

# Defying the Downturn



*national* ■■■■■■

## retail forum

Tuesday 11 and Wednesday 12 August, 2009  
Melbourne Convention Centre

# Welcome to National Retail Forum 2009



Well, what a year it's been. We've been in the midst of one of the most significant and widespread economic and financial crises ever, with much uncertainty across local, regional and global markets. Are we through the worst of it? Was it as bad or significant as we thought? What are the longer term implications? This environment is challenging the communication, pricing and management strategies of retailers of all shapes and sizes. Understanding your business, and your customers, has never been more important.

This year's programme will feature insight into the latest economic and consumer trends and a range of strategies and ideas to manage the evolving retail landscape, addressing areas such as business operations, the impact of technology, and changing communication and consumption patterns. It'll also provide a great opportunity for networking and discussion with peers and industry leaders, and don't miss the Retail Expo running concurrently in the Exhibition Halls downstairs.

Content development for the 2009 National Retail Forum has been a collaborative process and I'd like to thank my advisory group and industry connections for their support and guidance, as well as our conference partners and supporters listed below.

I hope you find the next two days engaging, thought provoking and a source of new ideas, and we look forward to seeing you at the next National Retail Forum, which will be held in Sydney between 20 and 21 September 2010.

## Anne Kaiser

Conference Manager

### Conference Partners



### Media Partner



### Print Media Partner



### Conference Information

To assist with the smooth running of proceedings over the next two days, please note the following:

**Badges** - To assist with security and conference management, delegates are requested to wear badges at all times; badges will be scanned at the commencement of each session.

**Presentations** - Selected presentations will be available for download via the NRF website by delegates after the conclusion of the conference, you will be advised of relevant passwords to access materials.

**Conference evaluation** - A conference evaluation form is included in your compendium; your feedback is important to us, please take the time to complete and return your evaluation to the Registration desk in the Level 2 Foyer.

**Catering** - Morning and Afternoon refreshments will be served in the Level 2 Foyer [outside the Auditorium]. Lunch will be served in the designated area at the rear of Retail Expo on both days, staff will be available to direct you each day.

**Mobile phones** - To avoid interrupting presentations, delegates are requested to either switch their mobile phones off or to silent during sessions.

**Personal belongings** - A coat rack has been provided for delegates; however we regret that neither the Organisers nor the venue can be held responsible for any loss or damage to items.

**Smoking** - Smoking is not permitted in the MCEC building.

#### Emergency procedures

**Evacuation** - In the event of an evacuation siren (whoop whoop whoop), please follow the direction of staff/venue wardens to the nearest emergency exit (green and white illuminated signs); the evacuation point is outside the Tea House building (Cnr Clarendon and Normanby Roads).

**Fire** - Please notify a member of staff immediately and leave the area as quickly as possible; lifts are not to be used in the event of fire.

**Medical** - Please contact a member of staff immediately.

# Session Details: Tuesday 11 August

**08.30 – 08.35** - Auditorium

## Welcome

*Stephen Ogden Barnes, Program Director,  
Australian Centre for Retail Studies*

**08.35 – 09.00** - Auditorium

## Introduction

*Russell Zimmerman, Executive Director,  
Australian Retailers' Association*

**09.00 – 09.30** - Auditorium

## Official opening

*The Rg Hon the Lord Mayor Robert Doyle*



## Keynote Address

**09.30 – 10.15** - Auditorium

## Competitive retailing in the current economic environment

*Graeme Samuel, Chairman, Australian Competition  
and Consumer Commission*

ACCC Chairman Graeme Samuel will discuss some key issues facing retailers in the current economic environment, in both business-to-business and business-to-consumer dealings as well as some insights into agreements with major landlords and shopping centres, the impact of unit and component pricing, and the ACCC's attitude to mergers in the sector.



**10.15 - 10.30 Morning Break** - Foyer

## Keynote Address

**10.30 - 11.15** - Auditorium

## Addressing, leveraging and optimising the economic downturn

*Ruby Anik, Senior VP and Director Brand Marketing, JCPenney*

Ruby will share current strategies on launching private label brands, managing multichannel relationships and innovating new CRM programmes, with particular focus on addressing, leveraging and optimising opportunities during the economic downturn.



# Session Details: Tuesday 11 August

**11.15 - 12.00** - Auditorium

## **Sustainability or disposability?**

*Steve Kulmar, Managing Director, Retail Oasis*

The consumer is reframing their behaviour from the heady carefree consumption of the last 15 years to a more careful and considered consumption as we move forward into the challenging and ever changing years ahead. So what's going to happen to our disposable mindset?



