will bring people into the city and hopefully experience a positive atmosphere and experiences. With the event but hopefully also the feel of the CBD
155	Increase of tourism numbers
156	I live in TREVALLYN and enjoy going down into the city for Coffee and can get the vast majority of things I need. I particularly like the Mall
157	As much as we love to support local business, I would say that the lack of some of the big box retailers really effects Launceston's shopping experience. In all honesty, I go to Hobart or Melbourne to do a lot of shopping simply for the variety of stores. Also the lack of having some of the chain stores we already have, not in the city is a deterrent. I.e. other cities have a Kmart, Big W, shiploads, reject shop - those types of shops also in their city. At the moment, people can go to these stores without coming into the city. I would love to see the quality of shopfronts reinvigorated. I believe Hobart CC did a project where they assisted stores to upgrade their shopfronts, and fined them if they didn't (not 100% on the facts here). I believe the lack of sophistication in our shopping experience really lets the shoppers down. We very much look like a rural place to shop rather than a high end city. Ppl come to Launceston for everything else other than the shopping. The empty storefronts also give off a ghost town feel and no one wants to go shopping in a ghost town! I don't think that events in the city work as a way to get shoppers in. I would prefer that kind of money to be spent on making the experience better so people want to come in and shop on an ongoing basis. Rather than coming in for a one off event and never wanting to come back after that
158	Fix the parking meter problem - min 3 hours. Make sure when Council are doing upgrades (i.e.. Quadrant) that they consider the small businesses in the area and ensure they aren't disadvantaged due to those works. It was terrible to see shops in the Quadrant closing because Council didn't undertake the works in a more timely manner. Council should have also provided the businesses with the ability to put signage at both ends to advise the public they were open. So many people thought the works were the entire way through and the shops weren't open. Especially tourists
159	Having good food/dining options in the city is important
160	Install over head traffic lane indications because people change lanes at the last minute to comply with lane markings thereby causing traffic flow issues. Improve solid lane markings so that traffic turning left cannot immediately move across two lanes into the RH land and vice versa
161	I believe that the CBD could benefit from a large, all under one roof shopping centre.
162	Landlords need to be better engaged too - rents, facilities, shop developments would all go a long way to helping attract a more diverse retail offering. It seems landlords are content to just take rent and not be proactive or flexible, but they could contribute to a more positive shopping experience

163	The Mall used to be comfortable place to sit, during the Mall redevelopment the seats were replaced with very uncomfortable bench seats. The raised platforms encourage young people to sit on them, charge their phones while sleeping. When not sleeping swearing and abusing people who walk by. Hearing foul language from young people perched on top of the raised platforms is not a good look and discourages me from shopping in the Mall
164	More varied events in CBD/Civic Square
165	I think Launceston city is slowly dying and something needs to be done to stop the rot. Some smaller towns have been quite creative in finding ways to establish a point of difference which sets their town apart and hence makes it worth a visit. Neither the town center or the city in general has done this and is paying the price. It lacks colour. It lacks personality. It lacks vitality and has little or no soul. It is just a bunch of shops, shops you get everywhere else. Customer service while not terrible is so- so at best. This is the third state I have lived in and I love Launceston but it has been downright lazy or unimaginative in dealing with the twin problem of shrinking disposable funds and online competition. The advantages of personal shopping are not being marketed and the shopping experience is somewhat beige-like and it need not be
166	The mall is such a disappointment. Compare it to Hobart's mall where there are inviting seats, cafes where you can sit in the mall itself, decor is mellow unlike our stark and prone to a lot of glare mall and there are activities areas for children. I am also concerned about the 'trippable' sculptures and poles that those with visual impairments would find difficult to distinguish. We have such beautiful old buildings in Launceston but I don't believe that our mall is in Sympatico with this, but rather is extremely incongruous and jarring to the eye
167	It would be great to see pedestrians prioritised in more of the CBD. Launceston is very car centric
