

SUNBURY **B.E.A.R**

BUSINESS EXPANSION AND RETENTION

Working together to help our businesses grow!
#lovesunbury #shoplocal

MAY 2018

REPORT



SUPPORTED BY:
**SUNBURY BUSINESS
ASSOCIATION**

**SUNBURY COMMUNITY
HEALTH**



**"You may never know what results come of your actions,
but if you do nothing, there will be no results."**

— Mahatma Gandhi

Background

In response to concerns about the number of businesses closing and shop fronts remaining untenanted in Evans St, a small number of traders invited Peter Kenyon to attend an informal think tank in Sunbury. The Sunbury Business Association invited him to be a guest speaker at their annual dinner in May 2017. Peter is the Founder and Director of 'Bank of I.D.E.A.S.' who has been described as a social capitalist and community enthusiast. His focus is on seeking to facilitate fresh and creative ways that stimulate community and local economic renewal.

During this conversation Peter presented the Business Expansion And Retention (B.E.A.R.) Program. Representatives of the Sunbury Business Association (SBA), Sunbury Community Health (SCH), Hume City Council (HCC) and a number of individual traders established the B.E.A.R. Taskforce to discuss the revitalisation and reactivation of Evans Street, a major shopping strip located in the centre of Sunbury. It was agreed that the B.E.A.R. program would be a suitable way of engaging our local businesses and finding a way to move forward.

What is the B.E.A.R. program?

In a nutshell, the B.E.A.R. program is an action orientated and community based approach to economic development. It is a community sponsored initiative which involves the formation of a local taskforce and use of a structured interview process by community volunteers to learn about the needs, concerns and ideas of local businesses. The suggestions and issues raised provide the basis for action to address immediate business requests and concerns as well as the development and implementation of community economic development action plans. The B.E.A.R. Program is a planning process for setting priorities for B.E.A.R. actions.

The B.E.A.R. Program is designed to engage and work with both the community, retail and businesses of Sunbury to develop a plan to meet this challenge and create a healthier and stronger local business environment, long into the future.

“Sustainable community, economic and employment development does not result from a quick fix. The B.E.A.R Program is based on the simple premise that each community has within itself, or within its grasp, capacity and opportunities to influence it’s social, economic and employment future.” B.E.A.R. Program Manual 2014

Methodology

The findings of this report and subsequent recommendations are informed by the structured B.E.A.R. Survey Questionnaire and a mystery shopper report conducted in Sunbury. This section largely focusses on the methodology utilised in the conducting of the B.E.A.R. Survey.

Scope

Whilst initial discussions conducted by the Taskforce focussed on the economic development needs of the Evans Street precinct, the Taskforce recognised the interdependence of traders located in neighbouring areas and therefore included businesses within what is generally recognised as the central trading area of Sunbury. This placed businesses operating within the Target shopping centre precinct, Sunbury Square, O'Shanassy Street, Brook Street and Evans Street within the scope of investigation. Initially 91 businesses within the scope of the project were identified and basic contact details were collated by the Taskforce.

Roles and Responsibilities

The B.E.A.R. Project in Sunbury brought together a number of key actors, each with definable roles and responsibilities. The local B.E.A.R. Taskforce, comprising of representatives of local business, Sunbury Business Association / Sunbury Women in Business (SBA/SWiB), Sunbury Community Health and Hume City Council, provided guidance in the implementation and contextualisation of the B.E.A.R. project in Sunbury. Hume City Council also commissioned a Mystery Shopper program in late 2017. (See Appendix A). Peter Kenyon provided additional guidance as an advisor to the local B.E.A.R. Taskforce and as a trainer of the volunteers. Sunbury Community Health provided backbone support in the form of resourcing of the B.E.A.R. project, coordination of volunteers, collating information collected from interviewed businesses and developing the drafts of this report.

Community and Business Engagement

The Taskforce utilised a range of strategies to engage the community and business with the B.E.A.R. Project including:

- A launch event for local businesses and other interested parties which included guest speaker Peter Kenyon. This event attracted representatives from over 25 local businesses.
- Distribution of fliers and mail outs to businesses inviting participation in the B.E.A.R. Project.
- Recruitment and training of volunteers from within the community to conduct the B.E.A.R. survey interviews.

