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INDUSTRY REPORT



FUTURE FOCUSED: INNOVATORS' EDITION

EXPLORING THE IDEAS AND LEADERS REDEFINING RETAIL IN AUSTRALIA.

OUTLOOK FOR
AUSTRALIAN
RETAIL IN FY26E
Craig Woolford
MST Marquee

THE QUIET
REVOLUTION IN
AISLE THREE
Simone Heath
Creative Activation

A RARE AUDIENCE WITH
TWO OF AUSTRALIAN
RETAIL'S MOST
INFLUENTIAL VOICES
Bianca Velez
BLANC Media & Marketing



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CONTENTS

8

OUTLOOK FOR AUSTRALIAN RETAIL IN FY26E

By Craig Woolford
Senior Analyst, MST Marquee

12

HOW TO CAPITALISE ON GROWTH OPPORTUNITIES IN PHARMACY RETAIL

By Ben Dixon
CEO, Fonto

16

MIND THE GAP

By David Shukri
Client Service Director,
Shopper Intelligence

18

INNOVATION FATIGUE: WHY FMCG NEEDS SMARTER FASTER PRODUCT VALIDATION

By Sam Gilding
Product Intelligence Expert, Vypr

20

SHINING A LIGHT ON RETAIL LEASING: HOW DATA EMPOWERS TENANTS

By Mark Raphael
Founder & CEO,
Lighthouse Insights

22

THE QUIET REVOLUTION IN AISLE THREE

By Simone Heath
CEO, Creative Activation

24

DESIGNING TOMORROW

By Tyler Franko
Dynamic Code

26

THE DEATH OF THE HANDSHAKE

By James Gardner
Senior Operations & Strategy
Consultant,
Joe Berry Award Finalist

28

TRUST ME ITS HALF PRICE!

By Bernie Brooks AM
Company Chairman and Retail
Advisor

29

INNOVATION CONVERSATION

By Samantha Corrigan
Innovation Manager,
Jack Link's Asia Pacific

32

A RARE AUDIENCE WITH TWO OF AUSTRALIAN RETAIL'S MOST INFLUENTIAL VOICES

By Bianca Velez
Founder, BLANC Media & Marketing

36

THE JBA EFFECT: LIFE AFTER WINNING THE ACTIVATE JOE BERRY AWARD

By Sarah Hughes
2015 Joe Berry Award winner
Head of Wholesale, Mosey Me

39

FACING THE JOE BERRY CHALLENGE

By Holly Gregory
Assistant Brand Manager, Tim
Tam

41

CULTIVATING TALENT, FUELLING GROWTH

By Cathy Garrone
National Account Executive,
Coffee at CCEP

43

AN INSIDE LOOK AT A MENTORED INDUSTRY

By Keith Quigg
Director/CEO,
Activate Group Activate

47

FASTER, BOLDER, SMARTER

By Olivia Grey
Marketing Manager,
VidaCorp

50

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By Tony Klatt
Retail Tasker, Win on the Shelf

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Retail Tasker, Win on the Shelf

LETTER FROM THE EDITOR



If there's one constant in Australian retail, it's motion. Shelves turn, expectations rise, channels blur and the line between brand, experience and community grows ever thinner. In that motion there is meaning, and that is where the Activate Industry Report sets its anchor. Our purpose is simple: to elevate the conversation, connect the right voices and turn insight into confident action for the year ahead.

This edition lands at a defining time. A new generation of leaders are stepping forward and asking sharper questions about growth, capability and culture. The through-line across these shifts is not technology alone — it's judgement. Tools accelerate: people decide.

Inside these pages you'll find the work of people who build and test in the real world: data leaders turning insight into shelf reality; operators proving that brilliant basics still win; creative and experiential experts showing how emotion moves product, and technology partners sharing the latest and greatest.

Where possible, we've pushed for outcome-based thinking — because ambition without measurement is theatre, and measurement without ambition is maintenance.

A personal note of thanks: to our contributors, mentors, judges and sponsors, and to the companies investing time, transparency and resources so the whole community can learn faster, and to the growing Activate membership that keeps us honest and ambitious. You make this report possible — and valuable.

If you are an emerging leader, consider the following invitation: enter the Joe Berry Award, ask big questions and put your ideas under lights.

If you are a senior executive, open a door — sponsor a candidate, share a case study or host a conversation. Our industry doesn't strengthen by accident: it strengthens by design.

Finally, a request, we would love it if you could share the wins — and the misses — with us, so we can keep curating what matters, spotlighting what works and building the community that helps Australian retail move with confidence.

Onwards and upwards, always.

Bianca Laurel-Velez
Editor-in-Chief, Activate Industry Report
Board Director, Activate Group Australia

ACTIVATE GROUP IS IN ACTION TO CHANGE THE SHAPE OF THE RETAIL INDUSTRY.

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Working with members and associates to bring recognition to everyone who contributes to the success of retailers, suppliers, brands and individuals.

Our Activate Round Tables are inclusive and unique in their objectives.

You can join-in on and ART sessions by contacting Activate through enquiries@activateaus.com.au

Be part of giving your team some well earned recognition within this dynamic industry.

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LETTER FROM THE CHAIR



Welcome to the latest thought leadership-packed edition of the Industry Report brought to you by Activate - a member based not for profit organisation representing retail marketing services providers, and custodian of the coveted Joe Berry Award.

The retail industry faces some interesting headwinds in the coming 12 months despite some green shoots of economic recovery. Continued geopolitical challenges married to generational change driven by technology such as AI make for a volatile and unpredictable landscape.

At Activate, we believe now this is the time to step forward and actively shape the industry we all share.

Activate is well positioned to support its members and the wider industry in navigating these headwinds. Through talent development, by nurturing the next generation of leaders with mentorship and opportunity. Through communication, by connecting voices, ideas, and insights across the ecosystem. And through advocacy, by ensuring our industry has a united and respected presence in the broader business conversation.

But this isn't work we do alone. The Activate movement is powered by collaboration—by leaders and companies who see the value in building not just for today, but for the future of retail in Australia.

I invite you to be part of this movement. Join us in developing talent, sparking dialogue, and strengthening advocacy. Together, we can continue to create the kind of industry that doesn't just adapt to change—but leads it.

To join Activate Group Australia, reach out to us at enquiries@activateaus.com.au.

Matt Lloyd
Chairman, Activate Group Australia



OUTLOOK FOR AUSTRALIAN RETAIL IN FY26E

Sales growth should be resilient through 2025



By Craig Woolford
Senior Analyst, MST Marquee

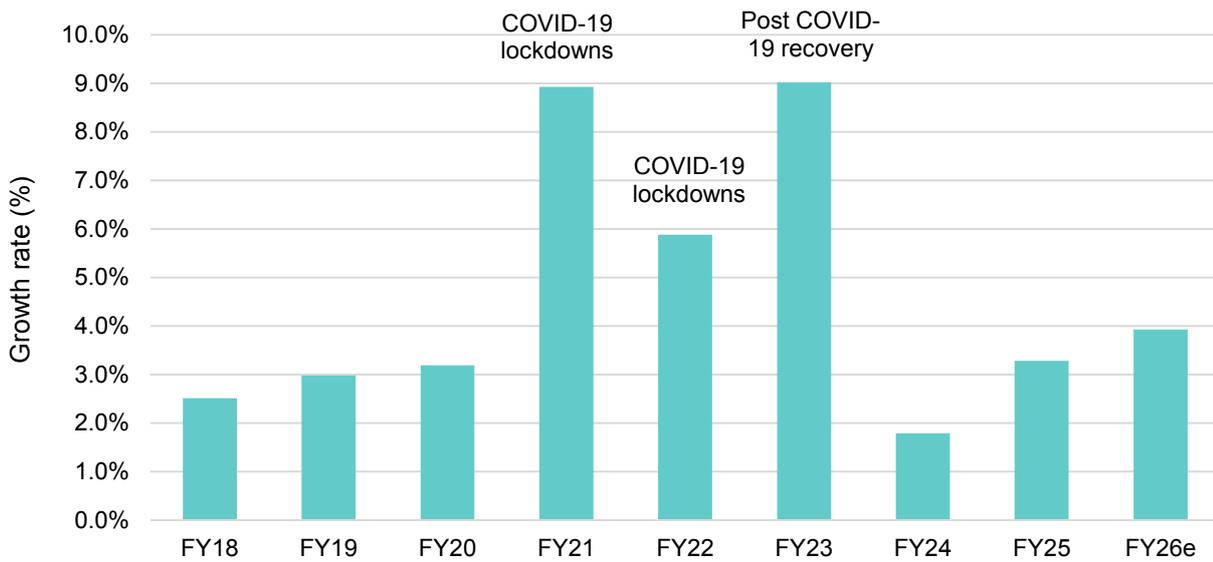
Australian retail sales growth has been on an improvement path since March 2024. Retail sales growth for FY25 was 3.3%, better than the 1.8% in FY24. We see retail spending accelerating further to 3.9% in FY26e.

Consumers had the benefit of tax cuts and strong wages growth during FY25 and Australian household income growth was close to 6.2%, which is well above trend. Even if there's interest rate cuts of ~100bps this calendar year, our forecast for household income growth drops back to 4.7% in FY26e. If retail growth is stronger than our forecast in FY26e, it is likely driven by households dipping into savings if house prices rise substantially.

Retail sale trends

There are meaningful distinctions within retail categories. Over the next 12 months, we expect the strongest acceleration in cafés, restaurants and takeaway food. Discretionary retail growth is unlikely to improve much overall. However, household goods could continue to outperform for the rest of 2025.

Figure 1: Retail sales by fiscal year



Source: ABS, MST Marquee

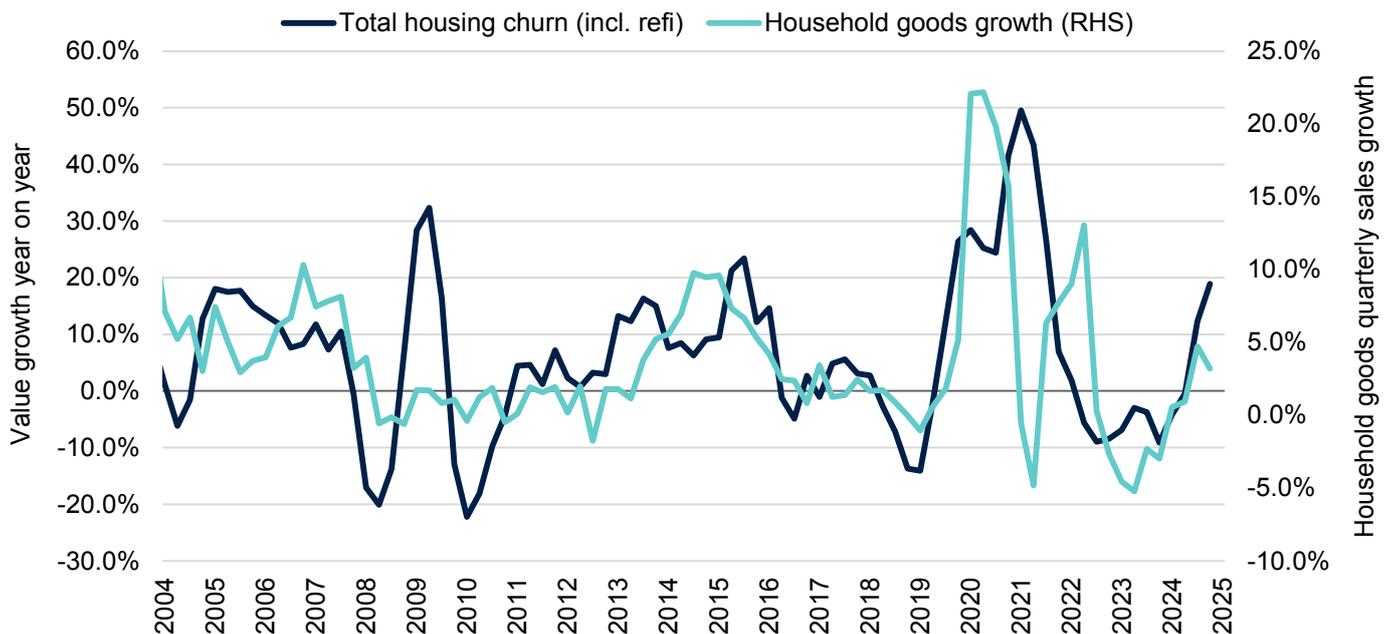
Savings rate inversely linked to wealth

If house prices rise, then household savings may fall and retail spending will be stronger. We estimate Australian household savings are at 4.3% of income for the 12 months to June 2025, which is up from 2.5% a year ago. Households have saved more money given income tax cuts and reduction in interest rates. The previous build-up of savings in 2020 and 2021 gives ammunition towards an outcome where households save less and spend more. In other words, upside risk to our retail sales forecasts. A 1% drop in the savings rate is at least a 1% improvement in retail spending, all else equal. It could be as much as a 2.5% boost to retail spending if staples spending is unchanged and the reduction in savings is only ploughed into discretionary spending.

Outlook for household goods retail

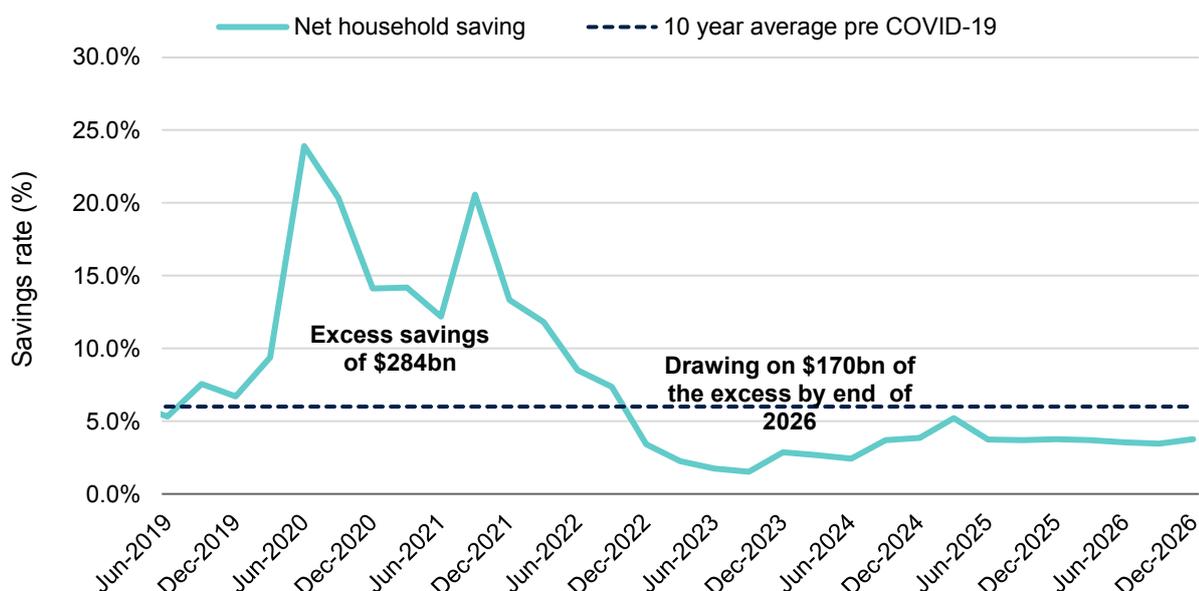
A significant swing factor on spending may be the housing market. Higher housing churn could boost spending in housing-related retail such as furniture, electronics and hardware. We closely monitor housing churn, which we define as the dollar value of loans written on housing. The loans are for new homes, existing homes, house and land packages as well as refinancing mortgages. Housing churn has stepped up to near 20% growth as at March 2025. In the chart below, we show a correlation between household goods retail and housing churn.