**11.15 - 12.00** - Meeting Rooms 2 & 3

## **Cost reduction and working capital management**

*Andrew Powell, Director Client Consulting, Deloitte Touche Tohmatsu*

The recession is deepening and economic uncertainty continues to drive exchange rate fluctuations and increases in the cost of supply inputs. Andy will present a framework for assessing the correct balance of cost management approaches, based on a retailer's current performance and choosing from five key cost reduction "levers".



**12.00 - 12.30** - Auditorium

## **What are your customers thinking?**

### **The August 2009 ACRS Consumer Confidence Study**

*Dr Sean Sands, Research Fellow, Australian Centre for Retail Studies*  
*Simon Burrett, Managing Partner, The Foundry*

Gain insight into the latest consumer sentiment with an overview of the past 4 quarterly ACRS Consumer Confidence Studies. Since its inception in 2008,, the study has interviewed over 4000 consumers across all states (metropolitan and regional areas) to determine trends in areas such as spending patterns, shopping habits, debt and expenditure levels and overall confidence in the economy.



**12.00 - 12.30** - Meeting Rooms 2 & 3

## **Panel: The changing face of retail advertising**

*Chair: Stephen Ogden Barnes, Program Director, Australian Centre for Retail Studies*

*Panellists include:*

- *Belinda Rowe, Chief Executive Officer, Zenith Optimedia*
- *Jon Bird, Chief Executive Officer, Ideaworks*
- *Adam Joseph, Marketing Insights Manager, Herald Sun*
- *Morris Mielowski, Business Futurist*

Our panel of specialists will discuss some of the trends emerging in the field of advertising, whether communication congestion will bring about a change in tactics, what lies ahead for more traditional media, and the most effective way to continue to generate cut-through for your message.

# Session Details: Tuesday 11 August

**12.30-13.45 Lunch Break** - Retail Expo Floor, Halls 1 – 5

**13.45 – 14.15** - Auditorium

## **Best of Retail Ads 2009**

*Russel Howcroft, National CEO, George Patterson Y&R*

Russel will review some of the best local and international retail TVCs from the last year, focussing on impact, effectiveness and emerging trends in the current economic climate.



**14.15 – 15.00** - Auditorium

## **A case study on people and culture, in a franchise environment to optimise performance**

*Warren Wilmot, Chief Executive Officer, 7 Eleven Australia*

Periods of economic uncertainty sharpen most organisations interest in improved performance and productivity, from the key asset of its workforce. Warren will share some of the processes and how 7-Eleven nurtures, measures and activates these processes at all times- not just when the economy gets tough.



**15.00 – 15.45** - Auditorium

## **The art and science of business**

*Shane Hills, Managing Director, Koko Black*

Thomas Edison was known as the world's best scientist. He was also known as the world's worst businessman! Shane will share his experience in building and evolving Koko Black's business over the past five years and discuss the role of business balancing both art and science as he seeks to build a company differentiated by quality.



**15.00 – 15.45** - Meeting Rooms 2 & 3

## **Know your shoppers better!**

*Ross McDonald, Industry Marketing Manager - Retail, Google Australia*

Using the latest research and thinking from Google's retail experts, Ross McDonald will share insights into Australian shoppers online, and discuss the future of online for retailers in this country. Learn how you can benefit from their online research with your existing business.



**15.45 – 16.00 Afternoon Break** - Foyer

# Session Details: Tuesday 11 August

**16.00 – 16.30** - Auditorium

## **Common-sense digital marketing for retailers**

*Tony Burrett, Digital Strategist, The Foundry*

Find out about the future of digital retailing, the latest developments in technology, why mobile will be the key marketing channel within the next two years, and how you can turn online researchers into in-store buyers. Learn smart and effective ways to diversify your communications strategy and look at how digital will play a vital role in connecting with consumers.

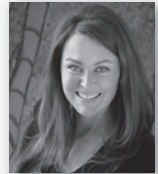


**16.00 – 16.30** - Meeting Rooms 2 & 3

## **Understanding women = better sales**

*Bec Brideson, Creative Director, Venus Advertising*

The number of women in retail businesses is at an all time high, as is the massive influence women wield, over all household consumer purchases and discretionary spending. Bec gives her perspective on marketing through the female life stages, and consumer behaviour before and after the digital age.