The Survey

The B.E.A.R. interviews were scheduled to take place during September and October 2017, however some of these interviews were conducted in February and March 2018. This alteration to timeframes took into account the low number of initial returns, and business and volunteer feedback that making time for interviews in the pre-Christmas period posed some challenges.

The survey contained 38 questions, comprising of a mix of multiple choice and free text responses and was intended to be undertaken by volunteers interviewing local businesses in pairs, utilising the contextualised survey questionnaire. The survey was based on the B.E.A.R. survey questionnaire tool and tailored by the taskforce.

With a low number of returns continuing to be an issue, in a number of instances interviews were conducted by an employee of Sunbury Community Health (n=5). Additionally some interviews were conducted by sole volunteers rather than in pairs, as originally envisioned.

Initially 91 businesses were identified within the geographic scope. The businesses identified received written material informing them of the B.E.A.R. project, offering them an opt out option. A total of 2 businesses declined to participate at this time.

Subsequently 60 of the identified businesses within scope of the project were allocated to interviewers.

Of the 60 identified businesses allocated to interviewers:

- Thirteen businesses formally declined to be interviewed. The reasons for these businesses declining to participate were not formally recorded.
- A further 33 allocated business interviews were not completed due to either volunteer withdrawal from the project, or businesses not providing an appointment time for volunteers to complete the questionnaire.
- A total of eighteen B.E.A.R. survey questionnaires were completed. Of the eighteen businesses who participated in the survey:
 - Seventeen were locally owned and the remaining interviewed business was a branch outlet for a national company.
 - Seven were clothing or fresh food retail businesses; six were cafes or fast food outlets; three were health-related businesses; with remainder being real estate and banking services.

Limitations

The low number of respondents to the survey has resulted in a small sample size, comprising just under 20% of the 91 identified business within the scoped area.

The Retail Dilemma

“Over the past 15 years there has been a seismic shift in retail and the customers retailers serve, the customers are now in the driver’s seat and they crave authenticity, newness, convenience, excellent service and creativity. The customer is increasingly looking for “experience not just stuff” and doing this at any hour of the day and through multi -channel platforms... The B.E.A.R Program is designed to engage and work with both community and retailers of Sunbury to develop a plan to meet this challenge and create a healthier and stronger local business environment into the future.”

(Excerpt from ‘Mystery Shopper Report’, Hume City Council, 2017)

WHAT WE KNOW ABOUT... BUSINESS IN SUNBURY

(DATA SOURCE B.E.A.R. SURVEY 2017/18)

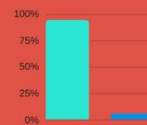
EACH BUSINESS SURVEYED EMPLOYED ON AVERAGE 10 PEOPLE:

125 female
55 male



75 full time
50 part time
55 casual or
contractor

94.4% of traders surveyed rated their
outlook over the next 12 months as
good to very good.



The majority of businesses
surveyed see what they are
doing as exceptional quality and
unique in the market.

2 out of every 3 traders
surveyed had been in
business for 6 years or
more.



78% of businesses surveyed indicated they are members of
SBA and/or SWiB.

Membership was seen as having benefits that included...



Information &
thinking



Networking



Events



Representation

The survey identified some strengths & some challenges...

Strengths



Customer loyalty



Convenience of
living and working
locally

Challenges

Availability of
finance



Availability of
parking



Survey Respondents – A Brief Profile

The data collected through the B.E.A.R. project survey questionnaire and Hume City Council's Mystery Shopper Report demonstrated that...

1. In the face of challenges, businesses remain positive and proactive. The majority see what they are doing as exceptional quality and unique in the market (Q7) and 94.4% rated their outlook over the next 12 months as good to very good (Q13).
2. The Report also draws on Hume City Council's 'Mystery Shopper Report' (2017). Two thirds of businesses have been trading for at least six years. The businesses employ 180 people: 75 full-time, 50 part-time and 55 casual or contractor (125 female and 55 male). The majority do not anticipate employing more staff in the current environment, while none indicated they are considering decreased staffing levels.
3. In relation to membership of the Sunbury Business Association (SBA) and/or Sunbury Women in Business group (SWiB), fourteen of the eighteen businesses surveyed indicated they are members of the SBA, SWiB or both. Involvement with SBA / SWiB and access to information, networking, representation to Council, thinking and events, was considered a value-add for these businesses.