Figure 2: Household goods sales growth versus housing churn



Source: ABS, MST Marquee

Figure 3: Household savings rate outlook



Source: ABS, MST Marquee

A few insights on some of the retail categories include:

- **Supermarkets:** Supermarkets had subdued growth of 2.9% in FY25, well below long-term trends of 5.0%. The weakness is partly a function of tobacco sales, which may have detracted about one percentage point from growth. Moreover, the sub-sector has faced increased competition from non-supermarkets encroaching on key categories, which we expect to continue. Inflation may pick up a little as meat and fresh produce inflation have spiked, while most packaged goods categories are seeing low inflation.
- **Liquor:** Liquor retailing is in the final stages of a significant reset in volumes post Covid-19. FY25 revenue decreased by 1.0%, down from FY24 at +0.7%. Per capita volumes are down circa 5%. However, the six-year CAGR is still 6.6% from FY19-FY25. We forecast revenue growth of 3.0%.
- **Household goods:** Household goods growth has been volatile over the past 12 months. Growth has been far stronger in electronics than in furniture or hardware. The level of housing churn is accelerating and should remain higher as interest rates fall. Household goods sales rose 2.8% in FY25. A fairly quick reaction to lower rates means growth may not accelerate much further beyond 2025.
- **Pharmacy:** The pharmacy and cosmetics sector had growth of 8.5% for FY25. We estimate that over one-third of that pharmacy growth came from the growth in demand for GLP-1 drugs. We estimate around 3% of the Australian population aged over 18 is taking GLP-1 drugs like Ozempic. Given this demand will be on-going, pharmacy is likely to out-perform. However, growth may settle back towards 5%-7% over FY26e as lower CPI on prescriptions and more competition in pharmacy lowers price inflation.

If you would like a more detailed outlook for retail in 2025, request a copy of the **full Retail forecasts report** from the Retail Mosaic team by emailing craig.woolford@mstmarquee.com.au

Figure 4: Australian retail sales long-term trends

Category	1 month	3 months	12 months	25 years
Supermarkets	2.9%	3.7%	2.9%	5.0%
Liquor	-4.5%	1.0%	-1.0%	7.0%
Other specialised food	12.7%	13.6%	11.6%	3.4%
Pharmacy & cosmetics	9.5%	8.8%	8.5%	6.7%
Furniture, flooring & homewares	4.8%	2.2%	2.7%	4.1%
Electronics	7.8%	5.7%	4.3%	4.0%
Hardware & gardening	4.6%	3.2%	1.8%	5.3%
Clothing	6.2%	4.0%	3.2%	5.0%
Footwear and accessories	2.6%	2.1%	1.4%	4.1%
Department stores & DDS	5.5%	4.3%	1.6%	2.3%
Recreational goods	11.1%	8.1%	4.9%	3.6%
Takeaway food	6.0%	6.9%	3.3%	5.5%
Cafes and restaurants	1.9%	1.5%	2.1%	6.3%
Total retail (Industry)	4.6%	4.2%	3.3%	4.9%
Online Food Retailing	13.5%	13.5%	10.2%	23.1%
Online Non-Food Retailing	14.5%	8.5%	11.4%	19.9%
Online Total (Industry)	14.2%	10.0%	11.0%	20.8%

Source: ABS, MST Marquee



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HOW TO CAPITALISE ON GROWTH OPPORTUNITIES IN PHARMACY RETAIL



By Ben Dixon
CEO, Fonto



When JB Hi-fi expanded its store count in the early 1990s and 2000s, it changed the way that consumers shopped the category by abandoning polished store layouts and replacing them with a warehouse-style, no-frills format: open shelves and wooden pallets stacked high with stock, bold handwritten price tickets and loud yellow and black signage. This 'cheap and cheerful' aesthetic wasn't accidental – it signalled low prices and quick turnover that consumers responded to.

Australian consumers are in the midst of a similar change in the way that they think about shopping in pharmacies. While a busier store format and low-price focus by Chemist Warehouse have led the transformation, pharmacists have also benefited from both perceived and real supermarket pricing inflation, leading to increases in impulse purchasing and category expansion.

Pharmacy spend per customer has grown by 10.5%

The shape of growth in pharmacy 2024-25 financial year



Source: Fonto Market Metrics



The growth numbers in pharmacy retail lately have been significant. Fonto data shows that while the number of people that purchased from the category and the frequency of purchase remained consistent year on year, total spend per customer increased by 10.5%. This was powered almost entirely by a 10.4% increase in the average basket size.

In other categories where Fonto monitors consumer spending, what typically happens when average basket prices increase significantly over time are a medium-term decline in repeat customer spending. In pharmacy, this has not been the case.

Change in customer expectation

It's no secret that Chemist Warehouse's store format and lower-price expectation has been key to its success. The comparisons to JB Hi-fi's shift in consumer electronics are obvious, creating a sense of urgency and bargain hunting while in-store, with impulse purchasing prevalent in addition to whatever mission brought the customer to the store. The impact was so significant in the 2024-'25 financial year that Chemist Warehouse customers increased their spend by more than 17%, accounting for a significant proportion of the 10% category level growth. This was primarily achieved by repeat visitation – while frequency of purchase for the whole category barely changed year on year, it grew by 8% for Chemist Warehouse, with customers buying from them more than 8.5 times throughout the financial year.

Were the supermarkets right?

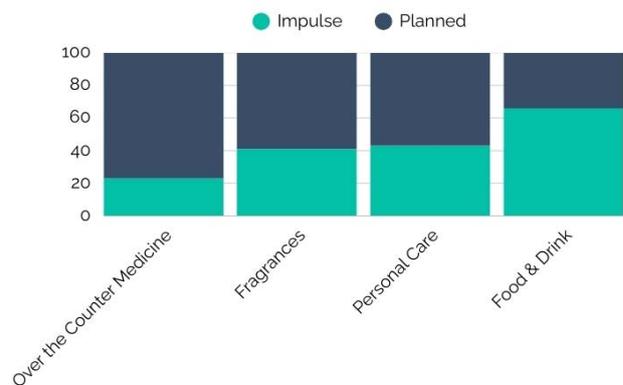
On multiple occasions during the ACCC's Supermarkets Inquiry in 2024-'25, the major supermarkets referenced revenue losses incurred directly to online retail and to the pharmacy sector. In March, The Australian uncovered a \$500 million loss of Coles revenue in personal care, health and beauty to non-grocery competitors, including Chemist Warehouse.

We started asking our members about this change in purchasing behaviour a few months ago, and the results are telling. When purchasing specific items from pharmacies that may have otherwise been bought from a supermarket, pharmacy, shoppers stated that the three main reasons they were doing so were price, convenience and product availability.

Accordingly, health and beauty has emerged as a key battleground, with multiple retailers calling out for the need to expand range and share in the space.

THE IMPORTANCE OF IMPULSE

Planned vs impulse purchases by category in pharmacy



Source: Fonto Moments in Pharmacy



As consumers change their shopping habits in pharmacy, adjusting store layouts and product range will be key to capturing growth. We spoke recently with one retailer who commented that sales of fragrances were not a high priority for their store format. We then presented recent data highlighting that more than 41% of people who had purchased fragrances from a pharmacy did so on impulse, helping them to rethink this approach.

There are similar results for personal care items (43%), and food and drink, with more than two-thirds being purchased spontaneously. This has potential implications for improving store layouts, pharmacy checkout designs and product selection to capture sales growth. Even one in five (23%) purchases of over-the-counter medicines were done on impulse, indicating a consumer habit of either stocking up, or following price and promotion cycles.



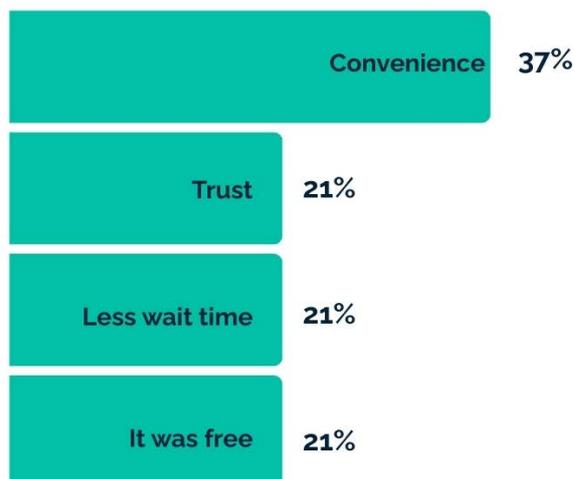
Brand marketing matters

If you've ever wondered whether brand marketing works, there is evidence that the brand differentiation among top pharmacy brands plays a leading role in shaping retail choice for shoppers. After making a pharmacy purchase, Fomento asked those customers why they had chosen to shop at that specific store. The top responses for each of the top three brands closely reflected their brand promises, with Chemist Warehouse customers citing better prices (42%), Priceline customers citing product availability and range (32%), and TerryWhite Chemmart customers selecting them for ease of ordering, locating what they needed (60%).

The growth implications are clear: having a clear brand promise and then delivering on that is helping larger retailers capitalise on the change in shopping behaviour, while independents and others are racing to catch up. Aligning that brand promise to the subtle shift of items from supermarket shopping trolleys to pharmacy baskets also carries higher potential for growth.

Worth watching: health services

Health checks, vaccines and health advice: Why did you go to the pharmacist instead of your GP?



Source: Fomento Moments in Pharmacy



A final area of growth worth watching is the use of health services in pharmacies. This may include getting blood tests, vaccinations or various kinds of health advice. When asked why they had done so at pharmacies instead of their GP, top responses included convenience (37%), trust (21%), reduced wait-time (21%) and price (21%).

With telehealth and other appointment-based health services being trialled by many in the sector, the continued consumer feedback around convenience and expediency may create further opportunities for growth as Aussies look elsewhere to access basic services from trusted advisors.

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SHAPE THE FUTURE OF RETAIL

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The Activate Industry Report is more than a publication—it's a platform for shaping the dialogue of modern retail. It connects retailers, suppliers, and emerging leaders with a community committed to collaboration, recognition, and purposeful change.

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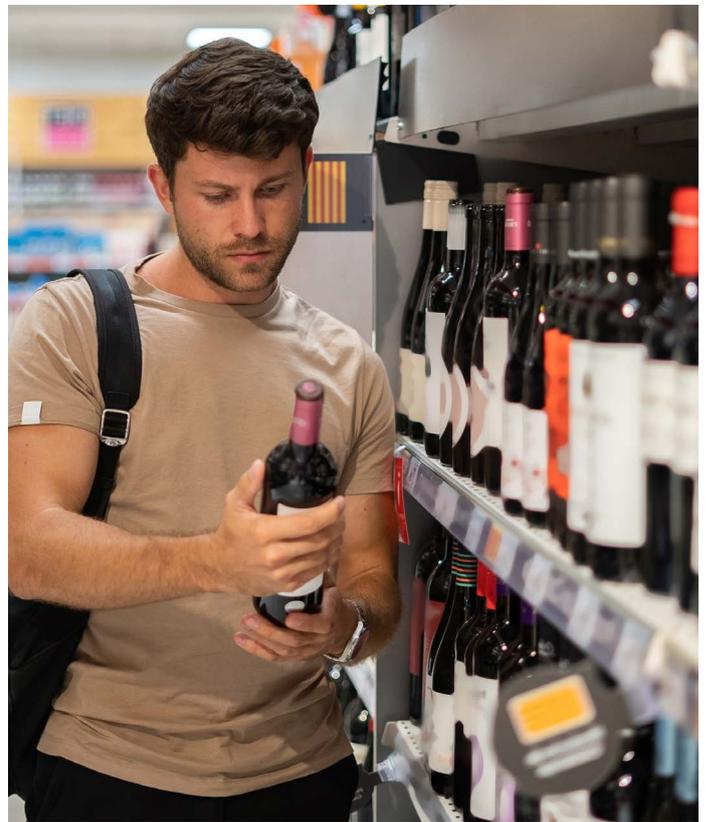
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MIND THE GAP

Closing the divide between younger and older liquor shoppers



By David Shukri
*Client Service Director,
Shopper Intelligence*

Somewhere in Sydney there's a liquor store with an unusual banner outside that reads, 'If you have time to browse, treat us like you would a library'.

Thinking about that for a moment, it's either marketing genius or an unintentional nod to one of the underlying problems facing off-premise liquor today.

You see, the liquor market is in a curious position. On the one hand, sales are under pressure. According to the ABS, sales value fell by 1.6% in the 12 months to March 2025, while grocery stores saw growth of 2.5% over the same period.

On the other hand, shopper satisfaction in liquor has improved. In its annual update, Shopper Intelligence, which has tracked perceptions of the channel for more than a decade, reported that, overall, satisfaction has risen to 70%. That's the highest score since 2021, and an 8% lift on a year ago.

So, should the industry feel confident? In the short term, yes. But beneath the positive headline lies a bigger challenge.

For one thing, the satisfaction gains are not even across all age groups. Younger shoppers — those under 40 — are now markedly less satisfied than older cohorts, and it's the first time we've seen such a big gap in this direction.

They're looking for something different from the channel and, right now, they don't believe it's being delivered. If the gap between younger and older shoppers is not closed, or at least greatly narrowed, the channel risks alienating the very shoppers who will shape its future.

That tension between short-term gains and long-term risk could define today's liquor market.

Positives in the market

The clearest bright spot is that shoppers are feeling better about the overall experience. Satisfaction has bounced back after several years of decline, and the results in the year to March 2025 put liquor on par with grocery for the first time in years. For an industry so inextricably linked to experiences, that matters.

"There's a huge opportunity up for grabs, but the question is, who is up for grabbing it?"

