Regional Development Australia

YORKE AND MID NORTH

Customer Service Project

Clare Valley

2009-2010

SouthAustraliaWorks

linking people, skills and jobs

An Australian Government Initiative

Government of South Australia

Project coordinated by Alan Schwarz (Business Development Officer) and Midge Wallace (Workforce Development Officer) for the Mid North Regional Development Board (now known as Regional Development Australia Yorke and Mid North)

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Research co-ordinated by LT Associates

Research conducted between November and December 2009

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Background

The Clare Valley considers itself to be a premium wine district, with an accompanying hospitality and tourism industry that is of great importance to the prosperity of the district. There have been numerous discussions over many years about the importance of excellent customer service for the Valley to promote itself and be perceived as a premium tourism destination.

The need for continual improvement in business retail skills has long been recognised by the Mid North Regional Development Board (now known as Regional Development Australia Yorke and Mid North), which has worked to address this by providing recent business skills workshops focussing on Customer Service Skills, Cellar Door Sales Skills and Visual Merchandising Skills. A 'Retail Study of the Clare Valley 2009-10' was compiled by the Mid North Regional Development Board ('the Board') in conjunction with this project and is available at Appendix B.

It concludes that "there are many challenges facing regional retailers into the future. With improved transport infrastructure, regional retailers face the on-going threat of sales leakage to other larger regional centres and to capital cities..... However, the biggest challenge presented to existing Main Street retailers is on-line and internet ordering. On-line sales continue to impact traditional retailers as time-poor consumers become more comfortable with on-line transactions..... Retailers need to structure their offering to make a compelling case to consumers to continue to shop locally.... Recognition of these opportunities and threats is a key to store-based businesses being able to attract customers by offering a pleasant and successful shopping experience. This can be achieved with an inviting environment, friendly service, an understanding of customers' requirements and trouble-free transactions. Staff training and good sales techniques can ensure repeat business and store-based retailers can remain a viable part of regional communities".

There is a need to promote the level of personal skills involved in providing good customer service, and the value it provides to both businesses and the region as a whole. For the past four years, the *South Australia Works in the Regions* program (an employment program funded by the South Australian Government) has funded hospitality training for people seeking work or improved prospects in the industry. Consultation with hospitality employers has provided a steady input into the content of this training, and the need for customer service training has always had prominence. However, attempts to promote its importance to ~~both~~ prospective employees ~~and to a lesser extent to employers~~ were somewhat frustrated by poor take-up.

There are many anecdotes about varying standards of customer service received in the region, in both retail and hospitality/tourism contexts, and everyone 'has a story to tell'. To add to the anecdotal evidence, the Board instigated a project in the Clare Valley region to gather real data by measuring the current levels of presentation, customer service and sales skills. The data gathered could then be used to:

- provide constructive feedback to individual businesses that have been surveyed
- facilitate the development of customer service benchmarks for the Clare Valley region
- improve the standards of presentation and customer service to a level that meets or exceeds the expectations of locals and visitors to the region
- assist in sustaining a vibrant and viable hospitality/retail sector in the Region.

The project was joint-funded by the Inter-Regional Business Support Program, through the South Australian Department of Trade and Economic Development, and the *South Australia Works in the Regions* program, through the South Australian Department of Further Education, Employment, Science and Technology.

Methodology

LT Associates , a professional retail consultancy which has provided a number of retail training workshops and business mentoring in the region over some years and knows it well, was engaged to coordinate the research and compile the findings. Two mystery shoppers were selected to work alongside LT Associates, making sure the three shoppers represented a gender, background and age spread. Both of these mystery shoppers were trained by LT Associates in the techniques required and the use of a standardised research tool. The survey explores ten aspects of customer service, selling techniques/skills, and general presentation of the premise, and are based on criteria relating to the retail competency standards from the Retail Training Package, and the professional 'training points' within each standard. A professional consistency of approach, as well as cross-referencing of the three shoppers' reports, could thus be applied.

Thirty businesses from the retail precincts between Clare and Auburn were randomly selected, and then a further selection was made to ensure that there was a proportionate spread of retail, hospitality and service-related businesses throughout the towns. These thirty businesses were 'shopped' by the three researchers over late November and early December 2009.

The findings were collated by LT Associates, and with the assistance of Board staff, were compiled into a usable format under:

- summary results
- sector results, and
- results per individual business.

Feedback and analytical comments about each business and sector were provided by the consultant, highlighting strengths and suggested areas for improvement, which translate into opportunities to improve presentation standards, customer service and selling techniques. These have the potential to improve sales and profits with little effort or cost, and to create an exceptional shopping and tourism experience in the Clare Valley. The results for each individual business are not a part of the final report but will be made available to business owners on a confidential basis.

A comparison with findings from studies undertaken in comparable regions was also sought by the Board of the consultant, to further aid in the pursuit of setting benchmarks for the Clare Valley, should this be desired.

Overall Findings

A summary of the data collected showed:

1. The Tourism/Hospitality sector scored marginally better than businesses in the Business Services sector, and significantly better than retail businesses.
2. The lowest scores overall were in the aspects of Selling Techniques and especially Add-on Sales.
3. As a comparison with similar studies conducted in other comparable regions, the Clare Valley scored marginally higher than the Riverland region in all aspects, but scored lower in all aspects than the Hyde Park restaurant and retail precinct in Adelaide.

LT Associates reported that the shoppers experienced and observed customer service standards that were excellent, and met or exceeded the expectations of most customers. However in some of these cases local or known customers were treated with more smiles and sincerity than visitors.

While store appearance, including windows and lighting ranged from very good, others lacked the ‘magic power’ needed to maximise sales and profit opportunities. Some businesses know how to sell products or services, but selling technique overall was disappointing, with a few good exceptions. Some selling opportunities and possible repeat business may have been lost due to poor service standards. These translate as opportunities to develop and grow. Some businesses clearly have the potential to grow their financial outcomes, which will add to the economic wellbeing and employment of the region.