Findings and Recommendations

The analysis stage in the B.E.A.R. manual (2014) provides an outline of suggested themes to analyse the information provided by businesses. These themes have been provided as a guide for further discussion and recommendations on actions for the short, medium and long term.

This report provides not only a way forward for the B.E.A.R. Taskforce, but a way that can formulate an action plan based on businesses (together) doing it for themselves.

‘There is nothing so powerful in all the world as an idea whose time has come’

(Victor Hugo)

Theme 1: Business Growth Strategies – Findings

The businesses interviewed indicated that most of their customers come from Sunbury, with smaller numbers drawn from surrounding areas. Very few indicated online sales to other parts of Victoria and interstate (Q10).

‘Small size of local market’, ‘not enough customers’, ‘uncertainty of customer loyalty’ and ‘small catchment area’ were also widely cited as major constraints to expansion (Qs13,14). High rent was identified as both a disadvantage and a constraint. Many respondents indicated, for the reasons identified above, that they have contemplated closing, selling or moving their businesses.

Respondents acknowledge that some aspects of their businesses are suffering that could be otherwise critical to their success (Qs 27-35). For example, 72.2% of respondents indicated they don’t have a written marketing strategy. 72.2% have a website though not all update it regularly. Most have a social media presence but feel it needs more attention than they can give. 55.5% of the businesses currently sell online. The business owners give the impression that, while they know the importance of visual merchandising, social media, online sales, business and marketing planning, prioritising these aspects is difficult, as they manage the bricks and mortar realities of meeting costs and remaining viable.

The mystery shopper report supports these findings, indicating room for improvement in the key areas of: customer service, store appearance and merchandising. The report also found that customer service is strained and focused more at the checkout.

Most businesses would welcome offers of assistance (Q18). They consider ‘social media’, ‘marketing your business’, ‘greater community support’ and ‘cash flow’ to be most useful in helping their business improve performance over the next 12 months. ‘Digital strategy’, ‘employing and keeping the right staff’, ‘new products’ and ‘visual merchandising’ were also identified. Most of the businesses would appreciate information with the most frequently selected topics being ‘general marketing strategies’ and ‘online marketing’ and ‘business funding programs’

Recommendation 1

That the SBA facilitates and leads a dialogue with land owners and real estate companies to look at the rent situation.

“Rents in Sunbury are reportedly higher than Keilor Rd” Survey respondent

Recommendation 2

That the SBA facilitate a series of business strategies / workshops focused on the areas identified below:

- ***Digital marketing strategy (website and social media)***
- ***Visual merchandising***
- ***Quality and outstanding customer service***

Recommendation 3

That the SBA publicly recognise and celebrates good collaboration between local businesses.

"Collaboration not competition was a commonly used phrase by respondents. Wouldn't it be great to see Sunbury roasted coffee beans among Melbourne's most popular blends? How could all Sunbury coffee producers work together towards getting a little bit of Sunbury in every cup of coffee enjoyed in the coffee capital of the world? Then... world domination?"

'70% of all investment in a region is driven by the businesses indigenous to the region. Therefore, a region's number one lever for encouraging growth is its existing people and businesses'

(McKinsey and Company, Lead local, Compete Global, 1994)

Theme 2: New Business Opportunities – Findings

83% of respondents identified 'local customer loyalty' as one of the main advantages of running a business in Sunbury. While they highly regard local customers, this reliance on loyal and local is also understood to be a risk (Qs12). Uncertainty regarding how loyal their customers are, combined with the small size and slow growth of the local market / catchment is a commonly raised concern. This is consistent with the shift in retail that has occurred whereby customers often opt for convenience and competitive prices over loyalty.