Digging deeper, three areas stand out. Perceptions of premium products have improved the most out of any satisfaction measure. Shoppers are giving more credit for ranges that feel of higher quality, more authentic and more in tune with health trends. This indicates shoppers will trade up when the benefit is articulated and the value for money is clear.

We also see the continued growth of the 'occasion mindset'. Four in 10 shoppers say they had a specific occasion in mind when buying liquor, and that's increasing across all groups. A more diverse range of categories are in consideration nowadays for social and meal occasions, and there is huge opportunity for suppliers and retailers to dial up their collective messaging around occasions.

For both retailers and suppliers, these positives show there is room to build. Satisfaction is improving, shoppers are noticing good quality more, and occasions remain central to how people shop the category.

Challenges to address

For all the progress, two significant challenges stand out. The first is brand cut-through. Shoppers are planning their liquor trips as often as ever, but fewer are following through with the brand they had in mind pre-store.

In 2025, just 42% of shoppers who intended to buy a specific brand went on to buy that brand. That's down six points in a single year. Very often, it's easier for shoppers to grab what's on promotion than to take the extra time to investigate ranges more fully and find what they had originally had in mind.

Offers and deals are obviously important, but too much noise on price risks turning categories into commodities and leaving value on the table. For suppliers, that erodes equity. For retailers, it reduces differentiation. The second challenge is that widening gap in satisfaction between younger and older shoppers. Older cohorts are broadly happy, particularly with execution in-store. But shoppers aged under 40 are more critical. They are less satisfied with product attributes and less convinced by what they see on-shelf.

At the same time, they're more purposeful. Under 40s are more likely to shop for a particular occasion, often linked to food or socialising. They

want authenticity, healthier options, and clear product information. When those needs aren't met, they feel it more acutely than older shoppers.

There's a huge opportunity up for grabs, but the question is, who is up for grabbing it?

Actions for 2026

So, let's finish with three actions for retailers and suppliers based on what shoppers are saying. What do they want to see change in the off-premise in 2026?

1. Rebalance reliance on promotions with stronger brand stories.

The slide in brand conversion is a challenge for everyone in the market. Promotions will always play a role, but shoppers need more than price cues. Clearer storytelling that plays out both before the trip and at the shelf, will help rebuild brand cut-through. This means consistent messaging across digital, advertising and in-store activation, so that the planned brand makes it into the basket.

2. Address the needs of younger shoppers directly.

Under 40s want different things. They want to know what makes a product right for them and they don't want to spend time trying to work that out. Sure, they love product innovation, but they want it presented to them more clearly without losing visibility of their favourites. Fixing the basics of layout and clarity is a start, but the bigger opportunity is in making these shoppers feel the off-prem aligns with their broader lifestyle expectations. If they don't feel seen, they will disengage.

3. Strengthen collaboration to connect execution with strategy.

Many of the challenges we face, from brand switching to shelf frustration, are best addressed when retailers and suppliers work more closely together. That means aligning category roles with execution, ensuring new product innovation is easy to find and tailoring activations to different shopper groups. Execution works for older shoppers today, but younger shoppers need a shift. Closing that gap requires joint planning and shared accountability.

Taken together, these actions aren't about reinventing the wheel. They are about fine-tuning the balance between short-term sales levers and long-term equity. The pay-off is a channel that can hold on to today's gains and build stronger loyalty with tomorrow's shoppers.

So, are you ready to be brave and give shoppers a reason to choose, not just to browse?

"So, are you ready to be brave and give shoppers a reason to choose, not just to browse?"



INNOVATION FATIGUE: WHY FMCG NEEDS SMARTER, FASTER PRODUCT VALIDATION



By Sam Gilding
Product Intelligence Expert, Vypr

Innovation sits at the heart of the FMCG world. It's how brands grow, stay ahead of competition, and remain relevant to consumers. But lately, the pace of consumer change is speeding up, budgets are tighter, and the stakes for every new launch are rising. Unsurprisingly, teams are starting to feel the strain. That's what we call 'innovation fatigue'.

The answer isn't to pull back on innovation, however. It's to approach it more intelligently.

Why innovation fatigue is real

The speed of consumer behaviour is outpacing many companies' ability to keep up. Shoppers are more informed, demanding, and willing to switch. At the same time, many businesses are still relying on slow, expensive and outdated tools to validate innovation.

The result? Opportunities are missed and too many products either underperform or never make it past the ideation stage.

So, **95% of new products fail within their first year**. That's not just a missed chance, it's a cost in time, money and energy and, when a team puts its all into developing something new, only to see it fail, it impacts budgets and affects confidence.

The broken validation model

Most teams aren't struggling for ideas. The problem is how those ideas get tested. Businesses spend months building out concepts, only to test them right at the end. By that stage, the product, positioning, packaging and budget has been committed to. Testing becomes a formality, rather than a meaningful check-in.

Traditional research is also slow and expensive. Think long surveys, in-person interviews and focus groups. **These methods can take 18-24 months from idea to shelf.** When consumer needs are shifting weekly, that delay can mean missing the moment entirely.

A smarter way forward: agile innovation

There's a better way to approach this. **A way that gives you more flexibility, faster answers, higher success rates and increased ROI of around 185%.** It's called 'agile innovation'.

Put simply, it means validating with consumers at multiple points throughout the development process. Rather than waiting until the end, you run quick, targeted tests from the start. Each stage becomes a chance to refine, adapt, and move forward with confidence. In today's financial climate, the speed and accuracy of agile innovation is a must.

Here's what that looks like:

1. Concept: What is the product? Why does it exist?

This is the foundation. If you're not solving a real consumer need, no amount of branding or marketing will save the idea. **Concept testing helps you validate demand and direction before investing heavily in development.**

2. Claim: What are you saying about the product? Does the messaging connect?

72% of consumers rely on front-of-pack claims when deciding what to buy. Testing messaging can help you land on the one that reflects what consumers care about.

3. Packaging: Does it stand out on-shelf? Is it appealing?

Packaging is often the first interaction someone will have with your product. **A study by Meyers found that 72% of shoppers are influenced by packaging design.** Testing this early can help make sure your design is effective.

4. Pricing: What's the right price? Does it reflect the product's value?

Post-Covid and rising living costs, Australians are more price-sensitive than ever. In fact, **57% say they're checking prices more often.** Although, **10% are still happy to pay more for products that meet their needs.** **Pricing research helps you find that sweet spot between value and margin.**

Together, these stages form a more agile approach to product development. You get clearer feedback, increase speed to market, and **cut down development costs by up to 90%.**

Why agile innovation works

Using agile innovation, you swap guesswork for insight. You don't have to wait to launch to know whether it's going to work. You make smarter, faster decisions with live consumer feedback, and not just gut feel or outdated research.

This leads to:

- **25% faster time to market** by catching issues before they become costly.
- 50% higher product success rates, with real consumer input at every stage.
- More alignment across teams as decisions are backed by shared evidence.

It means you're not launching on assumptions, you're launching with clarity.

Common myths that hold teams back

Some people worry that doing more testing will slow things down or compromise quality, but that's not what happens. Here are some common misconceptions:

"We already do consumer testing"

That may be true, but is it happening early or often enough to shape the outcome? Or does it confirm decisions that have already been made?

"Fast research means low-quality insight"

Not when it's done right. Tools such as Vypr give you access to robust, nationally representative panels, so **you get high-quality feedback in as little as 24-48 hours.**

"We can't afford to keep running research"

Teams that use Agile Innovation reduce their development timelines by around 25% while avoiding the costs of last-minute fixes or failed launches.

Rethinking innovation culture

When you give teams the tools to move quickly and test confidently, you replace frustration with momentum. This approach doesn't just improve individual products, it lifts the whole innovation culture. Teams feel more empowered, meaning ideas move faster, matching the ever-evolving consumer wants and needs.

In a market that keeps changing, FMCG brands need more than good ideas. They need a better process that's built for speed, insight and continuous learning. So, test early, learn often and launch with confidence.

SHINING A LIGHT ON RETAIL LEASING: HOW DATA EMPOWERS TENANTS



By Mark Raphael
Founder & CEO,
Lighthouse Insights



For too long, retailers have been asked to negotiate their leases in the dark. Landlords, armed with extensive portfolios and reams of data, walk into negotiations with the confidence that comes from knowledge. Tenants, on the other hand, often arrive relying on instinct, incomplete anecdotes, or dated advice. The result? Businesses can end up locked into paying above-market rents, absorbing unfavourable terms, and carrying unnecessary risks.

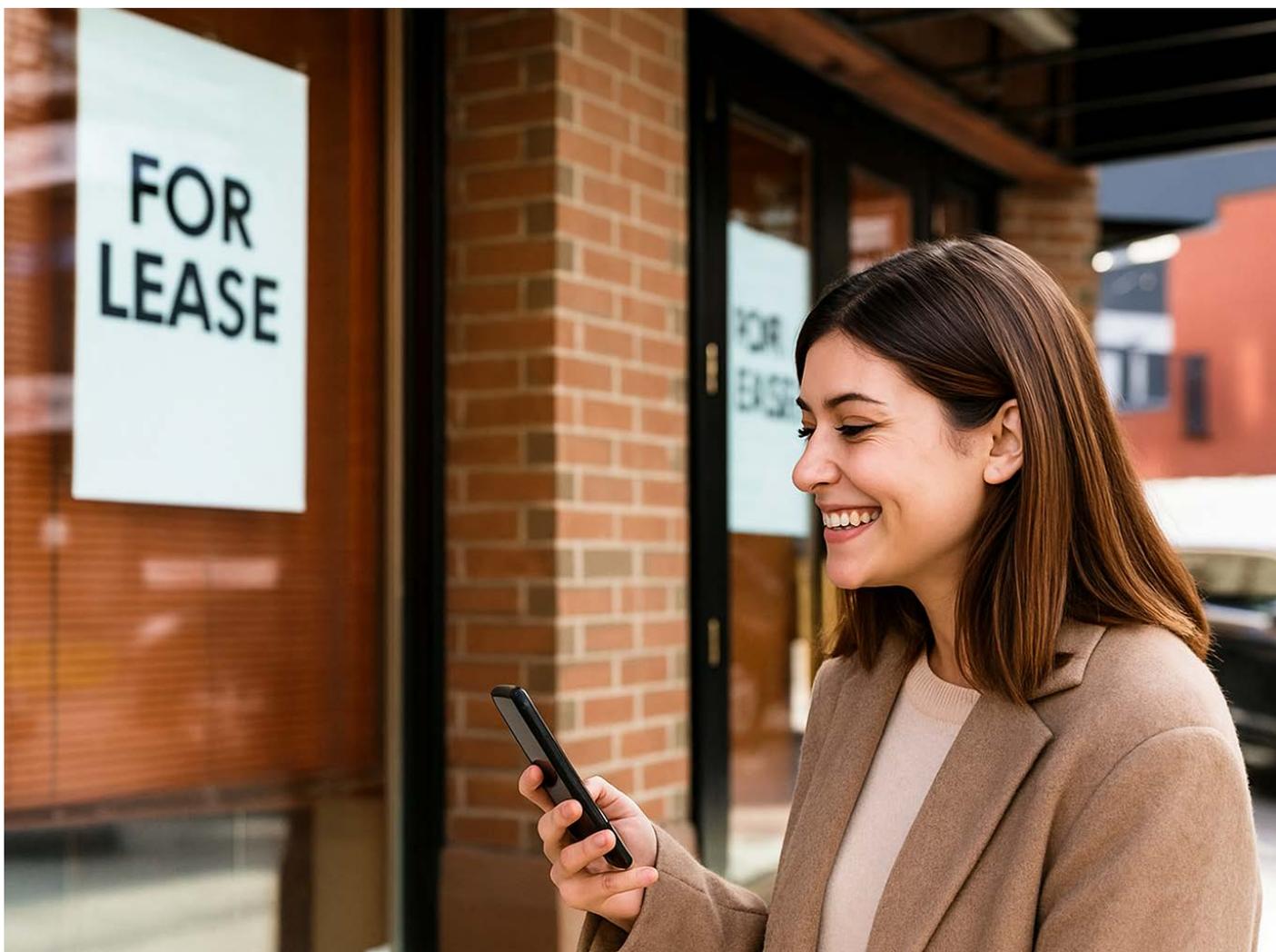
It doesn't need to be this way. Just as technology has transformed retail operations, supply chains, and customer engagement, data is now transforming commercial leasing. By equipping tenants with current, relevant, and accurate market insights, retailers can negotiate smarter, manage their portfolios more efficiently, and protect their businesses from avoidable risks.

The Problem: Retailers Negotiating Blindfolded

Retail leases are among the biggest costs to a retailer, often second only to wages. The terms of a lease can determine whether a location thrives or fails. Yet when it comes time to renew, expand, or manage ongoing obligations, most tenants lack access to the type of reliable data that would enable truly informed decisions.

Landlords often know exactly what rent tenants are paying and may have insight into sales across a centre or even an entire region. This allows them to benchmark performance, identify the highest rents being achieved, and use that knowledge to their advantage. By contrast, tenants frequently have no visibility beyond their own lease. Without market data, many accept terms that can weaken profitability for years.

Negotiating without the right data is like running a race blindfolded—you might finish, but chances are you'll pay for it along the way.



The Solution: Data-Driven Decisions

Access to benchmarked information on rents, sales, traffic, and lease terms changes the dynamic entirely. Instead of guessing, tenants can enter negotiations with evidence of what is fair and achievable. This not only levels the playing field with landlords but also ensures more sustainable outcomes.

For example, one retail group used comparative data to measure its current rental obligations against similar sites. The result was a saving of more than \$60,000 per year—funds that could then be reinvested into staff, customer experience, and long-term business stability.

Beyond individual deals, data empowers businesses to manage entire lease portfolios more effectively. From tracking critical dates so no option is ever missed, to benchmarking key performance indicators against industry averages, the clarity provided by data brings confidence to a historically opaque process.

Strength in Numbers

The real strength of data lies not only in individual insights but in the collective power it represents. When tenants share anonymised data points, the entire retail community becomes stronger. Alone, a tenant negotiates with limited visibility; together, through shared insights, retailers can approach landlords with the collective leverage of thousands.

This shift creates transparency, changes the conversation, and ensures that negotiations are grounded in truth—not assumptions or half-truths. It's not about pushing landlords into a corner, but about establishing fairness and sustainability for both sides.

The Future of Retail Leasing

Retail is in the midst of profound change. Consumer behaviour is evolving, online competition is intensifying, and operating costs continue to climb. In such an environment, no retailer can afford unnecessary costs or unfavourable lease terms.

Data-driven decision-making is already standard practice in marketing, logistics, and finance—it's time leasing caught up. The future belongs to those who embrace transparency, collaboration, and technology. After all, a well-operated, profitable retailer makes for a sustainable, long-term tenant. There are no winners when unrealistic terms prevail.