168	The local customer visitation I think has decreased and shops have closed. Tourist shopping has increased. it would be sad to see our city shopping experience become tourist centric. We need to get lots of unique shops and small startup businesses back into Launceston. I talked to the owner of a health food shop recently. she said that she gets a lot of trade from visitors because she is in a tucked away corner of the CBD. I believe that she would have an amazing 'High Street' product but would be crippled by the rentals. if the rentals stay high then our streets will fill with National or International chain stores. It was very obvious to me in the UK that every village, town and city suburb all had exactly the same shops. This was very obvious to me as I had just spent 4 months in France and Spain where their villages towns and cities still have their own small businesses
169	Great book stores
170	Please listen to the feedback - it is a great cbd area with beautiful buildings. Don't let them be demolished or replaced with high rise. Must be kept low rise
171	The shops are good for range and pricing but the heart of the CBD is uninspiring. The bogan element is more obvious than out in the suburbs shopping. Apart from the library precinct the CBD is not a comfortable environment for either senior citizens or people with young children. Signage around the CBD to local and visitor services is well below overseas standards
172	In the day and age of online shopping, a precinct must offer convenience and safety to compete
173	Online shopping is affecting shopping in the city
174	Take a leaf out of the Ulverstone shopping experience, always busy and free parking !
175	There are more tourists now around the city, which is nice, and also nice new areas built in civic square and the mall. The mall is missing cafes outside, or maybe even food vans, inviting people to hang around rather than just pass.

176	Parking in Launceston makes shopping stressful. Why would you. I wouldn't even meet a friend for coffee in town. As soon as I park, you are chasing me out. Free parking in the suburbs, relaxed meeting with a friend, maybe buy something while there. I refuse to park in corporate car parks, most people I know say the same thing. They are just awful, spoiling our city, get rid of them. Worst regional cities for parking I have been to are Launceston, Hobart and Bendigo. Best city - Ballarat
177	I think there are areas in the city which seem to be really coming alive. For example George Street now has some terrific little cafes and it is quite vibrant. How does this happen - was it serendipity? Could we learn from that? Each time I go into York Town square I am disappointed how quiet it seems. The shops could be interesting but it seems not to have much to draw people to be there. I know it has the night market - maybe it is different at night but during the day it is not so.
178	People can drive through/past Launceston to weekly shop elsewhere, the reason for reduction in shoppers. Pensioners free shopping Once a week Council vouchers should be given as 52 for the year and used as needed, at the moment any unused are lost, this is a big thing, pensioners cannot always make appointments after 3.30, or do everything on the one visit, Launceston has our Doctor, Optometrist, Osteopath, Library, Council, bag/shoe repairs, Pharmacy, Health food shop, Bank etc, sometimes visiting Launceston three or four times a week. We would like to visit Launceston for pleasure too, meeting friends, lunches or just a coffee (don't always have time for that because of parking restrictions and Meters and the cost of them). The Council car park in Paterson Street (Cnr George St) is often Full, so we have to find other parking. I remember when Devonport introduced parking meters, I read in the papers that the shops suffered even closed up and left, parking meters can deter tourists too and you must remember that Tasmanians have to pay tourist prices too, our visitors from Qld said they had to pay $3.20 an hour behind Myers, they didn't know how long they would be there, they also said Launceston parking was more expensive than Hobart also the Hobart parking was better around the waterfront for tourist access
179	Tourists have increased yes re: above - but it's like a ghost town in the mall. Get some anchor tenants in the CBD - big brands - Aldi, Big W etc
180	People come into Launceston CBD usually for specific reasons/products Traders need to innovate to provide good service and more of an experience. It is not good enough for traders to say we don’t have it but you can get in at our online store - they need to order the product for the customer so customer goes back rather than sitting at home buying online
181	previously there was a "hub" in the main mall area , Birchalls closing has diminished the atmosphere in the mall area , it would be good if the section between George and Charles Streets had a more homogeneous nature
182	Council should concentrate less on things like football or footraces and consider the needs of those residents that pay the rates
183	Designated bike paths
184	It's a shame, but I personally avoid shopping in the city centre. Accessibility to stores is far easier in the suburbs and less hassle than having to go into the city. And I try to avoid at all costs travelling to and from the city from around 2pm to 5pm Monday to Friday due to the poor traffic flow, especially when coming from Newnham into the city.