Many of the respondents to the B.E.A.R. survey reported seeing value in supporting other local businesses and a number of respondents proposed a range of shop local initiatives including:

- Initiatives supporting/promoting local businesses supporting other local businesses
- Initiatives supporting/promoting local community buying local
- Collaborations between shops / cross-promotional initiatives
- Encouraging the use of common hashtags across social media platforms, associated with shopping locally e.g. #Sunbury, #Sunburyeats, #EvansSt, #TGIF, #Macslounge, #lovesunbury
- Mutually supported campaign based activities e.g. "Chapel St quality at Sunbury prices"

Recommendation 4

That the SBA advocate for a greater variety of businesses within Sunbury including larger chain stores.

Recommendation 5

Encourage local businesses to informally mentor newer business owners by like-minded, more established business owners.

Recommendation 6

That the businesses interested, lead the establishment of a 'shop small / local' program.

Recommendation 7

That the businesses interested lead a series of local events coinciding with main shopping events (Christmas, Mother's Day, Easter, etc).

Recommendation 8

That the SBA consider the establishment of a specific and focused Marketing Business Coordinator to support local events and programs.

"Many businesses see value in supporting each other. What about... exchanging invaluable lived experience and knowledge for some fresh ideas, over a Friday arvo frothy (at a local venue of course)!"

Theme 3: Labour Market Developments

Quality and supply of local labour (33.3%) were also identified by respondents as an issue however they identified that if they were to employ new staff the following skills were ranked highly: 'social media', 'customer service', 'interpersonal' and 'public relations'.

Recommendation 9

That the SBA continue to engage and involve local labour hire agencies / organisations as members of SBA / SWIB.

Theme 4: Community Infrastructure Development Issues - Findings

Poor car parking was identified as the main disadvantages of doing business in Sunbury. Parking has long been raised as a problem by businesses and the community. It is a multi-faceted issue. An inadequate supply of all day car parks for workers means they have to spend time moving their cars during shifts. 1-hour street parking is considered to be a deterrent for shoppers who may otherwise spend longer on their shopping experience.

Recommendation 10

That the SBA continues to advocate on behalf of business and ensure adequate representation regarding Local Area Traffic Management Planning.

Recommendation 11

That Businesses and community consider a campaign to identify parking within walking distance eg #nottoofar

Recommendation 12

That SBA investigates how other destination shopping strips e.g. Maling Rd, Chapel Street and others ensure parking isn't a deterrent.

"There is also said to be a local mindset that if people can't park out the front of the shop they want to go to, they will keep driving and go to a shopping centre with better parking, e.g. Highpoint or Watergardens."

'Big things happen when lots of people do small things differently' (John Theobald)

'When spider webs unite they can tie up a lion' (Ethiopian proverb)

Theme 5: Economic Development Leadership

Lack of support by Council was also often cited as a disadvantage. Hume City Council was identified as the level of government that almost half the respondents are experiencing problems with. Store holders perceive that if they have to approach Council regarding changing or expanding their business, it will be an ambiguous and lengthy process. They know that with every improvement to street scapes will come significant inconvenience for them and shoppers alike and inevitably, an increase in rent. Respondents reported that "rates continue to rise, while sales remain up and down." Respondents also reported that slow, bureaucratic approval and licensing processes are seen to be holding businesses back from expansion and the community from holding its own events. Evans Street upgrades, including drainage and lighting were raised. Poor communication with store holders with regards to street works was also identified.

A continued strong and direct relationship between Hume City Council and local businesses, supported by both SBA and SWiB, remains of utmost importance. Historically, a part-time Sunbury Place Manager was located within Hume City Council's Economic Development Team. Across Hume, big businesses including manufacturing and transport and logistics, attract much-needed economic development support. In contrast, Sunbury's economy relies heavily on retail and small business. It is also the part of Hume most likely to benefit from an increased focus on tourism. It also seems that respondents consider that Council and other stakeholders could take more of a role in harnessing Sunbury's tourism potential.