The path forward is clear: shining a light on data ensures no retailer has to walk blind again.

To learn more about how data can support your lease negotiations and portfolio management, visit [Lighthouse Insights](#).



THE QUIET REVOLUTION IN AISLE THREE



By Simone Heath
CEO, Creative Activation

Anyone who's spent time in a supermarket knows this simple truth: shelves never stay perfect for long.

A promotion sells through by midday. A carton of stock gets left in the storeroom. Labels curl, displays shift, facings disappear.

For years, field teams have been playing a never-ending game of catch-up. Spotting issues, logging them, fixing them, then moving to the next aisle to start all over again.

Now, image recognition is changing that rhythm. Problems that once relied on a sharp pair of human eyes can be flagged and solved in real time. What used to be a reactive process has become proactive, and that's quietly rewriting how retail activation works.

At its core, image recognition is a deceptively simple idea: using AI to interpret what a camera sees. Point a device at a shelf, and it doesn't just take a picture, it reads it too. It identifies which products are present, which are missing, whether the display matches the planogram, and if promotions are executed correctly.

For field teams, this is transformative.

Tasks that once required painstaking manual checks are reduced to seconds. But the real impact goes beyond how fast it is. By automating the basics, the technology frees people up to do what they do best: problem-solve, connect with store managers, and focus on driving real value. The very real and very important 'human' element that no algorithm can replace.

The immediate gains, faster audits, fewer errors, more productive teams, are powerful. But where image recognition really earns its place is in the intelligence it unlocks.

Every shelf scan creates a granular snapshot: SKU by SKU, store by store, captured in real time. That data builds a live map of retail performance that goes far deeper than any traditional audit.

For suppliers, this means not just knowing that a product is out of stock, but seeing the sales opportunity lost as a direct result. For retailers, it provides accurate, granular detail and therefore the clarity needed to act quickly and collaboratively.

Conversations that once circled around compliance now focus on growth. Instead of "Our out of stock numbers are too high," the dialogue shifts to "Here's where we're leaving money on the table" and here's how we can fix it together." That's a profound shift in tone, and one that elevates field marketing from operational support to strategic partner.

LinkedIn will reveal there's a common fear that technologies like AI remove that human element. But in practice, image recognition has the opposite effect. By taking repetitive, time-consuming tasks off the table, it allows field teams to step into a more valuable role.

Merchandisers aren't just counting products anymore; they're interpreting data, applying judgement, and engaging with store staff in more meaningful ways. Managers gain better visibility, which builds accountability and ownership. And suppliers see a stronger return on investment, not because people are replaced, but because they're empowered.

Put simply: the technology sharpens the eyes, but it's still people who bring the insight.

The difference this makes on the ground is clear. With image recognition embedded into daily fieldwork, accuracy improves dramatically. Issues are flagged earlier and resolved faster. Teams move through stores more efficiently, but also with more purpose.

One client described it as "lifting the fog." Where before, decisions were made on patchy or delayed reports, now they're based on live, evidence-backed insights. Retailers appreciate the clarity. Brands appreciate the agility. And shoppers, though they'll never know the systems at play, simply find the products they came for, when they want them.

The real power of image recognition lies in the detail. When you can see exactly which SKU's are missing, in which stores, at which time, you move beyond general observations into evidence-based action.

That level of granularity allows suppliers to enter retailer discussions with confidence. It turns difficult conversations into constructive ones, because the data isn't anecdotal, it's entirely objective. And that builds trust on both sides.

For many clients, this has reshaped their view of field marketing. No longer a cost centre focused purely on execution, it's become a source of intelligence driving category growth.

The technology itself is still evolving. On-device AI is one of the most promising shifts, enabling recognition to happen instantly without reliance on connectivity. With turnaround times averaging 5 to 10 seconds per bay, a field representative can have full visibility of planogram compliance and out of stocks in a 6 bay category in under a minute. That means no lag time, no dropped uploads, just immediate results in the aisle

Beyond that lies predictive capability. If today's tools can tell us what's on the shelf, we can utilise data to anticipate what won't be. Forecasting out-of-stocks before they happen, or predicting which promotions will need extra support. Paired with shopper behaviour data, it will offer a complete picture: not just what's happening in the store, but why it matters at checkout.

The shelf, in other words, is on its way to becoming intelligent. And with intelligence comes foresight.

At Creative Activation, we've seen how these shifts translate in practice. Rolling out image recognition has improved accuracy in identifying issues, reduced the time to correct shelf standards, and elevated productivity across the board. Predictive analytics arms the team to make decisions and optimise when and how they visit stores that need it the most.

But perhaps more importantly, it's changed the way we work with clients and retailers. With richer data in hand, we're helping reshape strategies, uncover missed opportunities, and strengthen partnerships across the value chain.

The technology may be the enabler, but the impact is felt in the relationships it supports and the results it drives.

Retail has always been about details. the placement of a label, the availability of a single SKU, the consistency of a display. What image recognition offers is the ability to see those details more clearly, more quickly, and with more context than ever before.

It doesn't shout for attention. It doesn't dominate headlines. But quietly, it's reshaping the everyday work of our field teams, the conversations between brands and retailers, and the experiences of shoppers in the aisle.

Shelves will never be perfect. But with the right tools, they can be smarter.

That might just be the most important shift in retail activation yet.



DESIGNING TOMORROW:

How AI is Shaping Packaging, Retail, and Shopper Experiences



By Tyler Franko
Dynamic Code

The signal, not the noise

AI is already reshaping FMCG. The question for Australian food and beverage leaders is how to translate it into growth you can measure. Think packaging that pulls its weight beyond the shelf. Stores that predict demand and fix availability before anyone notices. Shopper experiences that feel personal without feeling creepy. Over the next one to five years, that becomes the baseline, not the edge case.

Packaging that does more than look good

Two shifts matter most.

1) Connected packs as a product layer.

GS1's move to "next-gen" 2D barcodes means a single on-pack code can unlock provenance, allergens, promotions, usage content, and recall data from one scan. This is rolling out globally with an industry "Sunrise 2027" target for retail POS to scan 2D as standard. Australian brands can move now and use GS1 Digital Link to route shoppers to dynamic experiences that you can optimise in real time.

2) AI in materials, artwork, and sustainability.

Generative tools are speeding up concepting and variant testing. The next step is AI helping pick better materials and structures, not just prettier graphics. Nestlé's R&D work with IBM to identify new high-barrier materials is a good signal of where this goes. The point is faster iteration, lower waste, and designs that protect product while meeting recyclability goals.

In Australia, the packaging context is shifting too. APCO's ARL continues to push clear disposal guidance. With REDcycle and "return to store" labels being phased out, connected packs are the cleanest path to give updated recycling instructions by product and postcode. Treat the pack as an owned media channel that stays accurate even when the rules change.

What to pilot in the next 6 months

- Add a GS1 Digital Link QR to one hero SKU. Start with provenance, recipe content, and a simple reward or club sign-up.
- Use AI to stress-test two packaging routes against briefed shopper segments and brand codes before you brief the studio.
- Build a lightweight "connected packaging" dashboard so marketing, insights, and supply can see scan rates, content engagement, and service tickets in one place.

Retail that runs lean and feels fast

Australian grocers are already live with smarter hardware, sensors, and AI at the edge.

- **Smart trolleys** are moving from pilot to rollout. Coles is deploying Instacart's Caper Carts in Melbourne. They scan, weigh produce, track spend, and allow payment on the trolley. Woolworths has expanded its Scan&Go trolleys with Hanshow from an initial NSW pilot to more stores across NSW, VIC, and QLD. Expect rapid learnings on UX, promotions, and the queue-busting impact on NPS.
- **Electronic shelf labels** are now mainstream. They cut price change labour and errors and set the stage for programmatic promotions by daypart or store zone. Local reporting has highlighted their growth and addressed concerns about surge pricing. Australian majors say accuracy and efficiency are the driver, not price gouging.
- **Predictive supply** is where the margin sits. Coles has already flagged AI forecasting for liquor, using events, weather, and promotional signals to improve availability. Similar models on fresh, beverages, and snacking shrink waste and lift on-shelf availability when it matters most.
- **Computer vision for shelf health** is graduating from trials to enterprise tools. Vision models detect gaps, mis-facing, and promotion compliance, then push tasks to team devices. The result is fewer lost sales and tighter execution on paid displays.

What to pilot in the next 6 months

- One category, five stores, rolling four-week test. Pair ESLs with rules-based offers that respect price trust. Measure uplift and team time saved.
- Deploy a camera-based shelf check in a top 50 store for one high-velocity aisle. Track lost sales recovered and compliance.
- Link store-level demand forecasts to supplier order cadences in one joint business plan so both sides win on service level and working capital.

Shopper experiences that actually feel helpful

Personalisation is moving from "email first name" to "useful in the aisle".

- **Retail media with real reach.** Woolworths' Cartology and Coles 360 let brands run audiences built from first-party shop data across in-store screens, apps, and off-platform channels. The big change ahead is creative that adapts by store, mission, and weather. That is where AI earns its keep, not by making more assets but by making the right ones.

- **Shoppers are warming to AI when it saves time or money.** Adyen's 2025 Retail Report found roughly a third of Australians now use AI to shop, with the fastest growth among Gen X and Boomers. Handy when you are arguing for budget to make these experiences real.
- **Privacy will shape design choices.** Australia's privacy reforms and the ACCC's final Digital Platform Services Inquiry raise the bar on consent, fairness, and data use. Plan for explicit opt-ins, clear value exchange, and privacy impact assessments for in-store tracking or location-based media. Getting ahead of this beats a retrofit later.

What to pilot in the next 6 months

- Build a simple "journey brain" that picks the best message by store, weather, and basket. Prove it on one brand and one retail media partner.
- Run a consented value exchange test. Offer better pricing, faster shop, or exclusive content for explicit permission to personalise in-store.
- Add a conversational layer in your app for missions like "BBQ for six under \$60" or "lunchbox planning in five minutes". Tie it to real stock.

A five-year view, localised for Australia

Here is the likely path if you start now.

Year 1-2

- Every hero SKU has a smart code with useful content and a measurable engagement loop.
- ESL coverage expands across major metros. Promotions become more responsive to weather and local events.
- Retail media plans combine in-store screens, owned digital, and off-platform reach with shared MMM and incrementality standards.

Year 3-4

- Smart carts and vision systems reduce friction and improve availability without hurting trust.
- Packaging moves from one-off campaigns to ongoing services. Think refills, loyalty, service tickets, and warranties routed through the code.
- Joint forecasting with key retailers tightens. Suppliers build flexible production and logistics to respond.

Year 5

- 2D at POS is normal. Consumers expect scan-to-know and scan-to-save on pack.
- Creative becomes adaptive by default. Campaigns are planned as systems, not flights.
- Compliance and consent are table stakes. Brands that respected privacy from the start enjoy stronger loyalty and lower legal risk.

Last word

AI is not here to replace brand building or retail basics. It is here to remove drag, unlock speed, and help you show up for shoppers at the right moment. In Australia, the pieces are on the board already. Smart trolleys and ESLs are live. 2D barcodes are coming to checkout. Retail media has real reach. Privacy rules are tightening.

The brands that win will treat AI as a collaborator, not a gimmick. Start focused. Measure everything. Scale what works. Let's build something useful and get it into the hands of shoppers.



THE DEATH OF THE HANDSHAKE:

Rebuilding trust for innovation in Australian retail.



By James Gardner
*Senior Operations & Strategy Consultant,
Joe Berry Award Finalist*

Australian retail faces a chronic underinvestment in disruptive innovation¹ which threatens its future. Customers increasingly choose lower-margin private label products over national brands², leading to stagnant industry growth³ and shrinking margins⁴. This market, driven primarily by price due to a lack of meaningful differentiation, fosters a 'race to the bottom'. At the core is a broken motivation equation where perceived risks of new product development outweigh potential rewards thus stifling disruptive innovation⁵. This imbalance stems from a pervasive lack of trust and short-term collaborations in retailer-supplier relationships⁶, putting livelihoods across the sector at risk. Addressing this imbalance in the innovation investment landscape is critical.

The blueprint of trust: when handshakes last

The enduring power of trust, symbolised by a handshake, offers a blueprint for a thriving retail landscape. A prime example is a 20+-year partnership between a perishables supplier and one of Australia's leading retailers. A pivotal early 2000s handshake agreement allowed this supplier to grow from under \$10 million to over \$100 million turnover, eventually dominating their business. Emboldened by a handshake agreement, a major investment in a new factory was made without formal contracts in place which would delay progress and alter the relationship dynamic⁷. Consistency in key personnel within the retailer further fostered this confidence. Even during challenging periods, such as Covid-19, retailer support was provided, allowing time to rectify service-level issues rather than immediately reducing listings. The CEO of the supplier stresses the reciprocal nature of this trust, where both parties consistently 'do what you say you're going to do'.

On a similar note, Woolworths South Africa fosters trust through joint planning and "generous five+-year supply agreements" with key innovation partners⁸. This long-term commitment encourages significant infrastructure investments from suppliers, backed by volume commitments and executive-level sign-offs from CEOs and general managers. This shared investment model results in an exceptionally high success rate for their innovation with 70-80% of products still on-shelf 12 months

post-launch. Individual product failures 'do not equate to the failure of the partnership', allowing for continuous innovation and 'big-bets'. This approach enables suppliers such as Rhodes to maintain guaranteed distribution points for innovation, even when individual products fail, encouraging them to keep '20-30 products in the wings'. Rhodes has a 20+-year enduring partnership with Woolworths South Africa⁹.

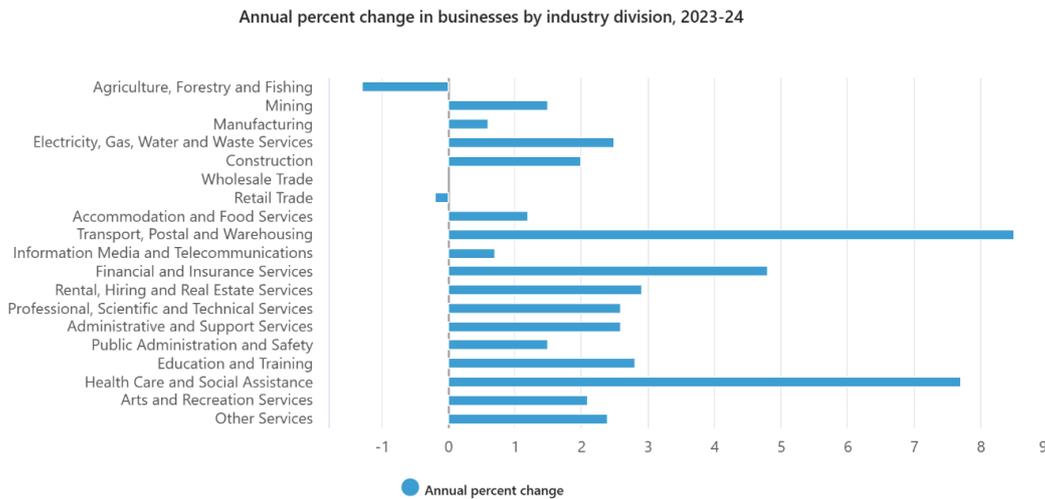
The cost of distrust: a cycle of underinvestment

Despite the clear benefit of these partnerships, the broader Australian FMCG sector faces a significant breakdown of trust and 'short-termism' in supply agreements. Primary causes include 1) the entry of discount retailers in the past decade, 2) changing market dynamics [rapid consumer trend shifts, supply chain volatility], and 3) the introduction of UK-originated-leadership teams where transactional relationships emerged earlier¹⁰.

