



GIBSON QUAI·AAS  
CONSULTING

## Retail Futures

*Technology Outlook of Australia's Retail Industry*

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# Australia's Retail Industry Snapshot

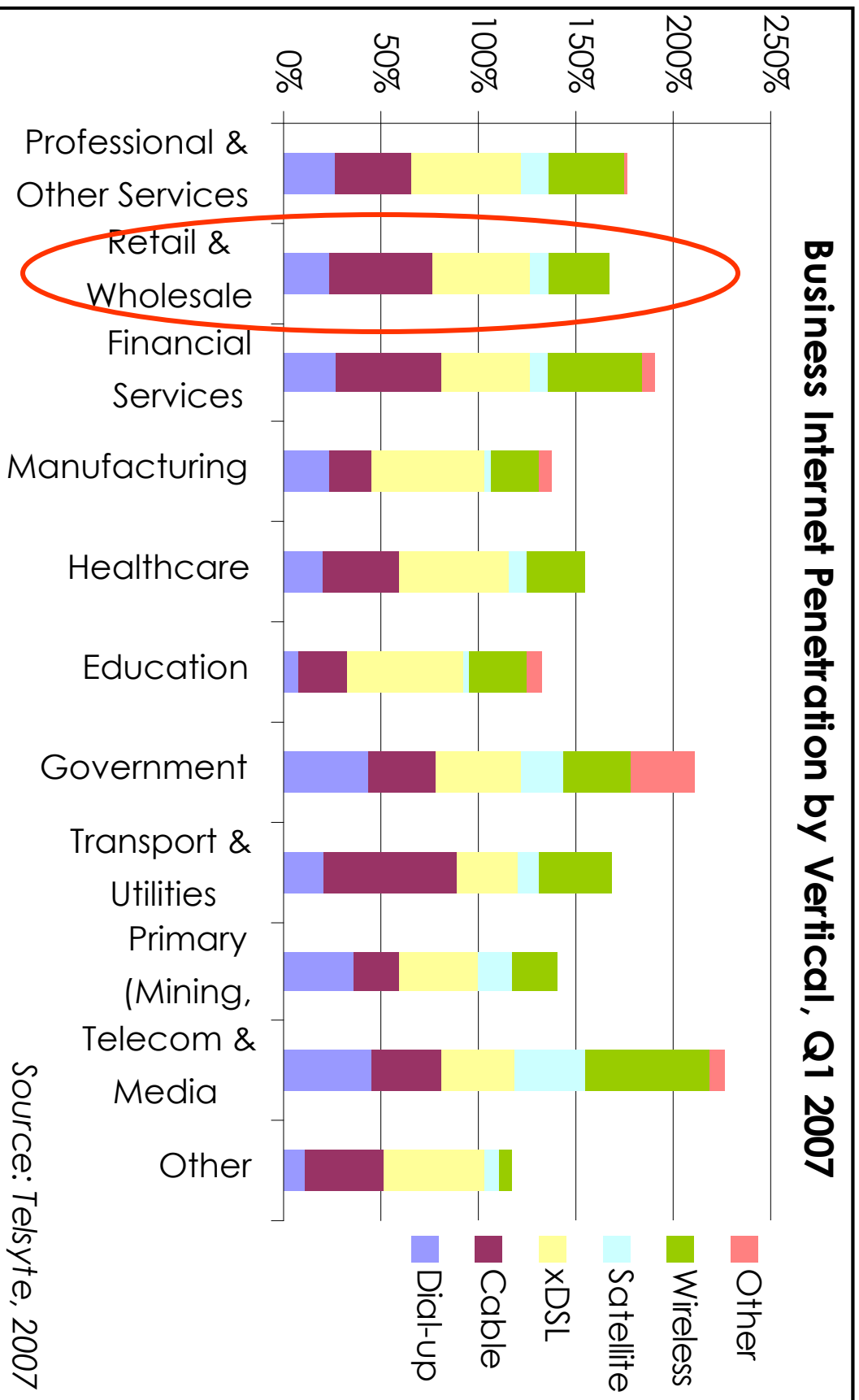
## Demographics

- 126,000 businesses nationwide; one-third in NSW, one-quarter in VIC, 20% in QLD
- Largest employing sector, employing 1.5 million Australians, or 15% of all employment
- Sector turnover \$216 billion in 2006, Coles Group revenue = \$32 Billion and Woolworths revenue = \$34Billion
- Retail is in the top five best-performing sectors, growing 4.4% in 2006