Recommendation 13

Using the B.E.A.R. themes, explore with Hume City Council Economic Development Department, how they would like to work with B.E.A.R. Taskforce and how they see their role and what resources are available to help shape a stronger Sunbury economy, for example the establishment of a Sunbury Tourism & Marketing Manager or Sunbury Place Manager.

Theme 6: Quality of Life Factors

Respondents indicated their quality of life in Sunbury (55.5%) and its positive image, (50%) as well the fact they live locally (61.1%), as main advantages of running a business in the community (Q11).

There were no recommendations formulated for this theme.

"I love where I work, shop and play"

Theme 7: Resources

Lack of available finance was cited as a key constraint to expansion of surveyed businesses. Respondents noted a plethora of industry group newsletters, information that businesses read or have access to.

Recommendation 14

Using local contacts in the banking industry, provide business mentoring / coaching to SBA members to ensure their investment is financially viable.

Recommendation 15

That the SBA cross promote opportunities available to local businesses via other networks.

"These businesses would in turn be generating further funds for the bank's community initiatives. Talk about win-win-win!"

"Sunbury businesses see themselves as and are unique! They prioritise quality, fair trade, home-made, locally sourced and locally made, Australian made, ethical, boutique, organic, healthy and the list goes on! Working together Sunbury could sell itself based on these qualities of its strip shops."

Further Action/Implementation

While the Survey and B.E.A.R. itself focus on how the business community can work together and with other stakeholders to strengthen the local economy, Sunbury's business community would benefit from a 'global-local' approach, with buy in from landowners, real estate agents, Council, business owners and the community. Input could also be sought from business coaches and business support organisations.

While there is a role to play by these stakeholders there may also be a range of the proposed actions that businesses can undertake themselves or in collaboration with other local business.

"While many of the things raised in the B.E.A.R interviews are bigger than the individual retail store and not in the immediate control of the retailer... It is up to the individual store to improve their individual instore experience and online presence which would in turn improve the shopping experience in Sunbury as a whole." (Excerpt from 'Mystery Shopper Report')

Concluding remarks

The successful establishment and implementation of a B.E.A.R. Program involves four recommended key stages: planning, visitation, analysis and community feedback and action. Importantly, it stimulates discussion and relationships within the business community. This report provides a range of recommendations based on structured discussions with local traders and a mystery shopping program. These recommendations have been developed with the best evidence available at this time.

"Window-dressing alone, no matter how good, won't fix many of the issues highlighted by the survey responses. With so much at stake, and so much beyond the control of store holders, identifying, prioritising and making the time to work on the factors that they can both control and that will most likely help them to succeed, is difficult."

Summary of Recommendations

Recommendation 1

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Recommendation 2

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That the SBA cross promote opportunities available to local businesses via other networks.

Further readings

<https://theconversation-com.cdn.ampproject.org/c/s/theconversation.com/amp/five-ways-to-save-britains-struggling-high-streets-90362>

[http://www.placemanagement.org/jpmd-10-\(4\)/](http://www.placemanagement.org/jpmd-10-(4)/)

<http://www.placemanagement.org/media/57742/HSUK2020-End-of-Project-Reportcompressed.pdf>

Appendices

Appendix A: Mystery Shopper Report

Appendix A: Mystery Shopper Report – Commissioned by Hume City Council

Background

Sunbury Community Health and the Sunbury Business Association in conjunction with Hume City council are undertaking a Business Expansion and Retention program (B.E.A.R) in the Sunbury Town Centre.

Over the past 15 years there has been a seismic shift in retail and the customers retailers serve, the customers are now in the driver's seat and they crave authenticity, newness, convenience, excellent service and creativity. The customer is increasingly looking for "experience not just stuff" and doing this at any hour of the day and through multi-channel platforms.

The B.E.A.R Program is designed to engage and work with both community and retailers of Sunbury to develop a plan to meet this challenge and create a healthier and stronger local business environment into the future.

This mystery shop program is an element of the B.E.A.R program to look at individual retailers and how the stores measured up in the areas of Store Appearance, Customer Service and Merchandising all basic elements to an individual store experience.

The stores retail stores shopped were in Brook Street, Evans Street, O'Shanassy Street, Sunbury Square and related arcades.