Together, these prompted major retailers like Coles and Woolworths to 'stringently manage their purchasing costs from suppliers'¹¹ leading to a stark decline in supplier profitability. Specifically, profits fell from \$8 billion to \$5 billion between 2010 and 2019, with much of the initial change experienced between F10-F13¹². This "artificial suppression of prices", while benefiting customers in the short term, strained suppliers, eroded trust, and resulted in 'no real growth in ... investment in the industry'. Consequently, it is unsurprising that businesses are failing; Retail trade saw a net reduction in the number of active businesses between 2023 and 2024¹³ (See Figure 1).

Taking a deeper look at this 'short-termism', we can point towards the prevalent norm of 12-month supply agreements in Australia coupled with retailer category managers often changing roles every six-12 months (rarely exceeding two to three years)¹⁴. With such short tenures, retail managers are 'not incentivised to support bold, disruptive innovation for future trends'¹⁵ as they anticipate being in a different role by the time such innovations mature.

Figure 1: Retail trade saw a net reduction in the number of active businesses between 2023 and 2024 – ABS



Source: Australian Bureau of Statistics, Counts of Australian Businesses, including Entries and Exits July 2020 - June 2024

Consequently, many suppliers feel ‘burnt by past experiences, and the short contractual window directly discourages supplier investment in disruptive innovation. Manufacturers are hesitant to bear the sole risk without security in longer-term returns¹⁶. They face substantial risks: sunk costs in under-utilised capital, expensive raw ingredients, diminished unit pricing from trial volumes and fear of public brand damage if innovations fail¹⁷.

Taking a different angle, the difficulty suppliers face in obtaining robust reporting and attribution from retail media networks accentuates the common thematic on lack of transparency and trust, impeding justified investment in these critical channels¹⁸. Furthermore, Australia’s highly concentrated retail market, with Coles and Woolworths holding a combined 65% market share, further accentuate the trust imbalance.

Rebuilding trust through deeper partnerships

To counter the declines in margin and protect revenue growth, Australian retail must address the lack of investment in innovation. This necessitates a focus on increasing the reward and dropping the risk associated with innovation, requiring shared responsibility between retailers & manufacturers and a significant shift towards deeper, more collaborative partnerships:

- Longer-term supply agreements and strategic alliances: while the Australian norm is the 12-month supply agreement, longer supply agreements with a minimum of three-five years are crucial. These provide suppliers with the confidence to invest capital, knowing they have guaranteed distribution points to facilitate long-term returns.
- Elevated conversations: agreements on strategic innovation pipelines and longer-term agreements need to occur at higher levels within both retailer and manufacturing organisations. Account managers, with their short tenures and focus on immediate financials, are often ‘ill-equipped to drive these conversations during routine range reviews¹⁹. Instead, CEOs, chief commercial officers, or similar senior executives with longer tenures and greater authority need to be involved.
- Changing DOAs for retailers: retailers must be bold and change DOAs (delegations of authority) to approve these longer-term agreements.

Leveraging trust to drive innovation through collaboration

With these foundations in place (trust re-established), collaboration, underpinned by trust, can unlock significant innovation and growth:

- Exclusive innovation partnerships: these partnerships incentivise supplier investment by assuring market access for their ‘next

big-bet’. Woolworths South Africa, for instance, offers guaranteed distribution points to key innovation partners, ensuring that even if an initial product flops, the space remains open for their next idea. This allows suppliers to have a consistent and well resourced innovation pipeline.

- Innovation investment funds and grants: retailers and suppliers can establish funds or grants to support innovation. These do not have to be large-scale — a \$30,000 prize for a hackathon hosted by a major retailer or supply partner²⁰ can transform a digital experience.
- Shared capital investments: this includes joint ventures, credit payback schemes, or direct ownership. Coles’ acquisition of Jewel of India²¹ manufacturing for their ready-meals range is a prime example of direct investment aligning incentives and driving market leadership in private label. Similarly, Woolworths’ 100% ownership stake in their ready-meals partner (The Kitchen)²² highlights this successful model.

By focusing on these strategic partnerships, Australian retail can reverse the cycle of underinvestment and innovation decline. It’s time to rebuild the handshake, re-establish trust and innovate with the confidence that comes from shared commitment, ensuring the industry’s future prosperity.

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TRUST ME ITS HALF PRICE!



By **Bernie Brooks AM**
Company Chairman and Retail Advisor

Owning a pub is a great education in customer habits and activity. I can sit in an empty pub at 350pm and then at 4pm, customers are lined up at the bar and the entire area is busy and vibrant - its 4pm Happy Hour!

Customers are smart and savvy - but they are also sceptics. They shop on many attributes but need to TRUST a retailer and brand to be loyal.

This is what we are seeing in FMCG. Retailers and suppliers collaborating to fund 50% off events that drive traffic and volume.

Budgets are now being built to match the prior year 50% off event, frequency is increased to enhance sales numbers, and retailers being appeased by suppliers supporting low price activity and helping them establish a competitive advantage - sounds like a great strategy and a new "norm" for all retailers and suppliers.

It has come about by a misbelief that other retailers and suppliers will not match, that customers will become more loyal because of the specials and the view that it builds incremental volume. It has flawed reasoning; it is based on emotion rather than fact and is a significant blunder with far reaching impacts. Specifically:

1. It trains customers to wait for discounts - Frequent or aggressive sales promotions train customers to expect and wait for future discounts. Many will delay purchases, only buying when items are discounted, making it harder to sell products at full price in the future. ("I'll just wait for it to be half-price and buy half a dozen to last to the next half price.")
2. Damage to brand perception and value - Regular deep discounts can tarnish your brand's reputation and make products seem lower quality or less exclusive. Luxury or premium positioning is especially sensitive to repeated sales, risking loss of loyal, high-value customers. ("It must be lesser quality if its half price," or "Wow they must be making such a big profit to put it on at half price" or "Hang on I bought that at full price last week - they are ripping me off!")
3. Attracting price-sensitive and "flirty" shoppers - Half price promotions often attract bargain hunters who are not loyal to your brand and will jump to competitors for better deals. This reduces the lifetime value of customers and does not build a sustainable customer base. ("I just move from store to store shopping the half price specials. They are at my mercy as I cross-shop every week.")
4. Competing on price can lead to a downward spiral, where you and your competitors continually undercut each other, damaging profitability across the industry and reducing all players' margins. ("It is 50% off that's the special today, so I will shop when there are bonus loyalty points as well or when I get an additional deal.")
5. Most importantly, it erodes consumer trust and perceived quality of the supplier and retailer. When customers see frequent deep discounts, they may believe your original pricing was inflated or that your products are worth less. This can damage trust and create negative perceptions that are hard to reverse. ("I am not loyal to any retailer now and I do not trust them.")

6. The concept of "productivity to reduce cost and provide cheaper product to the end user" is not predicated on supply lines thwarted by great variations in demand and large volumes one week and nil volume the next. ("I hate it when it's half price the fixtures are empty, and I can't get all the variants. Out of stocks make me go elsewhere" or "The aisles are full of roll cages trying to fill the specials. I find it hard to navigate the aisles.")

Overall, while half price promotions may appear attractive for generating quick sales or clearing out inventory, overuse or dependence on them can have lasting negative impacts on profitability, brand perception, and customer loyalty. It also destroys TRUST! Many experts recommend using alternative, value-added promotions or precise, data-driven discounting rather than blanket half-price offers.

Roy Morgan Research now puts the top four brands for TRUST as Bunnings, Kmart, Aldi and Apple. All have built customer trust with strong consistent pricing with a sprinkling of specials. Three of the worst six businesses in the same study are retailers- Coles, Woolworths and Temu. They all have lost trust with half price specialising, gamification and high low focus.

As retailers such as Walmart developed 'Every Day Low Price', many retailers followed with the objective of building TRUST and loyalty. They found out that this is not the answer either as it becomes 'boring' for customers and that over a period, the price suffers from 'fatigue'. The balance between A sprinkling of specials, particularly with items that are 'expandable consumption', and trusted prices has been well managed by Kmart, Aldi and Bunnings and their suppliers.

Hand in hand with that strategy is consistency in price offering and messaging. The result is the deserved reputation as the most TRUSTED brands.





INNOVATION CONVERSATION

Spokespersons from Jack Link's and Stuart Alexander talk strategies, challenges, the future of retail collaboration and more.



By Samantha Corrigan
*Innovation Manager,
Jack Link's Asia Pacific*

Innovation is one of the most talked about drivers of growth in retail, yet not all innovation delivers a meaningful impact. Too often, 'innovation' is a flavour tweak, a packaging change or a launch that adds little value for consumers or retailers. The companies that truly stand out are those that view innovation as a way of solving real consumer problems, build categories and create long-term value. Jack Link's and Stuart Alexander are two such businesses - different in their approaches, yet united in their abilities to make ideas have an impact.



JACK LINK'S

How would you describe your company's innovation strategy? What do you look for as uniqueness in innovation?

Jack Link's innovation strategy is all about building and growing the meat protein snacks category across APAC, which in many markets is still underdeveloped. The process starts with the consumer, understanding what they need, how they live, and where products can make their day easier or better. That means tasty, convenient protein that fuels energy, satiety and wellbeing. Jack Link's isn't just launching products for the sake of it, but creating formats, benefits and occasions that encourage more people to eat meat snacks more often. At the end of the day, the goal is to grow the whole category, not just the brand.

Uniqueness comes from solving a real consumer need in a way that feels both enjoyable and functional. It's protein snacks that taste great, fit easily into busy lives and deliver benefits people care about. Execution also matters. Jack Link's has built the scale, tech and expertise to make new ideas work commercially and adapt them to the differences across diverse APAC markets. That balance of creativity and practicality is what makes the company's innovation stand out.

What do you believe sets your company apart from competition in terms of innovation?

A lot of brands are just in the hustle of trying to sell their products. Jack Link's help lead and build the category. With Jack Link's as the number one brand and the addition of KOEEE! through acquisition, the portfolio flexes across different need states, consumer demographics, occasions and price points.

A great example is the launch of Jack Link's Beef Sticks and Biltong Air-Dried Steak Slices. From idea to prototyping, pack and food development, testing, production and shipping, all of this was delivered in under six months. That required new food formats, packaging and processes, and even capex investment in the company's plants. It's proof of how fast Jack Link's can move, scale and deliver products that meet evolving consumer and customer needs.

The ability to combine speed with scale, while staying true to consumer demand, is what really sets Jack Link's apart and makes the business a long-term partner in category growth — not just another supplier. Speed is nothing without scale, and scale is nothing without consumer demand. Jack Link's ambition is to bring all three together.

In terms of introducing new products to market, what are some of the biggest customer and consumer challenges you are faced with?

For consumers, it's about awareness and habit. Meat snacks are still pretty new in many APAC markets, so people need to discover and try them, then build them into their routines. For customers, the challenge is scale. New ideas don't start efficiently, but retailers

want them to deliver like established products from day one. Add in the complexity of regulations, packaging formats and diverse market needs, and you've got a tricky balance to scale and deliver value for consumers. Jack Link's wants to bridge that gap, making innovations both exciting for consumers and commercially viable for customers and ourselves.

The biggest challenge isn't creating a product. It's creating a behavioural change.

How do you see your company's own development program influencing innovation in future?

Jack Link's is investing in capability across the board: better talent, stronger insights and world-class tech. This enables the business to move faster, scale smarter and adapt locally without missing a beat.

Teams are expected to show stewardship (one of the Jack Link's family values), using intuition, experience and initiative. The answer isn't always sitting neatly in front of them. Jack Link's looks for people with a 'growth' mindset who are willing to pilot bold ideas, bring energy and ambition, and then commercialise with pace. Testing, learning, making mistakes and moving forward quickly is how Jack Link's will continue to drive growth for the category, the business and its customers.

Do you believe that retailers should be co-partnering in innovation and sharing the risks?

Absolutely. Innovation isn't a one-way street. It works best when suppliers and retailers co-invest, co-develop and share the ownership of the successes and failures. That way, everyone wins: categories grow, shoppers get more choice and retailers see bigger baskets.





STUART ALEXANDER

How would you describe your company's innovation strategy? What do you look for as uniqueness in innovation?

Stuart Alexander's strategy focuses on finding true gaps in the market, where needs are unmet, or where those currently addressing them are not adding maximum value. The company believes consumers want diversity of choice, especially in a digital age where trends are visible globally.

As a distributor partner, Stuart Alexander acts as an agent for a number of international companies, including Perfetti Van Melle, the Hershey Company, Lotus Biscoff, Monin, Ocean Spray and many others. This enables the business to 'shop innovation' from across the globe and identify what is best suited to the Australian landscape.

Stuart Alexander is always looking to add something new to its portfolio, provided it adds genuine value to the market.

What do you believe sets your company apart from competition in terms of innovation?

Deep customer connections and global reach. Stuart Alexander prioritises strong connections with customers and a deep understanding of what they are seeking, investing significant time overseas to study trends, technology and the retail market. The company acts as a matchmaker for opportunities and can move with pace to bring a brand or product to market. As products are not built entirely from scratch, the company's unique selling point is the ability to act quickly to seize opportunities.

Innovation isn't just about finished products, it can also be what is co-created with customers. Categories such as bakery, dessert and drinks have all been areas where Stuart Alexander has worked with customers to make products using its brands as ingredients. Lotus Biscoff, Reese's, Chupa Chups and Tabasco have all introduced exciting new offers in the market through these collaborations.

In terms of introducing new products to market, what are some of the biggest customer and consumer challenges you are faced with?

While idea-to-execution is fast, importing from all corners of the globe can take time. This requires careful planning with customers and often confirmation ahead of traditional range review windows to manage risk. Stuart Alexander works closely

with a number of industry partners to ensure compliance, as Australian regulations can be complex for international partners, often with entirely unique requirements. The company seeks to own these challenges for its partners and streamline operations to make the path to market as smooth as possible.