With the expected increase in population over time and the possibility of attracting more tourists to the region, businesses that use this feedback and data to identify, embrace, and strengthen their businesses will be well placed for increased customer numbers. The strengthening of local businesses will enable them to adapt to changing needs, and will ensure a broad trading mix which provides the services and products required for both locals and visitors to the region.

The region has an outstanding opportunity to become known as a ‘region that creates an exceptional shopping and tourism experience’ that people enjoy and want to return to.

Recommendations

1. Publicise and promote the findings of the report
2. Provide constructive feedback to individual businesses that have been surveyed
3. Explore the development of customer service benchmarks for the Clare Valley region
4. Explore means of raising the standards of presentation and customer service e.g. through training, promotion, mentoring, creation of awards and/or recognition of achievements, etc.
5. ~~Undertake comparative future studies~~
6. ~~Extend research to incorporate other towns in the region.~~

ATTACHMENTS

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Table 1: Overall Summary

	Shopper 1	Shopper 2	Shopper 3	Total	Possible Score	District Total Score	Tourism Hospitality Score	Retail Score	Business Services Score	Comparison Riverland	Comparison Hyde Park
Store arrival	17	18	19	**54**	60	90%	92%	88%	88%	87%	92%
Store appearance	22	24	25	**71**	96	74%	75%	73%	77%	71%	78%
Staff appearance	7	7	7	**22**	24	90%	90%	88%	96%	89%	94%
Acknowledged	6	5	5	**15**	24	64%	73%	57%	60%	54%	69%
Open a sale	12	11	10	**33**	48	70%	77%	61%	81%	68%	76%
Comfortable	3	3	3	**9**	12	78%	83%	73%	78%	67%	81%
Courtesy	13	11	12	**36**	48	74%	78%	69%	78%	73%	77%
Selling technique	16	16	16	**48**	84	57%	64%	49%	61%	56%	61%
Add-on sale	1	1	0	**2**	12	15%	15%	13%	19%	14%	25%
Farewell	6	7	6	**19**	30	62%	66%	50%	68%	57%	64%
TOTAL	**103**	**103**	**103**	**309**	438	70%	75%	65%	74%	68%	75%

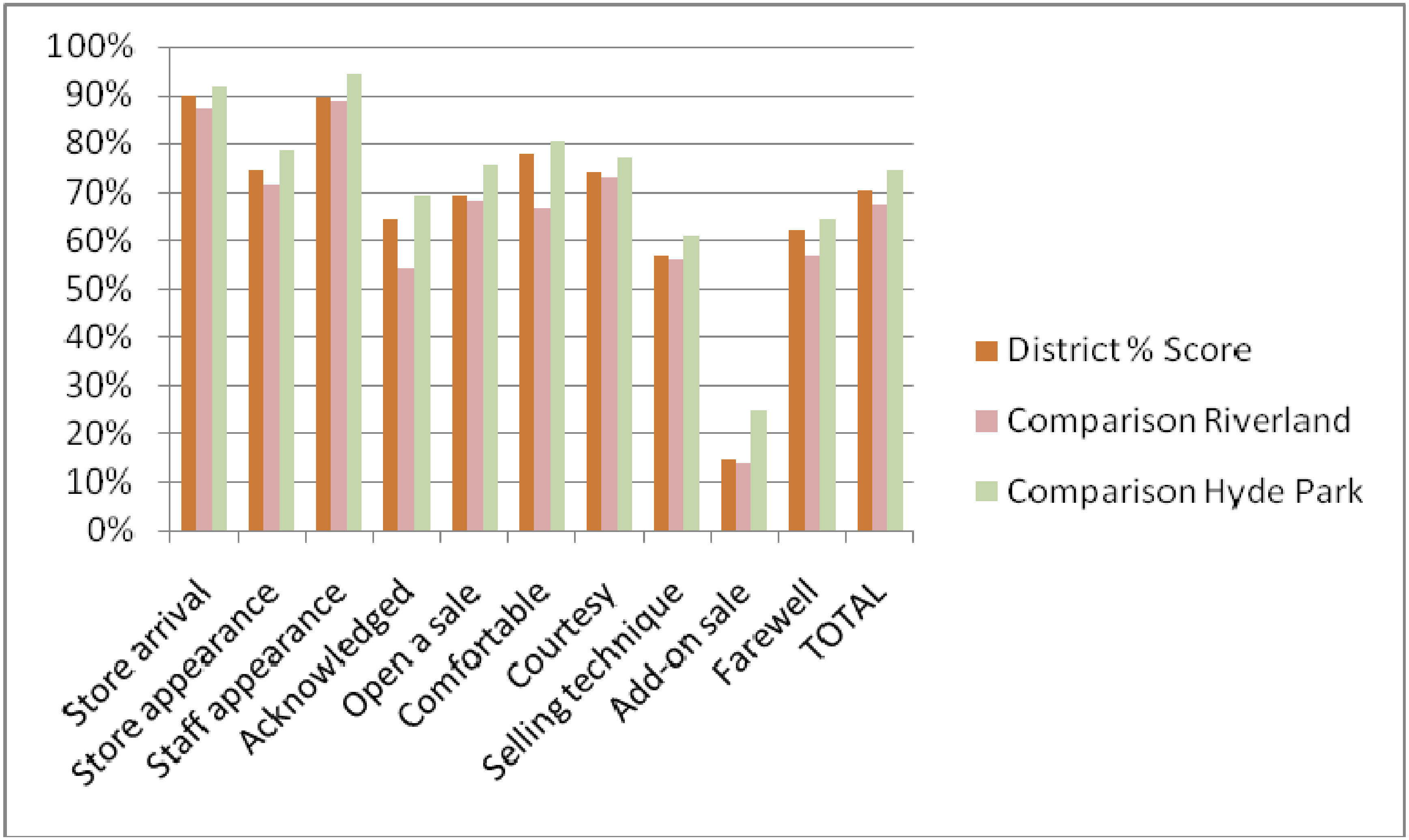
Consultant's Comments

While we found many businesses are well presented and performing well, there are many businesses that have the opportunity to develop and grow. Some clearly have the potential to grow their financial outcomes, and increase local employment. This growth potential will add to the economic wellbeing of the region.