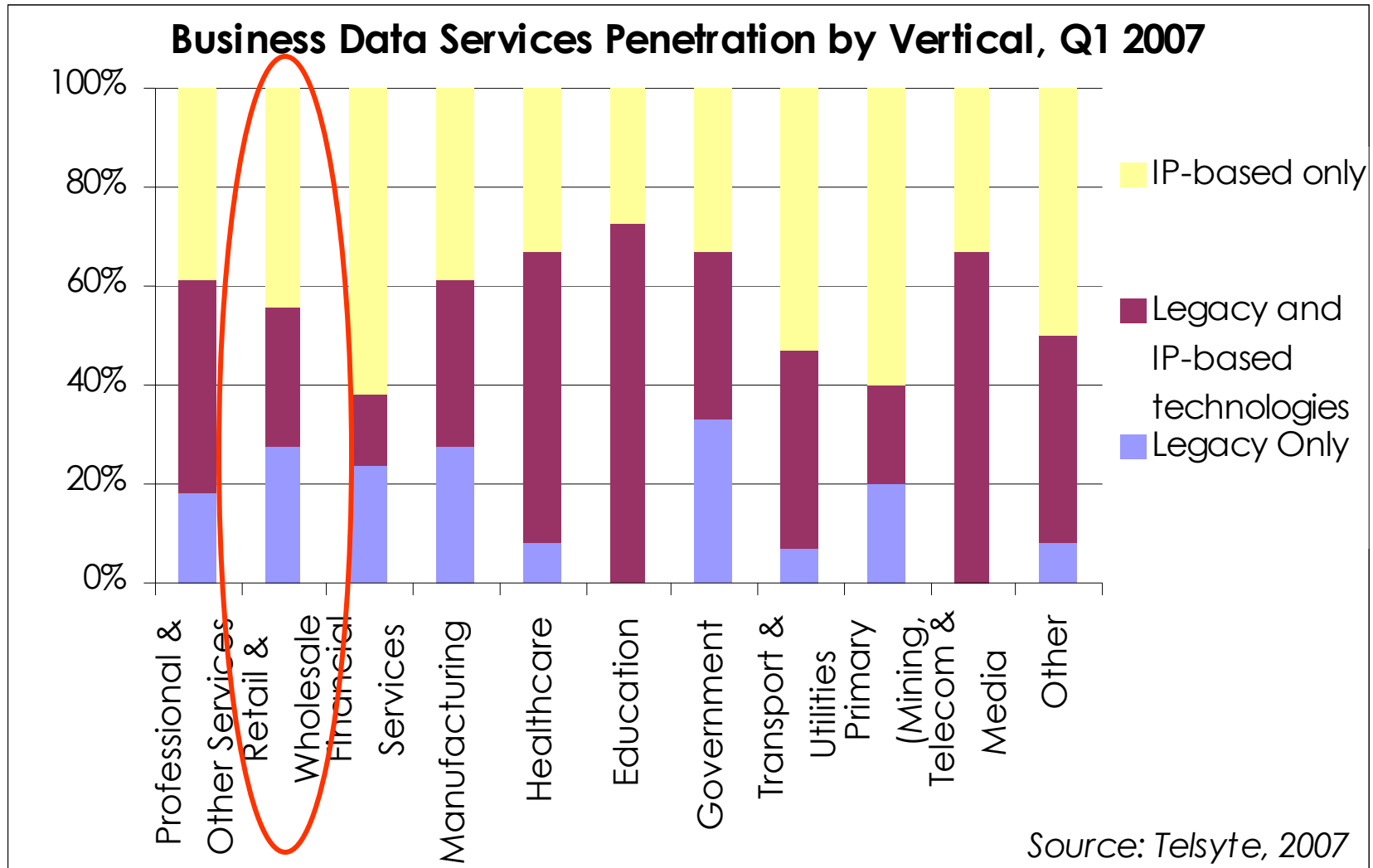
## Telecom Usage

- One of the most active in business internet, IP based Business data services and mobile usage