How do you see your company's own development program influencing innovation in future?

Stuart Alexander is over 140 years old, yet also sees itself as being at the beginning of its story. Looking ahead, the company is increasingly leveraging technology to simplify operations and capture greater insights from across the globe at the touch of a button. At the same time, it will never lose sight of the fact that it is a people business, built on deep partnerships with customers and brands.

Do you believe that retailers should be co-partnering in innovation and sharing the risks?

Absolutely. We believe that retailer co-partnership in innovation can be a true source of competitive advantage, making it a genuine win-win. The company already sees strong examples of this and works hard to maintain these partnerships, though not all operate this way. Since the risk is mutual when innovation fails, it is critical to ensure both parties are motivated to achieve success.

There's no single way to innovate. Jack Link's grows from the inside out, building new formats and scaling categories. Stuart Alexander looks outward, curating global ideas and tailoring them for local needs.

However, both companies prove that innovation only matters if it creates value: for shoppers, retailers and for the company. At the end of the day, value is what delivers impact and sets these companies apart.



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A RARE AUDIENCE WITH TWO OF AUSTRALIAN RETAIL'S MOST INFLUENCIAL VOICES



By Bianca Velez
Founder,
BLANC Media & Marketing

In a sector as dynamic and fast-moving as Australian retail, opportunities to sit down with two of its most influential leaders are few and far between. That's why it was such a privilege to spend time with **Bernie Brookes AM, Chairman of the Australian Food and Grocery Council (AFGC), and Colm Maguire, CEO of AFGC** — two voices shaping the future of retail and FMCG at the highest level.

Bernie Brookes AM is a name synonymous with Australian retail leadership. With decades of experience across major retail organisations, Bernie has steered companies through complex transformations and periods of immense change. His perspective on leadership, innovation, and the evolving expectations of customers carries both weight and wisdom.

Colm Maguire, as CEO of AFGC, represents the collective voice of Australia's food and grocery industry. Known for his collaborative approach, Colm has been instrumental in advocating for stronger industry partnerships, policy reform, and strategies to drive sustainable growth. His work ensures that the sector remains resilient, competitive, and prepared for the challenges of tomorrow.

Together, their insights provide not only a snapshot of where the industry is today, but also a roadmap for where it's heading.

What stood out most in our discussion was the leadership philosophy both men bring to the table. For Bernie, effective leadership is about clarity, accountability, and courage in decision-making. For Colm, it is about building trust, fostering collaboration, and ensuring the collective voice of the industry is not only heard, but respected.

Together, they embody a vision of leadership that balances pragmatism with ambition — one that ensures the AFGC continues to play a pivotal role in supporting both retailers and suppliers.

For those working in or alongside the retail and FMCG sectors, conversations like this are more than just insightful — they're essential. They remind us that the future of our industry depends on strong leadership, open collaboration, and a willingness to innovate with purpose.

To have had this rare audience with two of Australian retail's most influential voices was both an honour and a reminder of the role we all play in shaping the future of the industry.

FROM SHOP FLOOR TO ORDER OF AUSTRALIA:

Bernie Brookes AM on Legacy, Leadership and the Joe Berry Effect



How did being the inaugural winner of the Joe Berry Award shape your early career?

The award was 40 years ago and provided a springboard to my career at Woolworths. It enabled a retail study tour to venture overseas and learn. The award expanded my network and taught me to never stop learning and educating myself.

What did the award mean to you then, and what does it mean to you looking back now?

I look back with pride and appreciation. Appreciating the sponsors and supporters, particularly the founding partners, while being proud of the 40 executives who have won the award — many of them now in senior business roles.

How have you seen the award evolve over the years and what value does it bring to today's young retail and FMCG leaders?

The quality of entrants has improved immensely, and the professionalism of the award has stepped up as well. The award provides an opportunity to showcase executive talent to industry leaders. It provides education to all involved and brings the industry together.

LEADERSHIP AND CAREER MILESTONES

You've held some of the most influential roles in Australian retail. What leadership lessons have stayed with you throughout your journey?

There have been several lessons that I have learned and traits that I now adopt which are:

1. Always continue to learn.
2. Competence is an asset, but humility can be a bigger asset.
3. Surround yourself with good people who you trust and learn from.
4. Recognition and reward are often underestimated in business success and business culture.
5. You must be quick to acknowledge and repair when you have made an error in judgement.
6. A mix of experience, youthfulness and diversity of background provides for a very good management team.

What has been the most rewarding challenge you've faced in your career?

That was in 2006 with the purchase of Myer from the Coles Myer group, a turnaround from a \$60 million loss to a quarter of a billion dollar in EBITA. The associated IPO was a credit to the management team and the owners at the time.

What qualities do you believe separate good leaders from truly great ones in retail and FMCG?

Good retail and FMCG leaders need to have an inquisitiveness, be an 'all-rounder', knowing most aspects of the business, look to continually educate and learn, plus need to understand the best results come from shared objectives and cooperation across the industry.

INDUSTRY INSIGHTS

What are the biggest changes you've observed in the retail and grocery sectors over the last 30 years?

The changing consumer psyche, combined with the availability of information through smartphones, the world wide web and artificial intelligence has really revolutionised the industry. The biggest challenges have been understanding and utilising that technology.

In addition, attracting and holding onto good-quality people in the industry has been, and will continue to be, a challenge. Changes in government policy over the last 30 years have caused many new focal points for the industry. The globalisation of the retail and FMCG industry has also provided some favourable and not so favourable challenges. Finally, an over-reliance on price in the marketing armoury has continued, therefore reducing the strength and success of brands.

What opportunities do you see for Australia's FMCG sector over the next five-10 years?

Industry rationalisation, mergers and acquisitions, locally and internationally, will continue. I also see an ongoing drain in the quality of people as other 'sexier' industries gain prominence. The balance between social, environmental and governance requirements with sales, profit and costs will make it difficult for small and big industry players to enhance levels of profitability.

The rise of private label, the strengthening of discounters and increasing cost impacts will make return to shareholders a real challenge across the entire industry. Finally, the growth of marketplaces, pure play operators will provide increasing challenges to omnichannel retailers. Bricks and mortar will always have pride of place for most shoppers, but the ability to compete across all channels is going to become increasingly challenging.

How should companies respond to increasingly value-driven consumers without compromising profitability?

We have been through periods of cost pressures and frugal consumers before. Staying true to the brand, investing for the long-term future, focusing on value without over-reliance on half-price discounts and building customer trust is going to be critical. A gradual move towards 'premiumisation' is going to be required as the stress in consumer expenditure is alleviated. Those that invest in brand during difficult times will get a significant and faster recovery to levels of acceptable profitability.

LEGACY & MENTORSHIP

You've mentored many future leaders. What qualities do you look for in high-potential talent?

Talent today is very different to what it was up to 40 years ago. Loyalty is a luxury that many employees do not have. The eagerness of new recruits to advance, combined with cost pressures has greatly thwarted important components of retention, namely reward, recognition, training and recruitment. Cost pressures make it difficult to attract and retain high-potential talent. The secret is to nurture the 'good ones' by thinking wider than just financial rewards, bonuses and promotions.

A 'whole of life' strategy combined with such things as mental health support, personal development and flexibility will be important retention elements. In selecting talent, I look at the criteria, which includes their level of competence, ability to work as individuals and work as a team, growing their own abilities consistently and frequently. Integrity with which they act and deal with people, their ability to create solutions

to major problems, their communication strengths, and an energy that enables them to not only apply themselves to the task at hand but also to bring others on the journey.

What's the best piece of advice you've ever received and who gave it to you?

Mr Paul Simons, who recently passed away, was the leader of Woolworths in the '80s and '90s always had a motto that 'if you always tell the truth, you never have to remember what you said' It is very much the case today in environments where integrity is often compromised — 'fake' has a new meaning, and for all the benefits of the web, it does provide some significant disadvantages in compromising an individual's fact base understanding and attitudes.

What legacy do you hope to leave for the industry and future Joe Berry Award winners?

I would be grateful, after 40 years of the Joe Berry award, that I have played a role in the careers of many individuals that have gone on and will continue to go on to be industry leaders. It's not about the legacy I leave; it's about the legacy that mentors, industry groups and experienced FMCG advocates and retailers, leave through a focus on nurturing and developing future executives. There is no greater legacy than having an individual acknowledge the contribution that today you make to their livelihood and well-being

QUICKFIRE QUESTIONS - PERSONAL PERSPECTIVE

A book every business leader should read.

Andrew Jennings OBE was a tremendous retailer who ran Saks 5th Avenue, Harrods, Karstadt in Germany and Woolworths in South Africa recently published a business book in London called Almost Is Not Good Enough. It combines some great stories from his wealth of experience.

One daily habit that keeps you grounded.

In actively running retail, the best grounding activity is walking stores and talking to people, particularly customers. Good executives must be able to dial up and dial down talking, from analysts, investors and boards to those on the shop floor.

I have been fortunate enough to be involved with several charities, including the Salvation Army and the 'HeForShe' program in South Africa, there is nothing more uplifting than spending time with those less advantaged than you to remind yourself of the fortunate life you lead.

Your proudest moment in business.

Being awarded the Order of Australia for service to retail and community was a great honour. Secondly, the acknowledgement for the work undertaken in Soweto in South Africa resulting in a United Nations HeForShe award are moments which made me very proud, but also very appreciative of the support I've had from family and friends over an extended period.

CHIEF CONCERNS:

A New Era Begins at the AFGC



Congratulations on your appointment. Can you tell us a bit about your background and what led you to the AFGC?

My career has been built on service — to members, to communities and to sectors that play a vital role in the fabric of Australia. I've had the privilege of working across national member organisations, sport and industry bodies, where I've led strategic change, strengthened governance and built deep engagement with diverse stakeholders.

What attracted you to this role?

Having had great people talk to me about the purpose and impact of the AFGC I joined mid-last year and have been nothing but impressed.

The AFGC sits at the intersection of industry, government and community. The organisation has a strong foundation, but there's an opportunity now to deepen relationships, strengthen our voice and create real value for all our members, the sector and our stakeholders.

What is your vision for the AFGC and the industry over the next three to five years?

My vision is for the AFGC to be the trusted, go-to voice for the food and grocery sector — respected by members, government, retailers and the public.

For the industry, it's about resilience and competitiveness — ensuring members can thrive in the current economic climate, supply chain challenges and regulatory change.

What are your immediate priorities in your first 12 months as CEO?

In the first year, my focus is on listening and building — listening to our members to understand their priorities and building the internal structure, systems and culture that will help us deliver on them.

Above all, my priority is to ensure members feel they have a real partner in the AFGC — one that is proactive, connected and committed to their success.

What do you see as the most pressing challenges facing the food and grocery sector today?

From rising energy and transport costs to changing packaging requirements and the complicated environment that comes with workforce planning, manufacturers are being asked to do more with less — all while maintaining quality, safety and innovation.

How is the AFGC advocating for manufacturers in a high-cost, high-regulation environment?

Our role is to be a clear, credible and respected voice for the sector. That means ensuring government or other key stakeholders understand the impact of policy decisions on the ground.

Where do you see the greatest opportunities for innovation in food and grocery manufacturing?

Innovation isn't just about new products — it's about finding smarter ways to work. That includes automation, digital traceability, more efficient energy use, and packaging solutions to meet both environmental and commercial needs. There's also huge opportunity in how we partner across the supply chain — innovation often happens fastest when businesses and regulators work together.

How is the AFGC supporting digital transformation, automation and the future of manufacturing?

This is a real area of opportunity for us at the AFGC and part of our job is to bring global insights and local capability together. We also make sure innovation isn't just for the largest businesses — smaller members need access to the same opportunities.

Workforce shortages and skills development are critical issues. What's your perspective on tackling these?

This has been one of the real takeouts from my conversations with our CEOs. There is a real pride and loyalty within our sector, and every leadership story has started in a small office or factory floor. It will start with telling the story you all know so well — this is a sector with purpose, impact and career opportunities.

Who are the leaders or organisations you admire in the industry or beyond?

Given my sporting background, most would expect me to lean that way. However, I would be lying if I didn't lead off with being a Simon Sinek fanboy. His leadership from a place of common sense, relationships and humanity is deeply connected to the way I want to lead.

What's one thing you think people misunderstand about the work AFGC does?

People sometimes think of us as 'just' an advocacy body. While that's a huge part of what we do, we're also a connector, a problem-solver and a partner to our members.

What legacy would you like to leave at the end of your time as CEO?

If, at the end of my time here, our members say 'I am a proud member of the AFGC and see real value in all that they do' then I'll consider that a legacy worth leaving.

THE JBA EFFECT: LIFE AFTER WINNING THE ACTIVATE JOE BERRY AWARD



By Sarah Hughes
2015 Joe Berry Award winner
Head of Wholesale, Mosey Me

Over the years, a diverse range of young retailers have participated in the annual Joe Berry Award. As we look forward to the 40th anniversary of the award in 2026, let's meet five past winners as they reflect on their careers so far and what the Joe Berry Award has meant to them.

ALEX RENEHAN



2019 Joe Berry Award winner
Co-Founder, Equity Mates

What are you doing now?

I'm running a digital media company called Equity Mates. It started as a side project with a university mate — something we worked on after hours and on weekends — but it's grown into our full-time jobs. We create educational content to help make investing less intimidating and more accessible for everyday Australians.

What has your post-JBA experience been like?

Although Covid threw a spanner in the study tour plans, the JBA still opened a lot of doors. It gave me the chance to connect with senior leaders at Coles, where I was working at the time, and across the broader retail and FMCG landscape.

What advice would you give your younger self and to those entering the JBA?

Say 'yes' to those extra opportunities, even if you're not sure where they'll take you. Something like Joe Berry may feel like 'extra work', but the experience, the people I met and the knowledge I gained were game-changers for my career.

What are you looking forward to most for the 40th anniversary of the JBA next year?

Celebrating the people that have contributed to Joe Berry over the years. The industry has changed so much in 40 years, and a lot of that change has been driven by people who've been part of the JBA story.

GRAHAM FAIRBAIRN



2013 Joe Berry Award winner
Global Business Unit Lead, Mutti

Where are you now?

Parma, Italy - our second overseas posting as a family and my 10th international move. I'm a Global Business Unit Lead with Mutti.

What has your post-JBA experience been like?

Wild. Inspired by my JBA journey I applied for a Harvard MBA and had an amazing experience in Boston with a group of inspiring business leaders. Since then, I've stepped into general management, which is where I've always wanted to be. In retrospect, JBA turned out to be a major 'sliding-doors' moment in my career — it pushed me to think bigger about my future.