Excellent standards were shown of quality customer service, with a prompt acknowledgement to greet, to welcome and relax, a sincere, friendly and helpful manner, and an appropriate farewell. This would meet the four major expectations of most customers. While the major steps in service were handled well, opportunities to help the customer find a suitable product/service were missed. Buying signals were not monitored and picked up. Therefore a significant number of opportunities to connect with the customers and make a sale were lost.

Training in the steps of the selling cycle, the approach to open-a-sale, through to add-on sales and closing a sale would assist businesses to open and close more sales, increasing turnover and profit. Sometimes substantial improvement can be made, which helps to build repeat business opportunities.

Figure 1: Regional comparison



YORKE AND MID NORTH

Table 2: Sector-Tourism/Hospitality

	shopper 1	shopper 2	shopper 3	Total	Possible Score	Hospitality Score	District Total Score	Comparison Hospitality Riverland	Comparison Hospitality Hyde Park
Store arrival	18	18	19	**55**	60	**92%**	**90%**	93%	95%
Store appearance	23	24	25	**72**	96	**75%**	**74%**	73%	78%
Staff appearance	7	7	7	**22**	24	**90%**	**90%**	92%	96%
Acknowledged	7	6	4	**18**	24	**73%**	**64%**	67%	79%
Open a sale	13	12	11	**37**	48	**77%**	**70%**	73%	81%
Comfortable	3	3	4	**10**	12	**83%**	**78%**	67%	83%
Courtesy	13	12	12	**38**	48	**78%**	**74%**	77%	79%
Selling technique	19	18	17	**54**	84	**64%**	**57%**	62%	67%
Add-on sale	1	1	0	**2**	12	**15%**	**15%**	17%	17%
Farewell	6	7	6	**20**	30	**66%**	**62%**	63%	63%
TOTAL	**112**	**108**	**106**	**326**	438	**75%**	**70%**	72%	77%

Consultant's Comments

Strengths

Location, access and entry to business were generally seen as appropriate for a range of customer types. A good range of business types was on offer for customers within this sector. Businesses were generally perceived to be well presented, adopting current practices, displaying a range of product and services to suit a variety of customer types. Some business however required distinct attention and improvement to sustain a good regional reputation. Overall staff members were well presented, acknowledged customers, displayed good hospitality and made them feel welcome.

Suggested areas for improvement (opportunities)

The following training and development opportunities to improve business potential were offered:

Service opportunities: to consistently use the four key elements of service delivery – acknowledgment, welcome, engagement, farewell - so customers experience great hospitality throughout the region.

Selling opportunities: increase business results by using techniques to defining customer needs more effectively, promoting products/services, stronger selling techniques to match customer needs and maximising add-on sales opportunities.

Merchandising opportunities: attention to in-store signage, stronger housekeeping disciplines, creating fresh and eye-catching displays and points of interest for potential customers.

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Table 3: Sector - Retail

	shopper 1	shopper 2	shopper 3	Total	Possible Score	Retail Score	District Total Score	Comparison Retail Riverland	Comparison Retail Hyde Park
Store arrival	16	17	19	**53**	60	**88%**	**90%**	82%	93%
Store appearance	22	24	25	**70**	96	**73%**	**74%**	68%	78%
Staff appearance	7	7	7	**21**	24	**88%**	**90%**	88%	96%
Acknowledged	5	4	5	**14**	24	**57%**	**64%**	50%	63%
Open a sale	10	9	10	**29**	48	**61%**	**70%**	56%	63%
Comfortable	3	3	3	**9**	12	**73%**	**78%**	67%	75%
Courtesy	12	10	12	**33**	48	**69%**	**74%**	67%	71%
Selling technique	13	12	17	**41**	84	**49%**	**57%**	46%	54%
Add-on sale	1	0	1	**2**	12	**13%**	**15%**	17%	33%
Farewell	5	5	6	**15**	30	**50%**	**62%**	47%	57%
TOTAL	**93**	**90**	**103**	**287**	438	**65%**	**70%**	61%	70%

Consultant's Comments

Strengths

Location, access and variety of business types were seen as appropriate for this region. Presentation and entry to stores varied considerably across the region and offers opportunity for development of business potential. Service delivery and selling to customers were rated at or below average within the region.

Suggested areas for improvement (opportunities)

The following training and development opportunities to improve business potential were offered:

Service opportunities: develop strong retail standards within stores to establish an impact in the sector and region. Consistency of service delivery will encourage greater customer interactions and increase results.

Selling opportunities: Customers' expectations were not always met and offer considerable scope for increasing business revenue. Areas that require attention ranged from opening sales effectively, defining needs, promoting products, add-ons sales and closing sales.

Merchandising opportunities: some stores would benefit greatly from reviewing their current practices in presentations, product layouts and displays to increase customer traffic and sales.

Table 4: Sector - Business Services

	shopper 1	shopper 2	shopper 3	Total	Possible Score	Business Services Score	District Total Score	Comparison Business Riverland	Comparison Business Hyde Park
Store arrival	17	19	17	**53**	60	**88%**	**90%**	87%	87%
Store appearance	19	27	27	**74**	96	**77%**	**74%**	73%	79%
Staff appearance	8	8	7	**23**	24	**96%**	**90%**	88%	92%
Acknowledged	3	7	4	**14**	24	**60%**	**64%**	46%	67%
Open a sale	16	16	7	**39**	48	**81%**	**70%**	75%	83%
Comfortable	3	4	2	**9**	12	**78%**	**78%**	67%	83%
Courtesy	14	15	9	**38**	48	**78%**	**74%**	75%	81%
Selling technique	20	25	6	**51**	84	**61%**	**57%**	60%	63%
Add-on sale	1	2	0	**2**	12	**19%**	**15%**	8%	25%
Farewell	6	10	4	**20**	30	**68%**	**62%**	60%	73%
TOTAL	**107**	**132**	**85**	**323**	438	**74%**	**70%**	69%	76%

Consultant's Comments

Strengths

Location, access and entry to businesses were generally seen as appropriate for a range of customer types. Businesses were perceived by customers to be well presented, professional and easy to deal with good service standards overall. Staff members were seen as approachable, courteous and generally attentive in this sector.

