

INSIGHTS

STRATEGY

IMPLEMENTATION

Be the best shopping centre you can be.





Shopping Centre Excellence.

Retail Doctor Group is a consulting and advisory group to the retail and asset management industry whose core benefit is to provide growth strategies for its clients through an approach of Insights / Strategy / Implementation

INSIGHTS

Consumer Insights, Centre Analysis, Market Analysis, Competitor Analysis, Global Best Practice, Mystery Shopping

STRATEGY

Strategy Development, Strategic Positioning, Strategy Workshops, Customer Experience Strategy, Retail Strategy Advisory

IMPLEMENTATION

Retailer Training, Centre Management Training, Keynote Presentations, Centre Marketing and Brand Planning, Asset Differentiation Planning, Precinct Planning, Visual Merchandising Audit

Retailer Improvement Programs:

- Fit for Business™
- Fitness Action
- Fit for Growth™

Shopping Centre Insights

We know where to look to find the real opportunities for your business

Discovery

Centre Analysis

Customer Insights

Global Best Practice

Competitor Analysis

Market & Economic Analysis

Diagnose

Development of Positioning Strategy

Prescribe

Results of these insights will then provide direction for:

- Retail asset strategy development and direction
- Asset treatment and capital focus
- Deployment priorities if applicable
- Omnichannel strategy & all customer touch points
- Retailer tenancy mix
- Refinement of marketing plan, event schedule and spend

Insights Informing Strategy

Questions We Typically Answer

Who is your target market? What are your customers' needs? Who could you target that is currently not a core demographic? What is their spend? Their shopping frequencies?

How does your centre appeal to your target? What are their motivations and purchase drivers? And their barriers to shopping? What is customer perception of your centre?

What don't you know about your current and future customers? What is customer opinion on your competitors? What marketing channels and approaches appeal?

What retail mix and categories suit this positioning?
What is their interaction with your centre and the amenities on offer?

These insights will then feed into the strategic direction for each centre and help decide which asset is worthy of investment, divestment and at what level is critical.

We can weight each asset within the portfolio based on:

- Insights gained
- Competitive differentiation present & future
- Best use of capital
- Best suitability to portfolio goals

Building on operational steps such as:

- Retailer mix
- Events
- Marketing
- Customised Retailer Training



Why Shopping Centre Insights?

- Validate (or otherwise) current asset strategy planning and capital expenditure
- Independent expert perspective
- Fully-realised profiles of core customer types to underpin strategy, tenancy mix, maximising retailer performance, category design, future asset marketing and expenditure funds
- True present and future customer target analysis and 'voice of the customer' influencing strategy
- Accurate customer segmentation analysis (wants, desires and behaviours) to build a more segmented and focused marketing plan
- Development of media activity and omnichannel strategy
- Refined brand cues that resonate with priority customer segments
- Guidelines for centre design and treatments for target customer pull
- Implementation plan where appropriate



“The wealth of industry experience that Retail Doctor Group delivers will always save valuable time and money when you are trying to inject real substance into your business plan to achieve long-term measurable success.”

— MIRVAC

Insights Products

Consumer Insights

Discover information on your centre's customers, including their habits and barriers. This includes your current consumer perceptions, the types of consumers most attracted to your offer, and the opportunities for growth in your category.

Areas for research include:

- Motivations and barriers for shopping at the centre
- Who are your current segments and who could be your target segments
- What is their spend and shopping frequencies
- Shopper profiles at an emotional and functional level
- Customers' shopping habits with your competitors – who are their alternatives and what are their shopping behaviours
- Identify optimum mix and offer
- Understand escape spend and opportunities to correct

Online Quantitative and Qualitative Research

Leverage online research with a representative panel of customers from the local area and utilise the centre's database to approach current customers to provide insight into current and future target customers.

Centre Analysis

- One day on site to view the centre
- Review data and centre performance against benchmarks
- Operational SWOT
- Review of tenant mix & service offerings
- Review of 'point of difference'
- Analysis of tenant performance

Global Best Practice

Receive insight into global shopping centre trends and best practice examples from our Ebelftoft partners around the world, highlighting:

- Treatments
- Formats
- Unique characteristics that could add value to your centre offer

Market Analysis

Evaluate the current demographics and trends in your catchment areas, including:

- Market trends in your segment
- Review your demographics against market trends
- Predicted market trends
- What is the dollar value?