What advice would you give your younger self and to those entering the JBA?

Never tell yourself 'no' or talk yourself out of something.

What are you looking forward to most for the 40th anniversary of the JBA next year?

I'm really hoping to see plenty of alumni and find out how the JBA has influenced careers in the 40 years of the award, but I'd also be pleased just to be in the same time zone and watch some of the candidates present.



THEA DICKINSON

**2021 Joe Berry Award winner
Category Development
Leader - Grocery, Mars**

What are you doing now?

After winning JBA in 2021, I have stayed at Mars [a great business] and held three different roles. Mars is entering an exciting period with the pending acquisition of Kellanova — a change I am energised by. Since winning, I have participated in the Observership Program, completed the company directors course and now sit on a board.

What has your experience post-JBA been like?

JBA has helped me build my profile, make great connections with talented individuals, and opened up fantastic opportunities like getting to participate in a panel at the AFGC’s annual forum for CEOs.

What advice would you give your younger self and to those entering the JBA?

I wish I had known earlier how important self-advocating and building relationships are for career progression. You can be the smartest person in the room but, without advocates, you will be limited in how far you can go.

What are you looking forward to most for the 40th anniversary of the JBA next year?

Like always, I look forward to catching up with the wider JBA community and hearing about what everyone has accomplished in the past year. Anything extra special arranged beyond that will be a bonus!



ESRA OZEGE

**2018 Joe Berry Award winner
Co-founder, Harvest Pantry,
Chair, Joe Berry Award Alumni
Committee**

What are you doing now?

After an incredible career at Mars working across multiple business units, leading sales in every channel, and serving on industry and FMCG boards, I now have the privilege of leading the Joe Berry Award Alumni Committee. I’ve spent the last few years mentoring small businesses to move from the start-up hustle to scaling into grocery, and now I’m walking that path myself. Since leaving Mars in September, I’ve been running two companies I’m deeply passionate about: Good Society Food Co, now in over 570 health food stores. And Harvest Pantry, which will be hitting supermarket shelves in 2026. It’s been a leap, but one that combines my love for building brands, mentoring others and driving real growth.

What has your post-JBA experience been like?

Post-JBA, I’ve had opportunities that stretched me and the privilege of learning from networks and leaders who inspire me. It’s taught me to truly value my time, recognise and protect great culture, and, most importantly, given me the confidence to back myself, unlock bigger possibilities, and stay true to what’s right for me.

What advice would you give your younger self and to those entering the JBA?

I’d say lean in fully and say ‘yes’ to opportunities that scare you a little. The networks you build here can shape your entire career, so nurture them. Value your time and your contribution early and don’t wait for permission to back yourself. And pay attention to culture — protect the good ones fiercely and walk away from the ones that quietly undermine you.

What are you looking forward to most for the 40th anniversary of the JBA next year?

To leading the 40th anniversary reunion with the majority [fingers crossed] of the alumni coming together! We are looking at a shift of the format to make it more dynamic and engaging for this extra-special event. As head of the Alumni Committee, I’m grateful for the opportunity to work closely with the Activate board to help bring this vision to life.



**2015 Joe Berry Award winner
Head of Wholesale, Mosey Me**

What are you doing now?

After stints at Coles and Aesop, I am the head of wholesale for a Melbourne start-up homewares company called Mosey Me. We're known for bringing colour and joy to our customers' lives with our original artwork and design. My remit is to strategically grow the brand and increase our points of distribution. We've had a few major stockists range our brand this year which has been really exciting! Being a small business, we all chip in and work closely together. On any day, you can find me in the warehouse packing orders, visiting stockists, creating eDMs, analysing reports, negotiating terms or on a photo shoot. It's a cliché, but no two days are the same!

What has your post-JBA experience been like?

So much has happened since I won the JBA! I've worked across a number of retail businesses in various roles and highlights include opening Aesop's first permanent travel retail store at Melbourne airport and managing a start-up business while the owners were on maternity leave. These opportunities came about through my Joe Berry experience, the network I gained and the skills I honed through the award's process. Outside of work, life has also been busy – I got married, have two beautiful daughters and a labrador.

What advice would you give your younger self?

Always back yourself and advocate for your ideas and career. Take opportunities as they arise and seek them out, even if the timing feels tricky. If you're not feeling challenged and learning every day, then you're probably in need of a change.

What are you looking forward to most for the 40th anniversary of the JBA next year?

Catching up with the Joe Berry alumni and discussing challenges and opportunities in the retail industry. I'm also intrigued about the ideas and solutions the finalists will bring to the table and who will win the great debate!

Interested in attending or sponsoring the 2026 edition of the Activate Joe Berry Award?

Contact Keith Quigg at enquiries@activateaus.com.au to find out more.

FACING THE JOE BERRY CHALLENGE

Holly Gregory takes us through her JBA experience.



By Holly Gregory
Assistant Brand Manager, Tim Tam

I first entered the award in 2022 on my first day as a graduate. My manager at the time, who had previously entered, encouraged me to take part as a means of challenging and fully immersing myself in my new role and industry. The catch? The submission deadline was just two weeks away. Nevertheless, I embraced the challenge, quickly becoming something of a mini-expert on my chosen topic. While I always intended to enter again, I decided to wait until I had both more experience and the time to give the essay my full attention, which was this year.

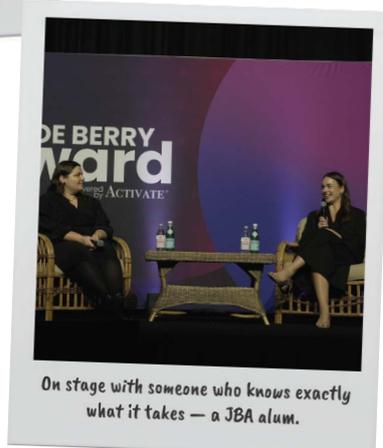
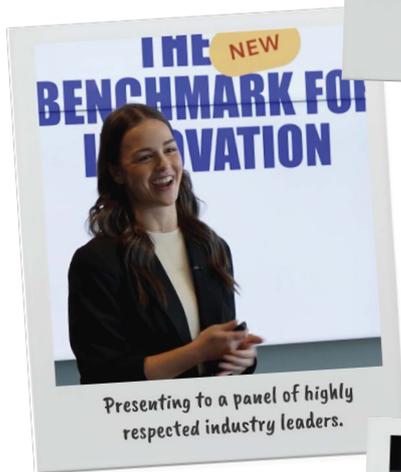
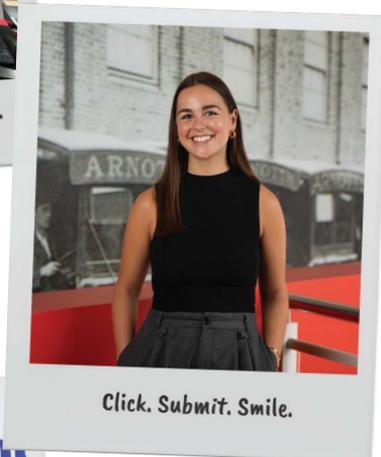
Each November, when the essay topics are announced, participants can choose from five areas. This year's themes comprised evolving retail formats, automation, brand management, and retail media. The topic that stood out to me, however, was product innovation, which is a critical engine of growth for both companies and retailers, yet it remains notoriously difficult to get right. According to Harvard, the average success rate of new product innovation is just 5% a staggering figure given the time, money, and effort invested in NPD. Today's environment only compounds the challenge: shelf space is shrinking, margins are tighter, costs are rising and shoppers are more selective and informed than ever. Every purchase becomes a risk-reward decision: Will I like it? Will my household eat it? Is it worth my money? With so many pressures converging, one question cut through the noise: What needs to change to make innovation truly succeed, not just for companies and retailers, but for the people they serve? That moment of clarity provided the spark, and the structure, for my essay.

When it came to writing the essay, starting early proved invaluable. It afforded me the time to conduct comprehensive research, develop a deep understanding of the topic and shape my own opinions. However, the most insight was found in conversation; both within my organisation and across the industry.

These discussions brought real-world insights and examples that anchored my essay in the realities of today's market. One particularly impactful conversation was with the founder of a start-up, who helped me pressure-test whether my recommendations would hold true for small- to medium-sized businesses. This was crucial to balance my arguments where most of the available research and case studies, came from larger companies.

Following the essay, I received the call in May that I'd been named a finalist. The initial elation quickly gave way to a daunting question: how could I possibly compete with these incredible individuals? The imposter syndrome hit harder than ever. I was the most junior and least experienced in the room, and the self-doubt crept in immediately. But I used it as fuel, pouring every ounce of energy into preparation. Every day became a cycle of practice, feedback, fresh perspectives, and new learning.

Thanks to this rigorous preparation, I was pleasantly surprised by how calm and composed I felt on the day. Plus, a quick listen to Rock This Party by Bob Sinclar helped settle my nerves. Once in the room, I quickly found my rhythm. Some questions were challenging – including, as expected, one on the US' tariffs. However, I maintained composure and responded thoughtfully. I left feeling genuinely proud of what I had achieved, regardless of the outcome.





Receiving the trophy and being named the 2025 JBA Winner — what a whirlwind.



Humbled and proud to be named the 2025 JBA Winner.

I don't think I've ever experienced such concentrated growth, both personally and professionally, as I did through the JBA experience. It pushed me to think more critically, ask deeper questions, and engage with complex industry challenges. It taught me to trust myself, to stay open and to always seek out perspectives beyond my own.

By challenging my thinking and stepping into the perspectives of other stakeholders, I began to see myself not only as a marketer but as a future general manager. Marketing is my functional skillset, but it becomes exponentially more powerful when paired with a general manager mindset.

This transformation stemmed from actively building connections, and I'd encourage all entrants to do the same. From colleagues at Arnott's to category managers at Coles and Woolworths, to professionals in completely different industries. These interactions not only broadened my knowledge but also helped me build a wonderful network.

Reflecting on the past year, my research into innovation has reinforced a key insight: the question is no longer if we should innovate, but how we innovate better. Innovation remains a critical driver of category growth, a way to meet evolving consumer needs and a means of brand differentiation in an increasingly saturated market.

What became clear to me is that while many companies generate strong ideas, they often fall short of truly connecting with consumers — missing the mark on relevance or failing to unlock a genuine new consumption occasion. In today's climate, consumer willingness to spend hasn't disappeared; it is simply reserved for what feels worth it. To break through, suppliers and retailers must work together to identify untapped needs and solve real shopper tensions. Innovation must be meaningfully rooted in the way people live, shop and consume today, and deliver clear benefit for suppliers, retailers and consumers alike.

Young leaders are in a unique position to drive this kind of innovation. We bring fresh perspectives that allow us to challenge the status quo in constructive ways. By asking thoughtful questions, testing ideas with curiosity, and encouraging cross-functional collaboration, we can help create the conditions for new thinking to thrive.

It is then up to organisations to foster a culture of innovation by deliberately creating an environment where curiosity, new thinking, and calculated risk-taking are encouraged. A key part of this is adopting a 'fail fast, learn faster' mindset. Start-ups do this exceptionally well. They test ideas quickly, collect feedback and either improve or pivot before wasting time and resources, preventing long, expensive development cycles that collapse at launch.

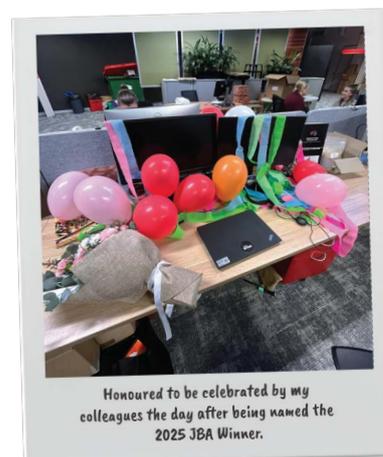
This journey reminded me that growth happens at the edge of our comfort zones. From intense research to standing in front of industry leaders, every step stretched me. The Joe Berry Award has been a catalyst for growth, fuelling my ambition to keep learning, challenging and leading positive change in FMCG.



Proud to stand alongside such talented finalists.



Being recognised by industry leaders — equal parts surreal and motivating.



Honoured to be celebrated by my colleagues the day after being named the 2025 JBA Winner.



CULTIVATING TALENT, FUELLING GROWTH:

Inside the Joe Berry & AFGC Scholarship Experience



By Cathy Garrone
National Account Executive,
Coffee at CCEP

Entering the Joe Berry Award has always been on my radar, especially with the buzz it creates at the CCEP office when we host the finals each year. However, I kept putting it off – too busy, too daunting, always an excuse. That changed in 2023 when I attended the Joe Berry dinner. The calibre of discussion, quality of ideas and sense of community were inspiring and reignited my interest. Though life got in the way that year, I registered early in November 2024, determined to put in a submission.

Most topics were foreign and intimidating – retail media, brand management, automation. So, I chose product innovation, the topic that interested and excited me the most.

My essay explored how businesses can improve their chances at NPD success in a world where 4 out of 10 new products fail¹. Innovation is known to be essential for growth, but success requires more than just a good idea. It demands structure, insight and collaboration.

Key findings included:

- **Stage-Gate Process:** structured, multi-phase frameworks such as the Stage-Gate process were demonstrated to improve accountability, risk management and deliver 2.5 times more success². Outcomes were further enhanced through senior management support, cross-functional teams, agile iterations and clear success metrics.
- **Voice of Customer (VoC):** with 80% of NPD failures linked to poor customer alignment³, integrating the VoC throughout development ensured relevance and responsiveness to evolving customer needs.
- **Strategic Partnerships:** collaborations between suppliers and retailers accelerated market entry, reduced costs and boosted visibility, evident by the successful Celsius and 7-Eleven partnership.
- **Time Frames:** though some products achieve rapid success, data showed that 90% of NPD required post-launch adjustments⁴. Long-term survival hinged on sustained performance over a two-year window, and this was determined to be an acceptable time frame for NPD acceptance.
- **Role of the Government:** while businesses drive innovation in their industries, government support was shown to reduce barriers and improve NPD profitability by streamlining regulations, investing in infrastructure and education, and backing circular economy initiatives.

The writing experience was both challenging and rewarding. It pushed me to dive deep into a topic I initially knew little about and encouraged me to lean on my network for support. I'd often heard that the Joe Berry Award opens doors and builds connections, but experiencing it first-hand truly brought that to life. Every person I reached out to was generous with their time, insights and encouragement.

When I was named a finalist for the AFGC Future Leaders Scholarship, the support only grew. I was fortunate to receive one-on-one coaching from senior leaders, engage in brainstorming sessions and present in front of various teams, all of which helped sharpen my thinking and build confidence. The final presentation was the most nerve-racking moment of my career to date, but stepping outside my comfort zone and knowing I had my network's support brought immense pride. Winning the scholarship was an honour, but the real rewards were the learnings, personal growth and connections made along the way.