Suggested areas for improvement (opportunities)

The following opportunities to improve business potential were offered:

Service opportunities: more consistency from staff members in service delivery to customer and undivided attention when with customers.

Selling opportunities: to gather more information about customer needs, sell product/services, handle objections, promote suitable products, confirm sales, maximise value-add opportunities.

Merchandising opportunities: stronger retail disciplines are adopted to include layout of stock, placement of products, service offerings, housekeeping and creating more eye appeal in presentations.

Figure 2: Sector comparison

Retail Study of the Clare Valley 2009 / 10

An adjunct to the Clare Valley Customer Service Project

Undertaken by Regional Development Australia Yorke and Mid North

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An Australian Government Initiative

Government of South Australia

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Research undertaken by Alan Schwarz (Business Development Officer) for the Mid North Regional Development Board (now known as Regional Development Australia Yorke and Mid North)

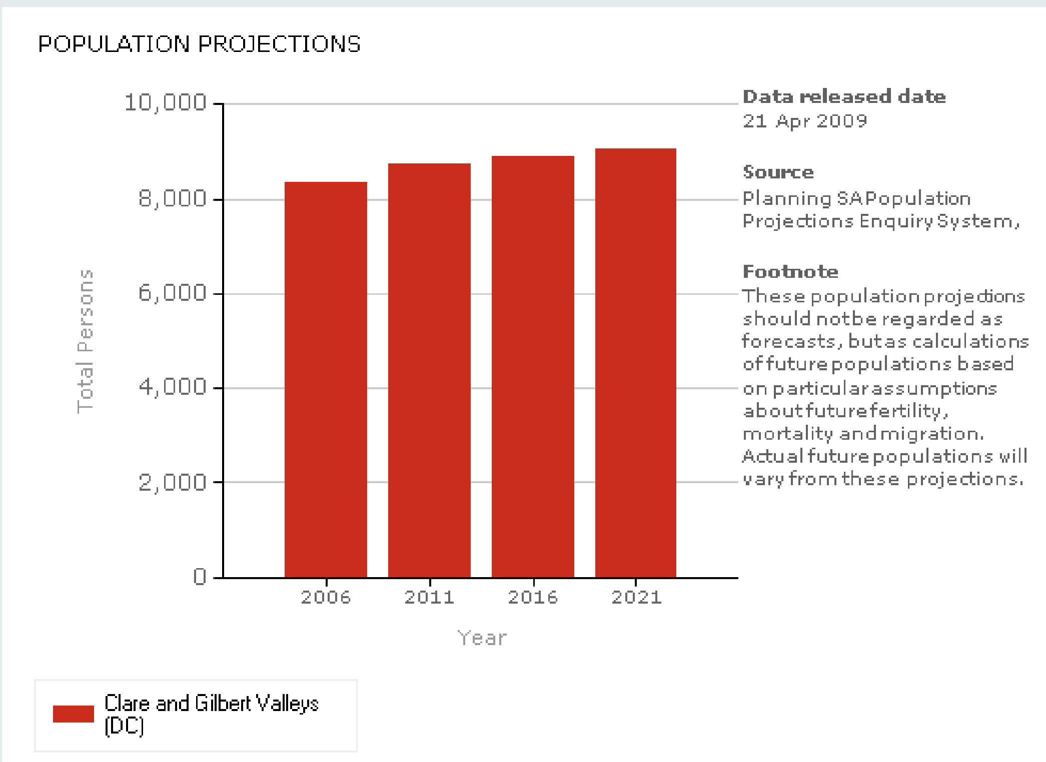
1. Background

This study was undertaken by the Mid North Regional Development Board (now known as Regional Development Australia Yorke and Mid North) to gain a better understanding of the local retail sector, its sustainability and future prospects. The study was completed in conjunction with a Customer Service Project in the Clare Valley, undertaken November-December 2009, which was designed to ascertain current retail performance and customer service skills in the Region, and to form a basis for future skills development and training needs.

This study has identified population totals and trends, development application data, average net business and personal income, and key socio-economic characteristics which are relevant to the current and future performance of the retail sector in the Region.

2. Regional Context

Figure 1 – Population Trends



The data shows a projected population increase across South Australia, and if this trend is translated into the Clare Region could see a population increase of around 10% in total over the next 15 years. This could lead to an increase in retail opportunity in the Region.