# Internet Penetration

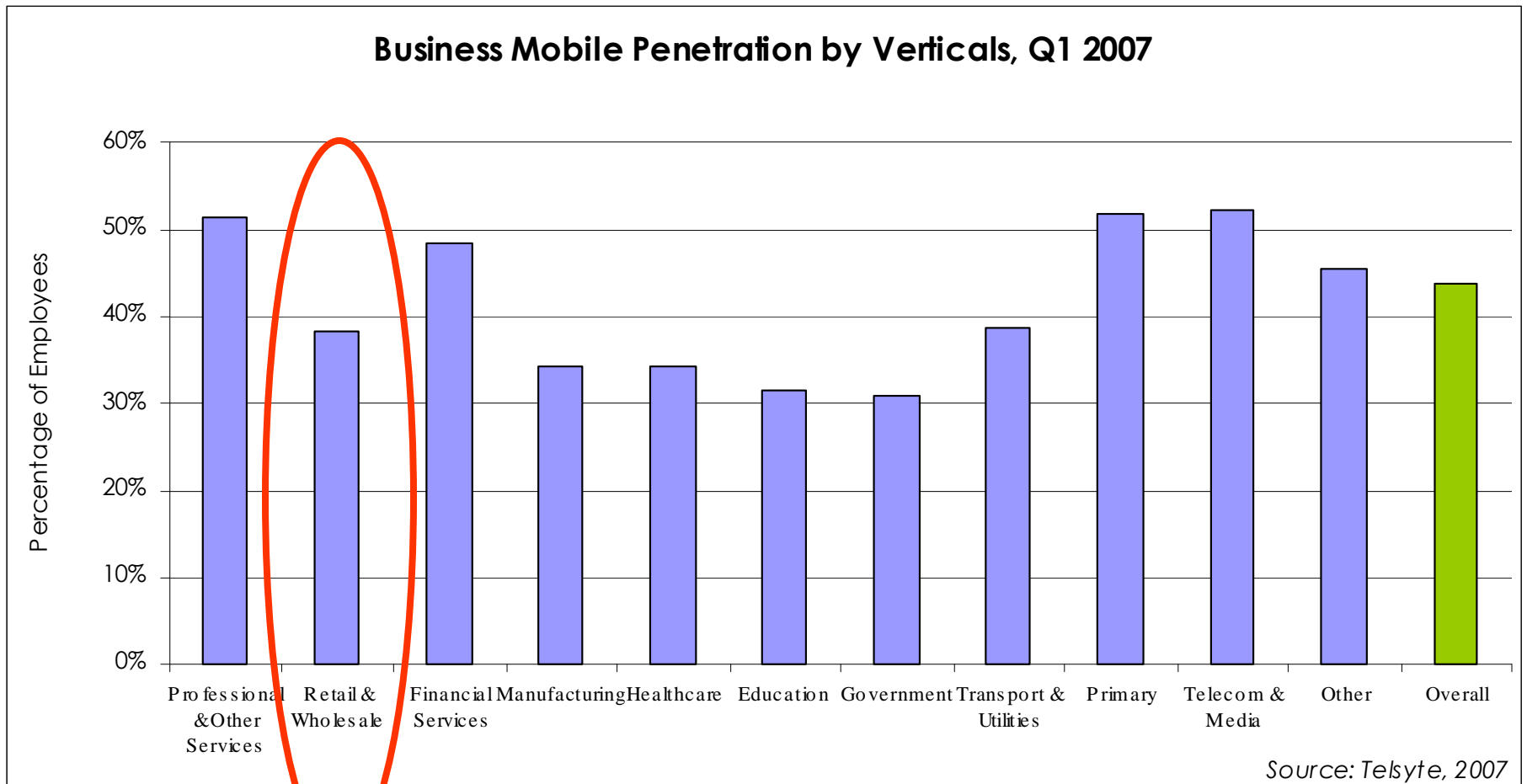


# Business Data usage



# Mobile usage

Business Mobile Penetration by Verticals, Q1 2007



# Australia's Retail Industry Opportunities\*

## Key Business Drivers

- Operational efficiency due to geographically disperse branch operations, extensive data capture and processing is required
- Operational excellence at store level
- Market responsiveness and improved inventory/logistics management through better integration with suppliers
- Enhanced customer experience due to tight competition through data management and business intelligence

## Key Reasons for Adopting Telecom Technology (in order of importance)

- Improve organisational communications
- Increase employee productivity
- Cut cost through efficiency

## Solution Growth Areas in Next 12 Months

- VoIP/IP Telephony
- Wireless RFID
- Mobile CRM/Field force automation

# Telcyte annual Telco decision makers survey

- This presentation is based on the results of Telcyte's annual business telecommunications decision maker survey, an online survey of usage, spending, preferences and adoption trends by corporate Australia. The survey covers Telcyte's three core competency areas of Fixed Line and Broadband, Mobile and Wireless, and Enterprise Communications.
- Each year, about 1000 respondents from all business sizes and vertical industries from across the country are recruited to participate in the survey, making it the largest of its kind in Australia. Participants go through a set of strict selection criteria, in which they are selected based on their understanding of their company's telecommunications usage, requirements and future directions, and their authority to make purchase decisions. They are made up of CEOs/MDs, CFOs, CIOs/CTOs, IT and telecom managers, as well as line-of-business managers. Samples are randomly selected and quotas are imposed to ensure participants represent a valid reflection of the actual distribution of Australia's business demographics.
- For the 2007 survey, a total of 915 respondents participated in the survey during the months of March and April. Approximately 300 decision makers participated in each core competency area, yielding an overall statistical accuracy level of 95% +/- 5%, 19 times out of 20.
- Telcyte is a business unit of Gibson Quai-AAS