To anyone considering entering the Joe Berry Award, my advice would be to just go for it. It isn't every day that young executives are offered an opportunity to connect with the brightest minds in FMCG, and the experience will challenge, stretch and help you grow in ways you might not expect. Be open, be curious and don't be afraid to reach out. And to companies considering sponsorship, your support makes all the difference. Investing in emerging talent not only shapes the next generation of leaders, but fosters a culture of innovation and strengthens the future of our industry.

¹ sponsors.marketingscience.info/wp-content/uploads/sites/2/_pd

² a/c_pub/2021/01/2020-12-22-How-Common-Is-New-Product-Failure.pdf

³ www.stage-gate.com/blog/the-stage-gate-model-an-overview/

⁴ www.itonics-innovation.com/blog/customer-driven-innovation



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AN INSIDE LOOK AT A MENTORED INDUSTRY



By Keith Quigg
Director/CEO,
Activate Group Activate

“A seismic shift in Australia’s job market looms as AI prepares to replace ‘tens of thousands of middle-class workers in banking, HR and call centres.’ (The Australian) The selection of these industries is interesting in its presumption that this is where the impact will be most felt. Perhaps the reality is that all industries will be challenged by this seismic change. Retail certainly will.

AI is only one of the looming elements that management faces in the modern era, along with work-from-home laws, four-day work weeks, pets-in-house and a variety of specialised days for gender and charity engagements. These disruptors have created a paradox for industry as the skills of management and leadership diverge, creating a split in the ability of a business to stay on-track. The same people – two differing but vital paths. The above elements have created situations-unknown for most managers and critically assessed the role of leadership.

The expectations of new and potential employees are far more diverse than that experienced with employees already in the industry. We are seeing reductions in resumé viability, the move to videoed application assessments, the decreasing influence of degree qualifications and, for some categories, a drought in available talent. When linked to the aforementioned paradox, a completely new look at employment methodology is inevitable.

For many businesses, the priority has been to figure out what innovative methodology is required to make employee selection an easier and more viable action. Who is taking this responsibility, what are the skills and KPI movements that need to be invoked and who do we go to in order to start looking?

Yet this is not the main priority! The main one is to take a long hard look at the internal structure of your business, the qualifications of those who hold the management and leadership roles and the identification of where their skill gaps are evident. It is logically impossible to be seeking new employees with unexpected skills when the inside of the business is not ready to receive them. From the CEO down, each business must be evaluating, with gusto, the limitations of those entrenched managers/leaders who will oversee those skills.

Only when the incumbents have a clear picture of upgrades they must seek and attain can any strategic and realistic decisions be enforced. How can an HR team design an appropriate brief if the leadership does not know what the role requires? How do the middle management team induct new team members when they don’t have a strategic platform from which they can lead? Given the current skill levels, do we know what the business needs from new employees? So many questions that must be addressed.

The second priority is an automatic follow-on from the evaluation. Have we actually audited two things, a) the new-wave talent that exists within the current team that has not previously been accessed (because we didn’t ask) and b) what is the motivation of those in the current team to take on new roles that encompass these new skills? Expanding on the value of current employees before we take on the task of looking outside is just common sense.

One of the key findings from the Activate Joe Berry Award, year-on-year is the surprise that company leaders have when existing in-house talent is exposed through their solidly researched essays. This exposure includes the inherent talents, the expressions of career motivation, expansion of the skill base within the business and elevation for those who took the chance. For companies that have made this discovery, the need to look outwards immediately becomes a secondary consideration.

This internal self-audit does not have to be a full-scale upside-down, inside-out exercise. It can be something that, linked to the strategic plan and can be phased over a year. Starting at the top and identifying both the leadership gaps and the unused management talent is essential. Filling these gaps and expanding the management reach can follow on, either for the individuals or for a group. Either way, you know that there will be gaps in emerging skills, where further education is now mandatory.

For all levels of management and teams, a program of mentoring is by far the most accurate way of locating the issues that can plague any business. Strong mentoring allows for more open conversation, expression of desires, spoken attitudes towards



further education and, of course, leadership potential. If, as a business, you are not experienced or skilled in mentoring, then bringing in professional support is the best way to start. A professional mentor will not only improve the necessary leadership but upskill team leaders on how to mentor their own teams and identify talent.

While constantly rewarding employees with imposed and often unearned bonuses may be the 'modern way to manage', such actions do nothing to propel a business forward. Business can be tough and motivated team members who have had the opportunity to experience internal recognition are far more likely to bring in better results.

So, what do you do from here?

- Look at the business' strategic plan and place the riders that apply to AI and other impactful trends.
- Audit the entire team on its understanding of the strategies and define the missing talents and skills.
- Apply educational plans that upskill managers and leaders on each new technology and skill.
- Identify employees who have some of the new skills and the desire to move in those directions.
- Mentor, from the top down, to begin the development of internal progression.
- Bring in professional mentors to start the process and build the protocols.
- Brief HR and strategise new protocols for the recruitment of new staff.

It costs less to encourage, develop and implement the talents that are already in existence within your business. The reward for developing within will surprise you and motivate everyone who is included. Increasing leadership skills, along with having the ability to recognise what is already on board, is priceless.

Common logic is the best tool you can ever use, and mentoring provides the best connections you can have!

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FASTER, BOLDER, SMARTER

Lessons from the World Retail Congress



By Olivia Grey
Marketing Manager,
VidaCorp

Winning the Activate Joe Berry Award has opened the door to invaluable learning and development – from speaking opportunities and professional mentoring to building a broader network across the retail industry.

This winner's journey reached its peak with an overseas trip to London for the World Retail Congress (WRC) – a rare chance to gain global perspectives on the future of retail, hear from thought leaders and explore innovative flagship stores such as IKEA's Oxford Street store, purpose-built for Londoners in smaller spaces.

Held shortly after 'liberation day', there was lots of discussion about the uncertainty created by Trump's tariffs, as well as how retailers and suppliers can better navigate threats through stronger collaboration.

The 2025 theme, 'Faster. Bolder. Smarter', captured the three growth drivers shaping the next era of retail and explored through various panels and keynote speakers over three days.

Faster

The pace of retail has accelerated, driven by rapidly shifting consumer expectations, digital disruption, heightened competition and supply chain shocks. To remain relevant and resilient, brands must adapt with speed and agility.

Preparing for this constant state of change requires leaders to cultivate a culture of curiosity and calculated risk-taking, embedding innovation as a core organisational value.

Ian Bailey, Chairman of Kmart, shared how the retailer's private-label brand Anko has opened four stand-alone stores. While acknowledging that not all may remain open in the long term, Bailey framed the initiative as a test-and-learn exercise — a deliberate move away from “over-intellectualising in a boardroom” and towards real-world experimentation.

Nadine Graf, President, EMEA, UK & Ireland, and emerging markets at Estée Lauder, discussed how the brand overhauled its internal NPD process to move faster, enabling it to triple product launches to keep pace with TikTok-driven trends. Similarly, UK retailer Morrisons found its traditional four-month range review process too slow to compete effectively. As CEO Rami Baitiéh put it: “Transformation is constant. Like cycling up a mountain, you can't stop.”

Ultimately, leaders must be willing to fail fast to succeed faster.

Bolder

In today's omnichannel retail landscape, shoppers expect a seamless blend of online convenience and in-store experience. While price often plays a bigger role online — where the theatre and human interaction of physical retail can't be replicated — bricks-and-mortar spaces offer unique opportunities for immersive storytelling, tactile engagement and brand-building moments that can't be clicked away.

Congress attendees heard from brands and retailers pushing boundaries with experiential retail. Stores are evolving into destinations in their own right: Selfridges, for example, offers a cinema, a skate rink and curated brand events. Its new five-tier loyalty program rewards customers not only for spending money, but also for spending time in-store. Matt Newell and Reid Nakou from The General Store shared their World's Coolest Retailers list, with Korean brands Ader Error and Tamburins taking the top two spots for their distinctive aesthetics, creativity and ability to create cult followings.

Boldness isn't just about spectacle — it's about being bold when it comes to initiatives such as sustainability and community. Ex CEO of H&M Helena Helmersson challenged leaders to remove the frequent conflict between sustainability and core business growth by encouraging long-term thinking and strategic industry partnerships. Ken Murphy, CEO of Tesco, spoke about leveraging the scale of their network to serve communities. Examples include

rolling out EV charging stations to hundreds of stores and running Tesco Community Grants, where customers vote at checkout for local causes to receive funding.

In the end, boldness in retail isn't just about grabbing attention — it's about having the vision and courage to shape the industry's future.

Smarter

Being smarter is about harnessing technology and talent to make better decisions and sharpen execution.

A highlight from the WRC was a keynote interview with Frederico Trajano, CEO of Brazilian retailer Magalu — Brazil's largest retailer. Trajano spoke passionately about Lu, Magalu's virtual assistant created in 2003, who has become a digital star: proof of what 'smarter' can look like in modern retail. In 2022, Lu became the most followed virtual influencer in the world and has partnered with celebrities and brands like Adidas. Lu's strength lies in her adaptability. As a virtual influencer, Lu can evolve her look, voice and persona in tune with cultural trends — without the constraints of actor contracts or the unpredictability of celebrity reputation.

Artificial intelligence was the dominant theme at this year's WRC, with retailers exploring its potential across a wide range of applications.

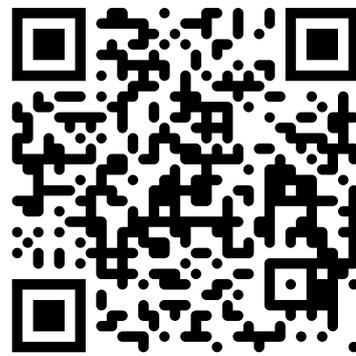
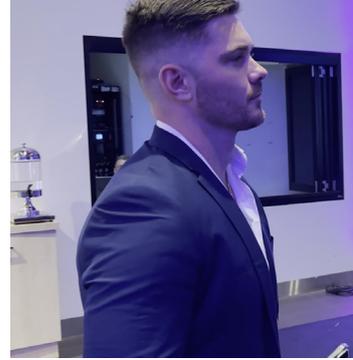
Morrisons, for instance, is using AI to analyse consumer comments, resolve inquiries, improve forecasting and refine range prioritisation, while Tesco has begun testing personalised pricing.

While AI is seen as the next great technology wave in retail, it also raises a fundamental question: how is the industry building the right talent pipeline to manage this shift? If junior roles — traditionally the feeder into more strategic positions — are increasingly automated, how will retailers ensure they are future-proofing their leadership bench?

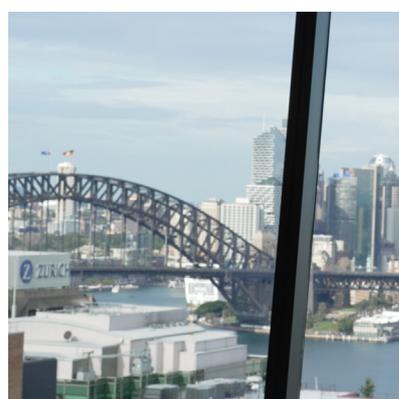
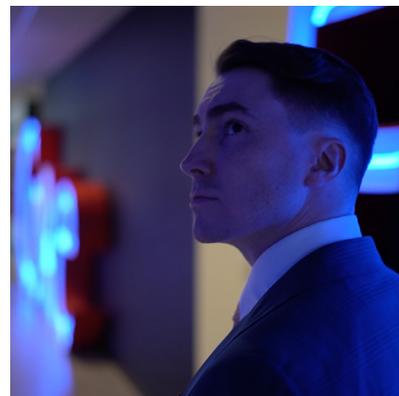
The Future Retail Challenge, judged in part by Bernie Brookes, showcased university students from around the world presenting strategies to attract and retain Gen Z talent. Their recommendations included making job ads more 'social media ready' with less reliance on text, prioritising mental health support in the workplace, offering greater flexibility and providing frequent, personalised feedback.

Engaging and developing young talent through initiatives like the Activate Joe Berry Award, which champions leadership and forward-thinking, will be critical to building a smarter, more resilient retail industry.

"Ultimately, leaders must be willing to fail fast to succeed faster."



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LEADERS IN CONGRESS

The importance of investing in professional development.



By **Tony Klatt**
Retail Tasker, Win on the Shelf

Over the last two years, I have been a board member of the not-for-profit Activate Group, supporting retail industry communication and young executives through platforms like the Joe Berry Award and the newly launched Industry Round Tables. This year, we considered attending the World Retail Congress in London — a key event praised by past Joe Berry winners. Although there are reasons not to go, such as time and cost, it's crucial to invest in professional development.

The World Retail Congress gathers top leaders from retail and manufacturing and includes all forms of products, from food and clothing to furniture, anything sold online or in stores. Industry experts, including Ken Murphy (Tesco), Ira Kalish (Deloitte), and Scott Price (Dairy Farm Group), shared insights on current challenges and opportunities — all this in the first two hours. The three-day event featured store visits, breakout groups and networking. It was non-stop and a 'must go to' for leaders looking for insight into global retailing from the best the world has to offer.

Combining all retail formats in one congress highlights consistent opportunities such as staff, customers, technology, generations, costs and sustainability. The conference features a mix of solo speakers and expert-led panels that engage attendees and draw insights from global leaders.

Rami Baitiéh, CEO of Morrisons, discussed the company's leadership transformation onstage. Under his leadership, Morrisons' financials improved rapidly. When I visited a store in the UK, the manager aligned closely with Baitiéh's focus areas, especially the 5-5-5 strategy: five actions each for customer satisfaction, supplier relations, and cost reduction. This clear approach boosted EBITDA and streamlined decisions, fostering ongoing simplification, modernisation, and team cohesion. It was a stand-out presentation for me and emphasised the importance of having a simple but effective strategy that everyone is part of.

Three rooms offered hourly topic sessions while Bernie Brookes from Australia ran a global university challenge. Top university students competed for international recognition, discussing the theme 'I want a good job but not in retail'. The event showcased creative ways to attract Gen Z into the workforce, highlighting what matters to them and how employers can appeal to this generation. While our business has some Gen Z employees, the presenters gave far greater insight into their needs and wants as employees.

Returning to work, I was energised and ready to prioritise new initiatives for our Business, Retail Tasker, a business that offers a syndicated sales team in food, liquor and pharmacy. I also took the opportunity to refocus on personal priorities. For comprehensive retail insights, a way to remake yourself, step out from the day-to-day and register for next year's World Retail Congress — you won't be disappointed.

“Busy remaking the world, man forgot to remake himself”.

– Andrei Platonov

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