Figure 2 - Population Totals

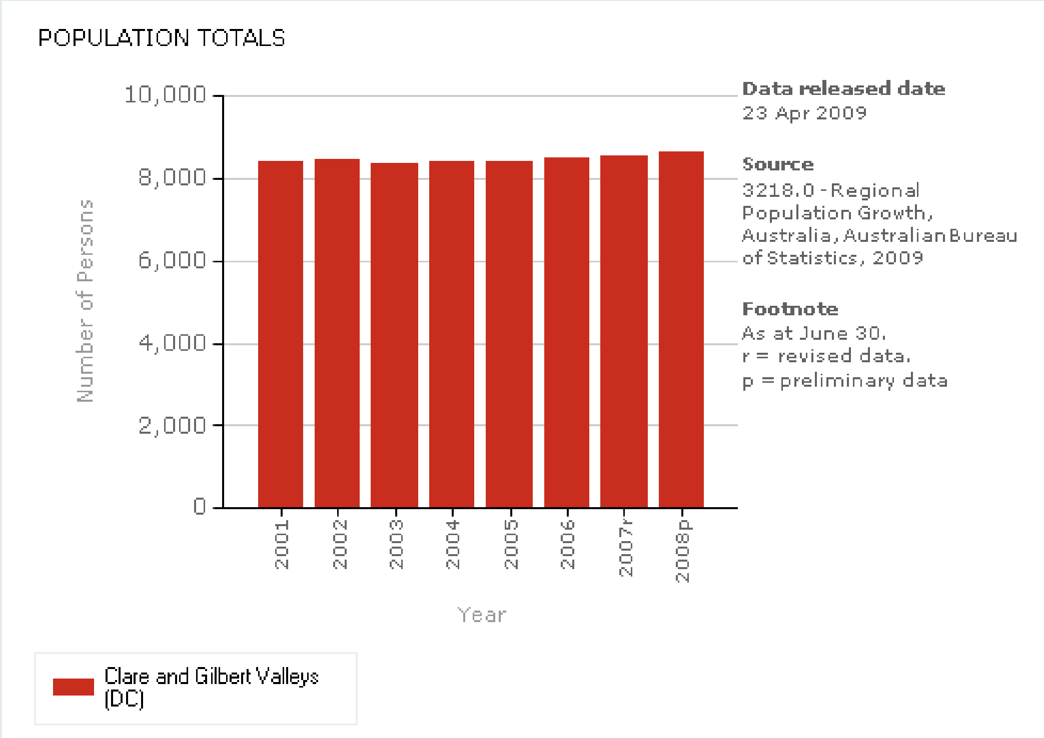


Table 1 – Industry Sectors – Number of Businesses

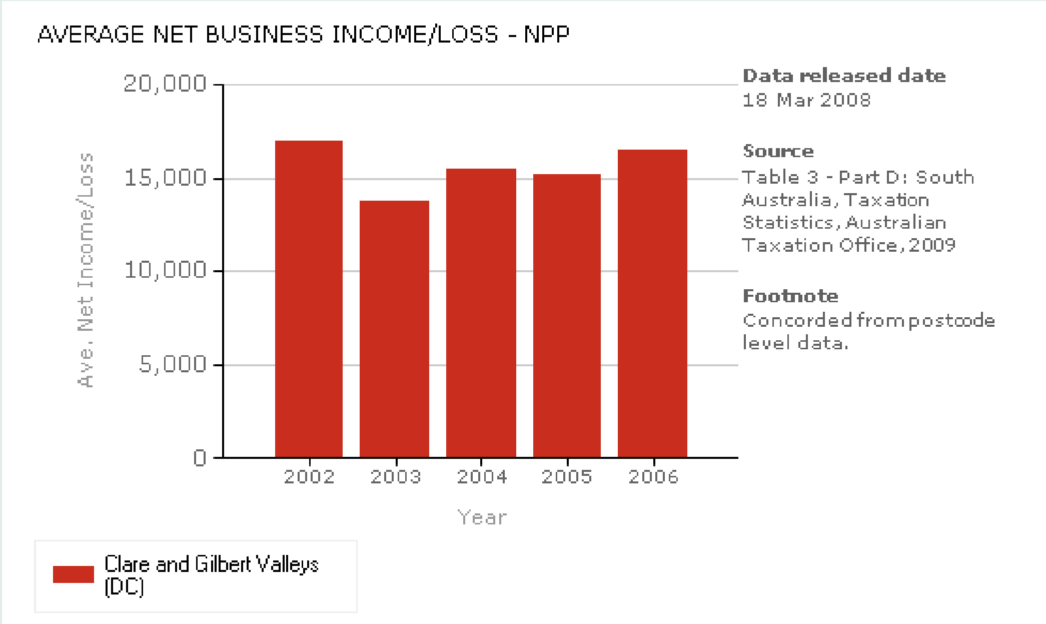
Industry	Mid North, SA		South Australia	
	Number	% of Total	Number	% of Total
Agriculture, Forestry & Fishing	1,308	48.3	23,195	15.3
Mining	n/a	n/a	488	0.3
Manufacturing	99	3.7	8,661	5.7
Electricity Gas Water	n/a	n/a	121	0.1
Building Construction	158	5.8	18,946	12.5
Wholesale Trade	38	1.4	5,316	3.5
Retail Trade	**202**	**7.4**	**16,508**	**10.9**
Accommodation, Restaurants, Cafes	**78**	**2.9**	**3,627**	**2.4**
Property & Business Services	**5**	**0.2**	**393**	**0.3**
Transport & Storage	57	2.1	8,316	505
Communication Services	n/a	n/a	2,143	1.4
Finance Insurance	61	2.3	14,552	9.6
Ownership of Dwellings	248	9.1	28,668	19
Public Admin & Defence	11	0.4	2,247	1.5
Education	35	1.3	6,828	4.5
Health & Community Serv	31	1.1	3,977	2.6
Cultural & Rec Serv	71	2.6	6,973	4.6
Personal & Other Serv	n/a	n/a	235	0.2
Total	**2,711**	**100.0**	**151,194**	**100.0**

Source: ATO – ABN Registrations, 2001.

According to the Australian Business Register, in 2001, there were 2,711 single location businesses in the Mid North region, including Goyder Council and the southern part of Northern Areas Council. 10.5 percent (or 285) of these businesses were in the Retail, Accommodation, Restaurant and Business Services sector.