29 shops in total were mystery shopped.

Premises that were not included were:

- Banks, Real Estate Agents, Professional Services, medical Suites and Post Office
- Cafes and Restaurants were not part of this program, but as this is the biggest growth area it is an area that should be further explored.

Shoppers

The shoppers engaged were volunteers from the Craigieburn and Tullamarine areas who had not previously shopped in Sunbury.

Shoppers Brief

Dress casually and act as a normal shopper. Wait for the shop assistant to greet and approach you, after a reasonable amount of time approach them and ask for or about a specific item.

On entering the store look at the general cleanliness of the store windows, floors etc. Also observe the window display, the goods available and general merchandising of the store.

Weather

The weather was very warm on the shopping dates of 5, 8 & 17 December 2018.

Store Appearance and House Keeping

The questions below outlined what the shoppers were asked to observe, then rate on a scale of 1 to 5 one being needs improvement, 3 being good/average and 5 being excellent their experience.

1. Was the stores outside appearance attractive?

1. Needs Imp	2. 2.44	3. Good	4.	5. Excellent
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2. Was the window display inviting and attractive?

1. Needs Imp	2. 2.44	3. Good	4.	5. Excellent
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3. Did the outside appear to be clean – clean footpath, clean windows and doors etc.

1. Needs Imp	2. 2.31	3. Good	4.	5. Excellent
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4. Was the store's inside clean and attractive?

1. Needs Imp	2. 2.59	3. Good	4.	5. Excellent
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5. Was the store easy to shop and well organised?

1. Needs Imp	2.	3. 3.14 Good	4.	5. Excellent
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6. How did you feel about the overall appearance of the store?

1. Needs Imp	2. 2.79	3. Good	4.	5. Excellent
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The overall rating for Store Appearance was just under good at 2.6.

A number of the comments were consistent:

- Windows were dirty
- Floor was dirty or worn
- Little tired
- Dead insects and flies in the window
- Window displays disappointing
- Many stores did not use window displays to enhance their offering

On the positive side

- Many of the stores were easy to shop and quite well organised

Customer Service

The customer service questions below outlined what the shoppers were asked to observe, to follow up in engaging with the assistant, then rate the experience on a scale of 1 to 5 one being needs improvement, 3 being good/average and 5 being excellent.

1. Were you promptly greeted / acknowledged?

1. Needs Imp	2. 2.17	3. Good	4.	5. Excellent
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2. Was the greeting friendly & professional?

1. Needs Imp	2. 2.76	3. Good	4.	5. Excellent
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3. Did the retail assistant ask appropriate questions to find out what you were looking for?

1. Needs Imp	2. 2.27	3. Good	4.	5. Excellent
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4. Was the retail assistant knowledgeable about the merchandise?

1. Needs Imp	2. 2.86	3. Good	4.	5. Excellent
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5. What was your overall experience with the staff in the store?

1. Needs Imp	2. 2.48	3. Good	4.	5. Excellent
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The overall rating for the category of Customer Service was just below good at 2.43.

It should be noted that a small number of stores had many assistants positioned behind the counter who were assisting customers in paying for the goods. In most cases there was no greeting to the shopper when they entered the store.

A small number of stores had very good customers service, while they may not have greeted as the shopper entered once they spoke to them the assistants were friendly and professional. Knowledge of product in these stores was also very good.

In the majority of stores as you can see from the scores the service was below good/average.

Some of the comments were:

- There was no greeting
- Sometimes no acknowledgement of presence in the store
- Did not approach to ask if help was required
- Did not appear interested in my shopping needs
- If goods in question were not available did not suggest alternative
- Only one store recommended somewhere else in town to find the requested item

In 2003 a Mystery Shopping Exercise was conducted in Sunbury by the Australia Retail Services, the comment under Customer Service and Sales Skills is as follows

“The major area of weakness, across all categories is sales and service skills.

There appears to be a general attitude of waiting until the customer has chosen merchandise, bringing it to the counter and at that point there is some interaction. Prior to this, there is very little interaction.”

It would appear that 15 years later this is still a significant area that needs improvement.