**16.30 – 17.15** - Auditorium

## **How to profit from a rapidly changing retail property market**

*Stephen Spring, Director, Australian Retail Leasing*

The balance of power is slowly shifting to retailers as once powerful shopping centre landlords fall on tough times. Steve's presentation focuses on the good, bad and ugly of retail leasing in an environment where a poor property strategy can bankrupt a retailer, but also where good leasing decisions can set the foundation for a new wave of super chains.



**16.30 – 17.15** - Meeting Rooms 2 & 3

## **Panel: Developing and managing unique precinct and strip developments\***

*Chair: Stephen Ogden Barnes, Program Director, Australian Centre for Retail Studies*

*Panellists:*

- *Kate Alder, Retail Strategist, City of Melbourne*
- *Roger Nelson, Principal, NH Architecture*

The panel will discuss the importance and role of marketing, design, retail mix and creating culture and community in various retail environments in the Melbourne city area, and look at what has worked, what hasn't, and why.

\*This session is supplemented by two exclusive guided tours around the heart of Melbourne's lanes and precincts, focussing on providing examples of successful design, retail mix and achieving cultural differentiation.

# Session Details: Wednesday 12 August

**08.30 – 08.35** - Auditorium

## Welcome

*Stephen Ogden Barnes, Program Director,  
Australian Centre for Retail Studies*

## Keynote Address

**08.35 – 09.20** - Auditorium

### **Let's build a Smarter Planet: Exploring smarter solutions for Retail**

*Jill Puleri, Global Industry Leader – Retail, IBM Global Business Services*

In the face of a radically transformed economy, retailers are under pressure to retain and build customer loyalty while at the same time cutting costs and streamlining operations. Jill will outline why there is a need for change, how smarter solutions for retail are possible as the world becomes more instrumented, interconnected, and intelligent, and provide some case examples where smarter thinking is leading to more profitable results.



## Keynote Address

**09.20 – 10.05** - Auditorium

### **The revitalisation of MYER**

*Bernie Brookes, Managing Director, MYER*

MYER department stores were carved out of the Coles Myer conglomerate in June 2006. Hear how the engineering took place, the cultural imperatives that were imposed and the financial progress of one of Australia's iconic businesses.



**10.05 – 10.30 Morning Break** - Foyer

## Keynote Address

**10.30 – 11.15** - Auditorium

### **Economic outlook - what next for the retail sector?**

*Alan Oster, Group Chief Economist, National Australia Bank*

In a year of significant market and economic volatility, Alan will provide insight into the latest economic forecasts and consumer sentiment, and discuss the implications for the Australian retail sector.



# Session Details: Wednesday 12 August

**11.15 – 12.00** - Auditorium

## **Greentailing in a down economy and other big retail trends**

*Robert Kinkade, Partner, McMillan/Doolittle*

Consumer behaviour towards sustainability and the green movement has gained significant momentum in recent years. Robert will review research on consumer attitudes and behaviour towards Greentailing, including key findings on what consumers would like from retailers and the retail industry.



**11.15 – 12.00** - Meeting Rooms 2 & 3

## **Panel: Developments and opportunities with RFID**

*Chair: David Sanders, Director, RFID Association of Australia/*

*Managing Director, Bestrane Group*

*Panellists include:*

- *Julien Marchand, Wireless Asset Tracking Technical Sales Specialist, Telstra Retail*
- *Marcella Larsen, Senior Product Manager, Microsoft*
- *Geoff Ramadan, Managing Director, UMD*
- *Phil Kenny, Managing Director, Bryn Systems*

RFID technology has the potential to revolutionise inventory management, data transfer/ management, stock visibility and security, improving value and effectiveness across the supply chain. This session will discuss the latest overseas trends, technology, range of applications and areas that have seen direct impact from RFID using an interactive panel style discussion with a team of industry practitioners from organisations such as Microsoft, RFID Association of Australia and key retailers who are actively utilising RFID technology in their day to day operations.

**11.15 – 14.45** (including lunch) - Meet in Auditorium Foyer

## **Melbourne City Precinct Tour**

Take the opportunity to experience a small group tour of some of Melbourne's most successful inner city retail spaces, providing insight into the unique blend of commercial, cultural and creative aspects that make each sector so very different. Including lunch, a glass of wine and the opportunity for discussion, the tour will be hosted by retailers and retail specialists to help you understand the key success factors in creating a successful retail environment, developing a unique identity and how to adapt elements to suit your own retail requirements.