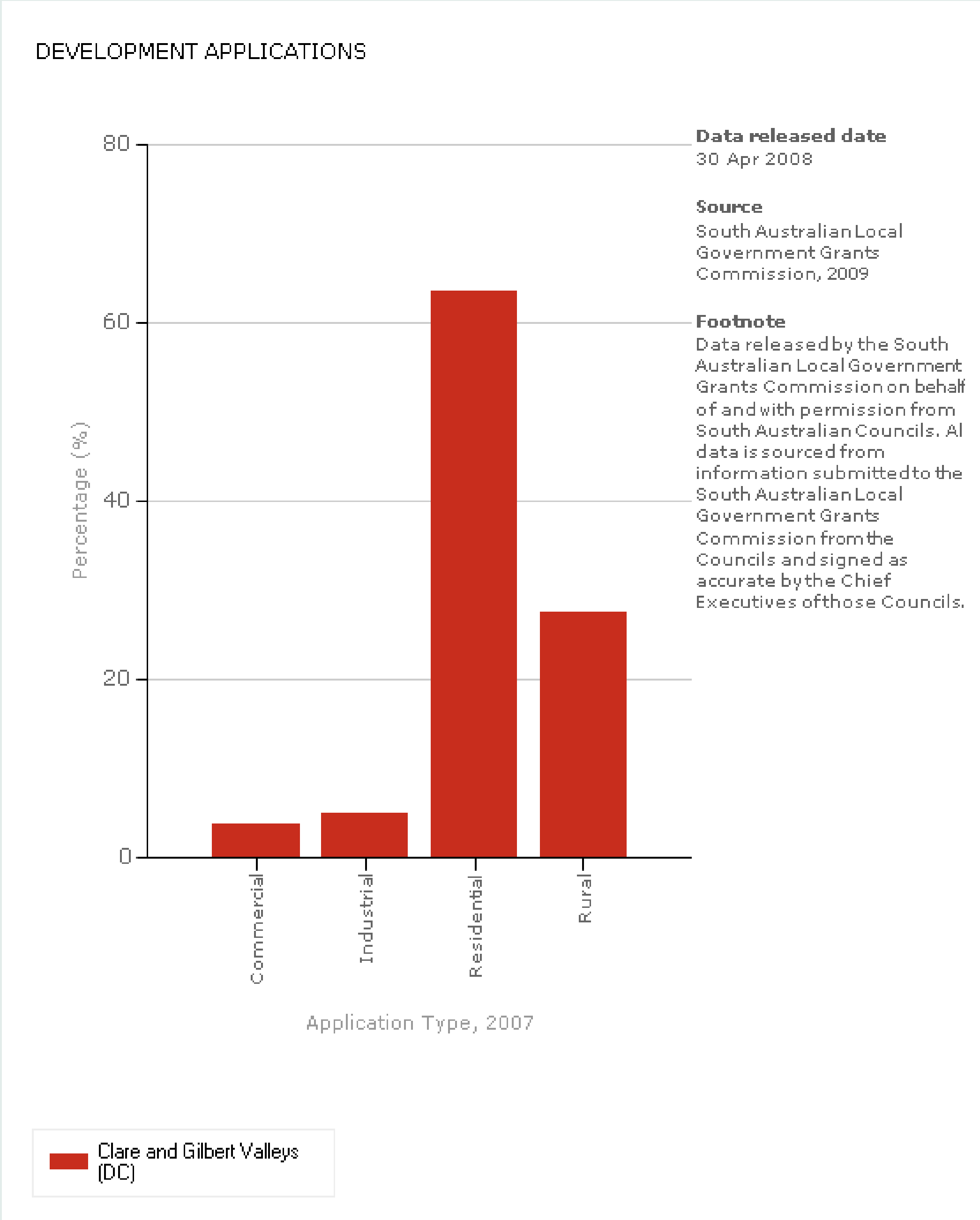
At the State level, there were 151,194 single location businesses. 13.6 percent of these businesses were in the Retail, Accommodation, Restaurant and Business Services sector.

Figure 3 – Business Income



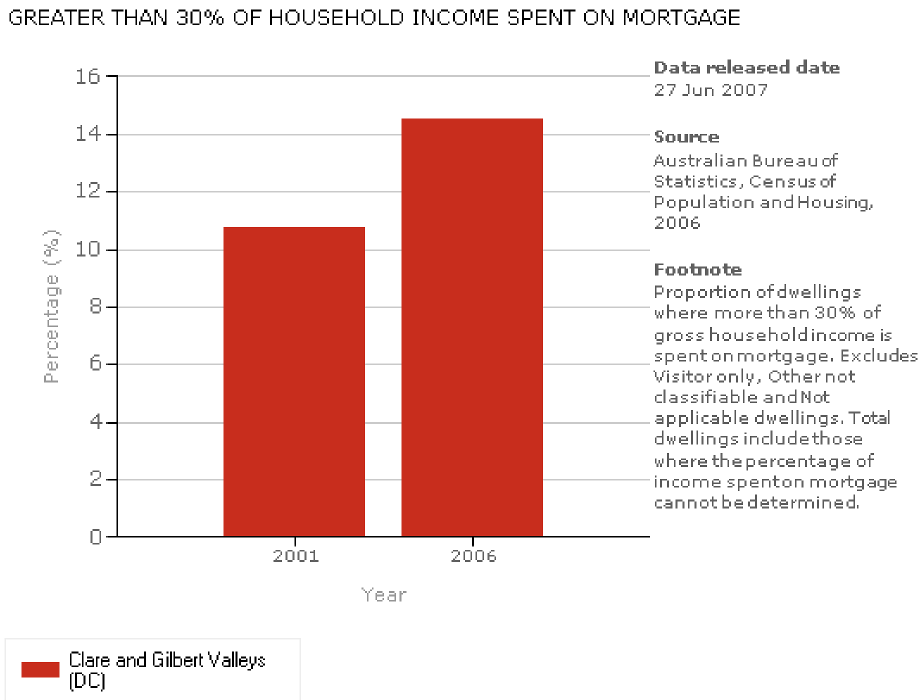
Average net business income has fluctuated across the reporting period, probably influenced by seasonal conditions experienced in the Region. Income from primary production businesses can influence retail spend in a district, which in turn affects business income in the retail sector.

Figure 4 - Regional Development



There continues to be strong growth in the Region, particularly with new residential development. This augers well for maintenance or increase in the level of retail demand in the Region.

Figure 5 – Housing Affordability



Figures 5 and 6 shows a trend over recent years that a larger percentage of household income is committed to rent and mortgage repayments. This impacts the amount of disposable income available for retail expenditure.