Competitor Analysis

Analyse competitor intensity both present and future through a review of competitors in your catchment area, including:

- Their offering
- Point of difference (if any)
- Target market they seek to appeal to
- Travel elasticity of consumers,
- Retailer mix
- Gap analysis
- Branded offer
- Value adds

Mystery Shopping

Discover how fully 'effective people' can deliver an average of 20% increase in sales, customer service and profitability.

We work in partnership with you to tangibly increase service scores, as distinct from just reporting on them. The aim of our Mystery Shopping service is to assist in driving customer satisfaction and loyalty to produce increases in your core retail KPI's and drive improved sales and profitability.

Exit Interviews

Gain insight from face to face interviews with customers while they are in your centre. These questions will focus on their opinions of your centre and their reasons for shopping there.

Shopping Centre Strategy

Strategic
Development

Strategic
Positioning

Customer Experience
Strategy

Retail Strategy
Advisory

Our Strategy Options May Include:

- Review of the current brand proposition and differentiation
- Competitive marketplace considerations including composition, trends and opportunity analysis
- Review of category trends
- SWOT – understanding both context and learnings to date
- Omnichannel preparedness and capability in key ‘fitness’ dimensions
- Preparing your centre for growth and change
- Retail operations alignment to insights and strategy
- Effective people, culture, capability and alignment to strategy
- Operational benchmarks and performance measurement
- Future of Shopping Centres – strategic positioning
- Optimum precinct planning



Our work with asset managers form the guidelines for asset repositioning, precinct planning, retailer improvement programs, market and consumer research through to asset management strategic workshops.

Shopping Centre Implementation

Best Practice Retail Deployment

We work with shopping centres and retailers in partnership to drive sustainable future performance. Our shopping centre consulting and advisory programs provide independent retail expertise to chosen retailers which will assist them to improve their business performance including presentation, sales and operating profits.

We can also provide ad-hoc one-on-one advisory to you or your retailers. This is particularly valuable for us to discuss results of mystery shopping and visual merchandising audits with retailers or to provide one-on-one support following training.

Implementation Products for Centres



RetailDoctorGroup

Centre Management Training

Identify 'fit' retailers in your centres and, as importantly, 'unfit' retailers. Our Centre Management Training programs teach your team the essentials of retailing. We explain key retailing terms and concepts that are essential to effective communication between centre and retailer.



RetailDoctorGroup

Precinct Planning

Utilise insights to determine optimum tenant mix and location.



RetailDoctorGroup

Centre Marketing & Brand Planning

Define the brand execution required to support an optimal omnichannel marketing strategy based on insights gained.



RetailDoctorGroup

Visual Merchandising Audit

Have visibility over the visual merchandising standards throughout your centre. This audit is developed with your centre objectives in mind to assess the stores' compliance to a series of visual merchandising standards and expectations.



RetailDoctorGroup

Asset Differentiation Planning

Build a competitive and differentiated position for your centre.

Retailer Implementation

Retailer Improvement Programs at Your Centre

Our retailer improvement programs provide an overview analysis of each retailer's business using our proprietary Fit for Business™ modules, and equip your retailers with the tools to improve performance through tailored step-by-step implementation solutions.

Fit for Business™ Modules

Strategy Sensor

Strategy and operational alignment for growth

Brand Aid™

Articulating and communicating a point of difference consistently

Customer Connection

Customer profile and how to attract and keep loyal customers

Effective People

Assessing organisation structure and staff capability

Category Cardio™

Improving stock and category performance

Fiscal Physical™

Interpreting financials vs industry benchmarks

Visual impact

Store displays and experiences

Omni Channel Mix (Ecosystem)

Identify your ideal mix of channels to market

We have 3 levels of programs depending on the retailer's needs and end goal:



RetailDoctorGroup
Fitness Action

The Fitness Action program is a hands-on, in-store program focusing on up-skilling independent retailers in order to improve their business fitness.



RetailDoctorGroup
Fit for Business™

Comprehensive support for retailers who need it most. This program assesses the business's planning and goals, human resource and people structure, well as in-store execution.



RetailDoctorGroup
Fit for Growth™

Support for high potential retailers who are actively looking or are targeted for expansion into other Retail assets. This program plans the business structure as well as in store platforms for business model replication.