185	Council needs to invest and listen to what the workers in the CBD are saying. We want food and beverages in the Brisbane St Mall. We need Myer to stay in the city, otherwise the town will die!
186	Making the town centre a welcoming, unique, environment will be crucial to differentiate from online shopping over a 5year horizon. Penguin probably the best example of a Tasmanian town appearing to do this well
187	I miss Birchalls every time I go to town!
188	Extend pedestrian access within central CBD to include St John and Brisbane Streets.

189	After receiving fines I shouldn't have when I first moved here I am now afraid to park in the city. And because I have to park outside to go in I rarely shop there. Accessibility for me in Launceston is a nightmare
190	Holding more events and festivals in the city will also attract people to come in I know you already do this but use of social media to advertise and spread the words is powerful
191	High rentals largely responsible for businesses to move out of the city centre. Some incentive needed for property owners to keep rentals reasonable. Disincentives to high rentals and vacant shops may be to scale council rates according to level of occupancy
192	Develop more parking with an encouragement for those who do venture into CBD to stay longer . Look at access - re Free Buses , have a look at Wollongong Free bus service - Buses are always full - run every 10 Min in 2 directions (during the day) which feed the University , the CBD and popular accommodation areas As we know if CBD dies so , valuations of CBD properties drop and then the burden of rates is passed onto homes - so expenses on CBD are not expenses as such but preservation of income for council.
193	On-line presence for shopping, you can deny the impact this has had on business. Larger businesses obtaining goods at a cheaper rate - knocking out the small stores. Small/local stores need to become creative to keep their clientele. I strongly believe that parking is not the issue
194	I dislike Crazy Day - I do not want my shopping experience to be frenzied or crowded I think one of the big advantages is that everything is so close in our CBD - a quick walk from one retail outlet to the next I like the Civic Square precinct and the way it is being utilized I like the new mall but it seems to be more of a walk-through space than a CBD hub now I love the edible garden and seating near Croplines
195	An national problem may be that there is less disposable income around. People happy to shop online from home and avoid the increasing traffic chaos in Launceston especially in the morning and afternoons. We can't have projects like all the shops at the Bunnings north complex, the silo hotel and expect the existing traffic management to cope with the ongoing chaos
196	The councillors need to do the job they are paid to do, get out and speak to ratepayers. Our opinions matter and who knows we may have some great ideas
197	shops or the general area was more pet friendly and accessible with traffic/parking
198	Help businesses stay open. Cut rates, rent etc for 12 months and see if that improves the morale of the business owners. More money they can put into their own advertising to get people into their stores etc. If not, they wont be able to pay their rent anyway and close, so better to have them there paying half costs for 12 months to help them have funds to come up with ways to draw people into the city
199	I have recently moved back to Launceston and to be honest I did not go into the city for over 6 months on my return. The reason was why. The quality of shops is bad, if the weather is not good, you have to dodge drips and puddles. Parking is not the issue as the parking lots are nearly always empty when free parking is offered - so go figure. People have been spoilt with shopping malls etc - so the only way to get people back in is to recreate this experience. The mall would be very easy to fix with more covered structures. This in my opinion would solve a lot of the issues
200	I hope we can continue to encourage city shopping because it's integral to our city's survival and community building. I work away from home but I always try to shop whenever I'm back in Launceston and shopping in the city is my time to enjoy my town. Love your work
201	Make it interesting
202	The shopping area is unique to Launceston and I think the city should embrace this. The mall is a lovely space but had no atmosphere and can be intimidating sometimes
203	The mall needs shelter and some nice cafes/restaurant (think George Street) within it
204	For the L.cc not to be so hungry. And if anything new comes along I.e. food trucks etc. Don't knock it back. Embrace the development. Don't knock back

205	Visitation is not only about shopping. Shopping is one of many experiences a city has to offer. Christopher Alexanders' Book, A Pattern Language, (in LINC) should be compulsory reading for all those involved in development of the city. Pity Council cannot adopt Alexanders principles in the city's development. Council should be prepared to trial (and evaluate retail activity and visitation) time restricted free parking in the city - why not offer free parking for a month?