Figure 6 – Disposable Income

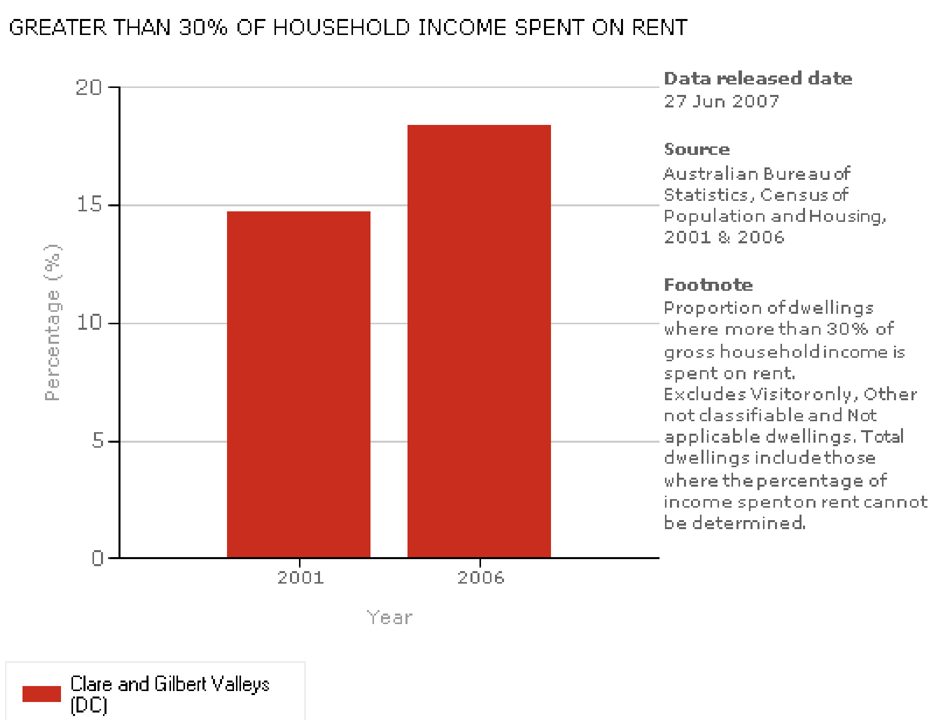
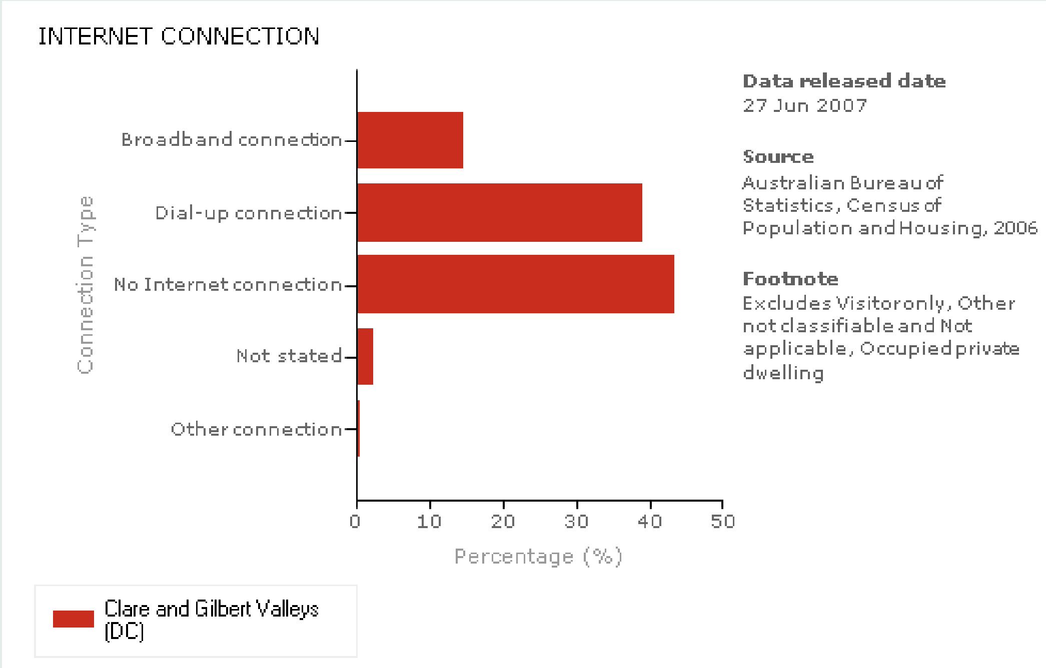
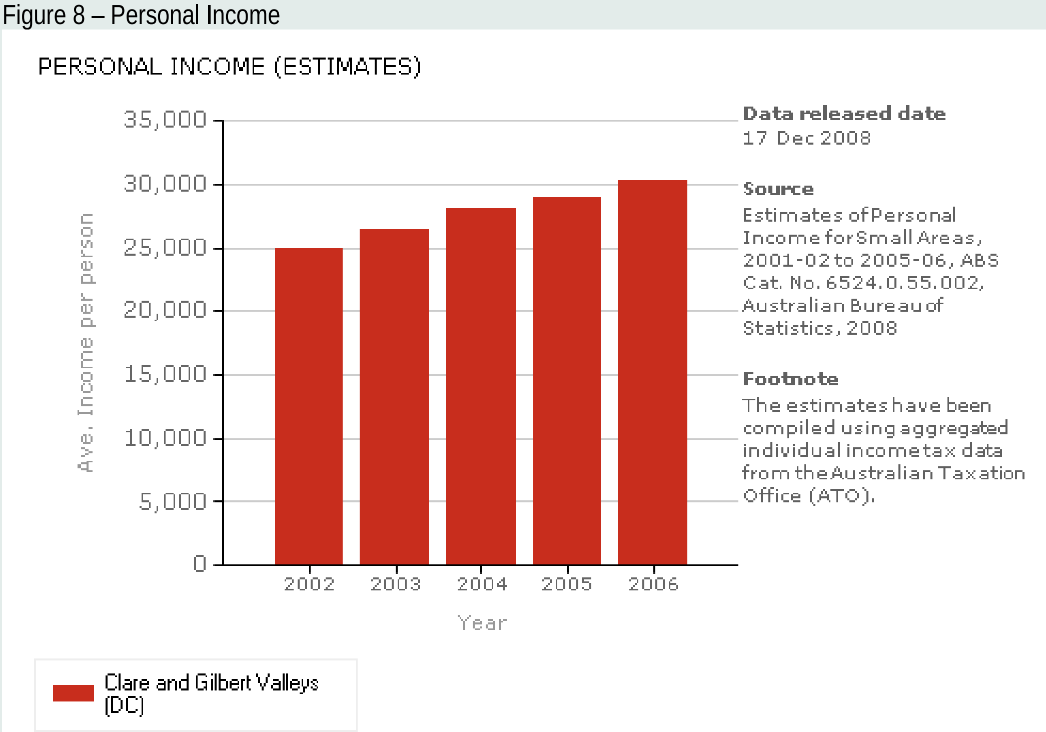


Figure 7 – Internet Connection



The Figure shows that the majority of the population in the Region have internet access, making internet shopping and on-line ordering a reality for many residents in the Region, and increasingly competing for retail dollars.