Merchandise

The merchandise questions below were for the shopper to look at the store and look at the merchandise and see if it was inviting, if there was t good signage, did the store have a reasonable selection of merchandise and was it displayed well. The shoppers then rate the experience on a scale of 1 to 5 one being needs improvement, 3 being good/average and 5 being excellent.

1. How would you rate your first impression of the store?

1. Needs Imp	2. 2.58	3. Good	4.	5. Excellent
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2. Was the merchandise arranged in an orderly & neat manner?

1. Needs Imp	2. 2.97	3. Good	4.	5. Excellent
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3. Was the merchandise inviting, did you want to buy something?

1. Needs Imp	2. 2.67	3. Good	4.	5. Excellent
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4. Was the product priced and easy to read?

1. Needs Imp	2.	3. 3 Good	4.	5. Excellent
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5. What was your overall opinion of the merchandise selection?

1. Needs Imp	2. 2.9	3. Good	4.	5. Excellent
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The overall rating for Merchandise was just under good at 2.8.

Some of the comments made:

- Displays ordinary
- Tired looking store
- Hand written signs
- Some specialist items not priced
- Tired looking but friendly assistant offered to order in what requested
- Limited stock – given this was December this should not be the case

- Merchandised not grouped to enhance sales
- Not welcoming
- Lighting not sufficient

Website and Social Media

Websites

	Number	%
Total Websites	19	66%
Parent Company websites	9	31%
Online shopping capacity	5	17%
Active no online shopping	1	.034
Basic	4	14%
None or not active	10	34%

The stores that were in the mystery shop were looked at to see if they had a website, the capacity for online shopping, or if they had an active facebook page, other social media platforms such as Instagram, twitter and Pinterest were also examined.

As you can see from the figures while 66% of the businesses do have some level of website, however 31% of those who do have a website are on a generic parent company website, some of which have a page directed at the Sunbury store with little individual store information and some that only have a store indicator page.

There was only 6 stores that had a strong active website and of these 5 had good online shopping capability; the majority of these were in the clothing sector.

This still left 34% with no website and 14% with a very basic web presence.

Facebook

	Number	%
Total on FB	20	69%
Active	18	62%
None or not active	11	38%

The facebook outcome was a little more positive as 90% of those with a facebook page were active, some with a significant amount of followers. A number of businesses while not having a website or at least active website do have a much stronger facebook presence so do have a good online presence.

Unfortunately 38% of those mystery shopped did not have facebook or social media presence at all.

A small number of stores had and Instagram presence again it was those that had both a strong website and Facebook page, and again in the clothing sector. A smaller number of stores were on Pinterest.

However it should be noted that 38% of the stores did not have any significant online presence.

Conclusion

This mystery shop survey indicates that much of the shopping experience in Sunbury is average, from the appearance of the store to the selection of merchandise, the merchandising itself and the customer service offered.

While much of what is written in the retail press indicates that the bricks and mortar stores are here to stay, it also indicates that to be successful the retail offer has to include a reason to visit the physical shop. This includes an interesting in store experience, interesting merchandising and excellent customer service; these are the things that can clearly differentiate the bricks and mortar shopping experience from the online shopping experience.

The retail stores that are offering an average experience and are not offering any real reason for a customer to put down their electronic device, get off the couch and visit a physical store will struggle to succeed.

The retail sector has been disrupted by online developments and will never go back to the pre internet days. It has also been established that a large proportion of shoppers from millennials to baby boomers look online for the product and determine who carries that product and the competitive price for the product. If the store has no online presence either through a website or a social media platform it is invisible to a large section of the customer base.

While many of the things raised in the B.E.A.R interviews are bigger than the individual retail store and not in the immediate control of the retailer, everything mentioned within this survey is in the control of each and every one of the individual retailers. It is up to the individual store to improve their individual instore experience and online presence which would in turn improve the shopping experience in Sunbury as a whole

All the historic evidence indicates that significant community development only takes place when local community people are committed to investing themselves and their resources in the effort. That's why you can't develop communities from the top down, or from the outside in.'

(John McKnight, Jody Kretzmann, Mapping Community Capacity)