**CITY OF MELBOURNE**

***Bookings essential - contact Registration desk***

# Session Details: Wednesday 12 August

**12.00 – 12.45** - Auditorium

## **Food fight brewing: Brands vs private labels (and what to do about it)**

*Nicole Marquardt, Senior Client Services Director, Research International*

There may be a recession on, but we've still got to eat... so what are consumers putting into their grocery shopping carts right now? Nicole will talk about the rise of the supermarket "own brand" and discuss how marketers can protect their brands against the onslaught of private label products in these recessionary times.



**12.45 – 14.00 Lunch Break** - Retail Expo Floor, Halls 1 – 5

**14.00 – 14.45** - Auditorium

## **Creating a world less ordinary: Developing the new Sony Centre**

*Toby Barbour, Deputy General Manager, Consumer Products Marketing, Sony Australia*

A case study on the processes and benefits of a comprehensive approach to retail design for the new Sony Centre stores is presented. The result is a store concept designed around the consumers who are attracted to and enjoy an engaging and stimulating retail experience.

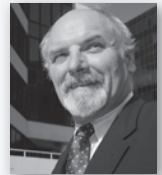


**14.00 – 14.45** - Meeting Rooms 2 & 3

## **Business insights gained over the last 43 years**

*Keith Lane, Chief Executive Officer, Leading Edge Group*

As one of Australia's largest retail entities, Leading Edge Group has consolidated and evolved without sacrificing its unique identity, business style or culture. Join Keith for a unique insight into the Leading Edge business model, how they are managing to achieve growth during the current economic climate and his experiences over the last 43 years.



**14.45 – 15.30** - Auditorium

## **GEC: Global Economic Crisis or Gaining Employee Commitment - The ultimate challenge for retailers**

*Martin Nally, Managing Director, HR Anywhere*

The session focuses upon the challenges faced by retailers in maintaining employee engagement and commitment during turbulent economic times.



# Session Details: Wednesday 12 August

**14.45 – 15.30** - Meeting Rooms 2 & 3

**Panel: Managing and developing loyalty from your database**

*Chair: Simon Burrett, Managing Partner, The Foundry*

*Panellists include:*

- *Professor Steve Worthington, Monash University*
- *Malcolm Martyn, Group Account Director, Salmat Direct HQ*

Our panel will look at the latest trends in loyalty cards, how communication is evolving and the benefits that can be achieved by getting the right information from your clients, and understanding how to use it.

**15.30 – 15.45 - Afternoon Break** - Foyer

**15.45 – 16.30** - Auditorium

**MYER: Balancing history, community and commercial reality**

*Megan Foster, Director Store Concepts & Design, MYER*

*Roger Nelson, Principal, NH Architecture*

With the dual brief of revitalising an historic building in the heart of Melbourne, as well as an iconic Australian brand, the process of designing and creating a world class retail offering has had its challenges.

Megan and Roger will share some of the key strategies of the development, and how the overall design, form and flow will reflect MYER's positioning, brand and service offerings.



**15.45 – 16.30** - Meeting Rooms 2 & 3

**Proactively managing ethical sourcing**

*James Horsfield, Managing Director, Qualspec*

This session will discuss options for ethical sourcing, including the one size fits all approach, what can be done to ensure that your ethical sourcing policy is being adhered to, and pitfalls to avoid when implementing an audit programme.



# Sponsors

## Conference Partners



THE AUSTRALIAN CENTRE FOR  
RETAIL STUDIES



Media Partner

Print Media Partner



This event is part of





# SECURITY 2009 CONFERENCE

## BUILDING STRENGTH & AGILITY IN SECURITY

Hear from local & international security experts including

➤ **The Hon Robert McLelland**  
(Federal Attorney General)



➤ **Dr Bernard Salt**  
(Futurist & Social Commentator)



➤ **Professor Henry Pontell**  
(Professor of Criminology, University of California - US)



➤ **Professor Martin Gill**  
(Director, Perpetuity Research & Consultancy International - UK)



In addition two half-day Executive Briefings will be held on Wednesday 26 August. **Planning the Future of Security** and **Catching the Enemy Within** will provide a unique opportunity to discuss issues with your peers in an interactive environment.

For more information visit [www.security2009.com.au](http://www.security2009.com.au)



Endorsed By

Exclusive  
Conference  
Sponsor

Lead Gala  
Dinner Sponsor

Exclusive Cocktail  
Reception Sponsor



**Security 2009**  
CONFERENCE & EXHIBITION

**24 - 26 AUGUST 2009**

SYDNEY CONVENTION & EXHIBITION CENTRE