206	I think it would be tough going being a retailer in the CBD with high rent and competitive online shopping. I understand this makes it hard for local business to flourish, but if there was a way this could be encouraged or supported I think it would impact on our tourism experience. The shop closures do have an impact on the overall feel within the city. I'm not sure how this can be prevented
207	We have one of the most attractive CBD areas in Australia. Vital to preserve and improve the streetscape
208	Fill all the empty shops
209	A bigger better food court would help bring people into the mall/centre, just look at Melbourne and those great big shopping centres and DFO's, always busy!!
210	Encourage the owner of the Birchalls building to develop it. It's such a shame that this building is not in use.
211	The mall is uninviting and cold.
212	A lot of professional businesses and not for profits operate in the CBD and this detracts from the retail look, feel and experience of the City. There could be precincts for this activity
213	Anti social behaviour is not welcoming but this is not a constant problem.
214	Put residential uses back into buildings originally designed for residential use (terrace houses in Cameron St & St John St/Elizabeth St/George St; and put offices and commercial uses back into commercial buildings.
215	Return to public pedestrian spaces accessible outside eating areas, at least one of which was removed during the recent unsatisfactory 'upgrades' to Brisbane St Mall
216	Parking is too dear for people to go into town and so much is available online, why bother paying to shop.
217	Cheap eatery
218	Signage and places of interest need to be a part of the experience
219	George Street has lots of variety and the trees make it look attractive. Charles Street has good shops but the city block could be more attractive
220	Popups featuring tafe and uni student art and design would be great because they produce unique items and also, supporting them is a vote for the future of new business
221	As for parking. I work in town, so can do what I need while working. I refuse to pay unless absolutely necessary. I arrive to work up to 1 hour early in the morning, just to get one of the very few free parking spots that are left in the city, how ridiculous is that? This is not Melbourne or Sydney, exorbitant parking fees are prohibitive here. What happens when UTAS build near the car museum? No matter how much parking they say they'll incorporate, it will not be enough - and I'm sure the cost will be outrageous anyway
222	The commercial rates charged to CBD traders is very very expensive. Again how many cbd retailers are on the council???
223	Put all seating under cover
224	Happy to always be used as guinea pigs for trial city improvements and to offer assistance where we can!
225	Better way signage for locals including walking time & distance
226	Other key CBD venues
227	Beautify public spaces

228	The City is not family friendly or designed to be interesting for the young / teenagers.
229	Install roll-over vehicle humps and rising bollards to close off some streets at night, slow down traffic out of hours and to discourage 'hooning circuits' in the central area so as to make residential amenity there much more attractive and popular.
230	Encourage more food retailers to set up satellite vending operations beyond their shops
231	lower rent for cheap eatery
232	I like hearing buskers and seeing all the events like the v8s and Targa
233	Add some largish trees
234	Provide manned or unmanned information kiosks in current pedestrian plazas like Brisbane St and Quadrant Mall, Yorktown Square and near the Town Hall, leading shoppers to retailers and services
235	Thinking about European cities have no cars and lots of outdoor dining and plants. Could we do more of that, I do think city prom do a great job promoting the city
236	The millions wasted on Quadrant, Civic Sq and Mall would have provided heaps of free parking. It has killed business in the Quadrant. Getting the people back then doing revamps would have been much more sensible and less wasteful
237	Encourage publicly accessible events in City plazas, including music, events like Chinese New Year etc etc