What does a Fit for Business™ program do for your retailer?

- The program identifies the gap(s) between current delivery and what is required best practice for a retailer
- It pinpoints the exact areas to help increase retail performance in sales, profitability and cash flow
- It is the foundation analysis for a retailer's performance against target and current national benchmarks
- It is an independent expert perspective and analysis on the business against best practice
- It outlines the gap(s) between current profitability, cash flow and benchmarks and the steps needed to close that gap
- Provides advice and priorities into the module framework with clear 'how-to step'
- Highly measurable solutions through the ongoing relationship

Remember: Happy tenant = Happy centre. That's the place I want to be!

Additional Services



One-on-one mentoring of retailers to facilitate greater retail understanding and performance.



Our training, workshops and keynote presentations are tailored to ensure original material and includes topical issues covering current retail and economic environments both domestic and global. Using real retail examples and success stories, we ensure audiences leave with key takeaways, valuable insights and implementable skills they can use to improve their own retail businesses.



Formats

- Keynote Presentations
- Retailer Workshop
- Retailer Training
- Retailer Category Specific Training

Topics Include

- The Steps to Business Fitness
- Global Retail Fitness Trends
- Retail Leadership & Management
- Retail Selling Skills
- Building a Retail Ecosystem
- Visual Merchandising
- Effective People
- Category Cardio
- Developing a Powerful Brand
- Promotional Planning
- Strategy Sensor
- Customer Connection
- Fiscal Physical

Why invest in retailer development?

The centre management outcomes include:

- A motivated, skilled group of retailers with much improved sales and sustainability.
- A better retail offer that will attract more customers to the centre.
- A better retail mix of stores that are sustainable and self sufficient.
- A more pro-active tenant set that generates more of its own traffic.
- An improved debtors list that sees retailers able to afford to pay on the due date.
- The ability to retain retailers and renegotiate new leases as and when they are due.
- An increased value of the asset.
- A summary report showing each retailer's overall rating and some insight into the likely outcomes of each retailer.
- An ongoing summary commentary on each retailer's progress (with privacy constraints).
- An idea of the likely future trading results by retailer.

Some of our asset management clients:



FORTIUS





Ebeltoft Group

International Retail Experts

www.ebeltoftgroup.com

Our Global Team

Bringing International Retail to Australia and Australian Retail to the World.

As the Australian elected member of Ebeltoft Group, we have more than 20 years of experience as retailers and consultants in all retail channels, segments and regions.

We use this expertise to provide innovative and pragmatic solutions, ranging from strategy, concept development and international expansion, to hands-on implementation.

Today, members of the Ebeltoft network advise 80 of the 100 largest retail companies in the world.



“Retail Doctor Group are subject matter experts and have a deep knowledge and understanding of the Retail Industry all the way from the high level strategic view right down to the tactical execution.”

“The wealth of industry experience that RDG delivers will always save valuable time and money when you are trying to inject real substance into your business plan to achieve long-term measurable success.”

Client testimonials

“We engaged RDG to help us identify our audience and also identify opportunities for growth marketing. We have found the customer Profiling Method to be more specific to emotional triggers for consumers and their purchase decisions, more so than traditional market research.”

“Post our market survey, the consumer insights report which was delivered by RDG has been received positively and has invigorated our brand development planning and serves as a practical lens to validate our engagement tactics and product development decisions.”

“The ROI on this methodology has been immediate and profound. This is fantastic for drilling into what really matters to your customer and understanding not only how, but most importantly why they interact with your brand.”

“We have a much clearer and more customer centric view into differentiating our offer as a result of RDG's work with our organisation.”



Retail Doctor Awards

Australian Enterprise Awards
Best Retail Advisory & Consultancy 2019

Vend
Top 50 Retail Influencers 2019

Asian Retail Congress
Top 100 Global Retail Minds 2019

LinkedIn
Top Voice for Retail 2018

Fit Small Business
Top Retail Influencer 2018

Vend
Top 50 Retail Influencers 2018

Asian Retail Congress
Top 100 Global Retail Minds 2018

NRA, Finalist
Outstanding Contribution to the Industry 2017

Asian Retail Congress
The International Retail Leadership Award

The Australian Institute of Management
National Scholarship



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