Figure 8 – Personal Income



The trend is for personal income to increase, possible allowing an increase in disposable income for retail expenditure.

3. Economic Situation

Available data shows the Clare Regional economy is well diversified and continues to grow at a pace consistent with State averages. The number of new development applications demonstrates a high level of confidence and a willingness to reside and invest in the Region.

Clare is finding its place as a Regional centre and this has led to recent expansion in provision of government services and an increase in retail space and diversity.

4. Retail Centres

Table 2 – Regional Retail Data

Unfortunately the most recent available data available from the Australian Bureau of Statistics is now many years old. However it still demonstrates some relativities that remain relevant.

Retail data for Mid North South Australia in 1991-92

Statistical Local area	Current Council	Locations	Employees	Retail Floorspace (m2)	Turnover
Blyth-Snowtown (DC)	Wakefield (DC)	19	47	2,000	$3,648,000
Burra Burra (DC)	Goyder (RC)	37	102	5,000	$10,185,000
Clare (DC)	Clare & Gilbert Valleys	59	278	10,000	$26,332,000
Eudunda (DC)	Goyder (RC)	13	56	2,000	$3,367,000
Riverton (DC)	Clare & Gilbert Valleys	21	60	3,000	$4,413,000
Saddleworth/Auburn (DC)	Clare & Gilbert Valleys	27	70	3,000	$3,009,000

Source: 1991-92 Retailing in South Australia (ABS 1994)

Clare is clearly the dominant retail centre in the Mid North of South Australia, and this position has been strengthened over time. In recent years there has been significant retail development in Clare including;

Country Target
Cheap as Chips
Strip shop development in main precinct

This development has been confined to the main shopping precinct, avoiding fragmentation of retail shopping areas.

5. Retail Employment

Table 3 – Industry of Employment

	Clare & Gilbert Valleys (DC)				
	2006	Change since 2001		Percentage 2006	
Industry Sector	No.	No.	%	Clare & Gilbert Valleys (DC)	South Australia
Agriculture, Forestry & Fishing	938	44	4.9%	23.6%	4.7%
Mining	47	24	104.3%	1.2%	0.9%
Manufacturing	447	-32	-6.7%	11.2%	13.2%
Electricity, Gas & Water Supply	31	6	24.0%	0.8%	0.8%
Construction	223	51	29.7%	5.6%	6.7%
Wholesale Trade	119	-22	-15.6%	3.0%	4.3%
Retail Trade	**496**	**0**	**0.0%**	**12.5%**	**14.7%**
Accommodation, Cafes & Restaurants	**255**	**5**	**2.0%**	**6.4%**	**4.4%**
Property & Business Services	**200**	**-2**	**-1.0%**	**5.0%**	**9.1%**
Transport & Storage	137	43	45.7%	3.4%	3.9%
Communication Services	33	-2	-5.7%	0.8%	1.3%
Finance & Insurance	74	2	2.8%	1.9%	3.2%
Government Administration & Defence	104	23	28.4%	2.6%	5.2%
Education	273	-2	-0.7%	6.9%	7.4%
Health & Community Services	403	87	27.5%	10.1%	12.7%
Cultural & Recreational Services	18	-7	-28.0%	0.5%	1.8%
Personal & Other Services	100	-6	-5.7%	2.5%	3.8%
Total	**3,981**	**232**	**6.2%**	**100.0%**	**100.0%**

Source: Australian Bureau of Statistics, Population Census

Industry of Employment data from 2006 census shows that the retail, accommodation and business services sectors account for 951 jobs or 23.9% of the regional workforce, making this segment the most significant employer in the Region, ahead of Agriculture. There has been growth of 3 positions or 1% in this sector since the 2001 census.

6. Future Challenges

There are many challenges facing regional retailers into the future. With improved transport infrastructure, regional retailers face the on-going threat of sales leakage to other larger regional centres and to capital cities. This is exacerbated by modern communication systems where consumers can be specifically targeted with attractive sales promotions, and over-whelmed with the range of offering in larger centres.

However, the biggest challenge presented to existing Main Street retailers is on-line and internet ordering from virtual stores. On-line sales continue to impact traditional retailers as time-poor consumers become more comfortable with on-line transactions. This threat is across almost all consumer lines from jewellery and perfumes to clothing, shoes, car parts, homewares, foods and fresh produce, to whitegoods and furniture. Retailers need to structure their offering to make a compelling case to consumers to continue to shop locally and in person.

Clare has an opportunity to develop a stronger tourist retail spend by presenting an attractive offering to visitors to the Region, particularly on weekends. However, recent experience indicates extended weekend trading hours may not be sustainable unless there is an increase in the number of stores opening, creating a viable, vibrant critical mass that attracts more consumers. Visitors may feel the current offering provides in-sufficient unique retail experiences and expression of local produce to warrant inclusion in their itinerary.

Recognition of these opportunities and threats is key to store-based retailers being able to attract and retain customers by offering a pleasant and successful shopping experience. This can be achieved with an inviting environment, friendly service, an understanding of customers requirements and trouble-free transactions. Good business management, well-trained staff and good sales techniques can ensure repeat business enabling store-based retailers to remain a viable and vibrant part of Regional communities.

7. References

EasyData Statistics from various sources
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