

# Shop In A Box: Feasibility Study

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Inspiring Our Town Centres

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*In conjunction with:*



## EXECUTIVE SUMMARY

The Shop In A Box project envisages revitalisation of our region's main streets by activating empty shops, often called 'pop up shops'. This feasibility study analyses the challenges and opportunities to managing such a program. Through analysis, interviews and an online survey, a vacancy problem has been identified, and positive public support for the project noted. The report discusses key challenges, including resourcing and governance. The benefits and risks to having a regional body such as Great South Coast manage the project, compared to a local organisation, are recommended for consideration by the Great South Coast Group.

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# 1. Introduction

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## **Background**

This project has been initiated by a group within the 2015 Leadership Great South Coast program. The annual Leadership Great South Coast development program is aimed at emerging and new leaders sourced from the diversity of business, government and community sectors within the region. One component of the program is a self-initiated community project.

The Great South Coast comprises six local government areas in a formal alliance (Figure 1).

A number of towns within the Great South Coast are, like many regional areas, facing broad economic challenges, as well as reduced commercial operations in town centres. Population decline and retail sector upheaval are at the forefront of issues.

The project was formally endorsed by the Great South Coast Board on 09 July 2015. The project is supported by the Great South Coast *Economic Pillar Group*, towards its revitalisation goals.



**Figure 1 - The Great South Coast Region**

## **Project Brief**

The 'Shop In A Box' project seeks to create a vibrant town centre experience encouraging local entrepreneurship and drawing tourism. The project aims to reactivate our CBDs through temporary uses of empty shops, modelled on the Renew Newcastle idea of free, short-term contracts between landowners and tenants.

This is a direct attempt at improving the current retail/commercial and street life of our region's towns.

This feasibility study presents a vacancy analysis, stakeholder engagement (via a region-wide survey) and an analysis of the Renew Australia membership packages. Options on how the Shop In A Box concept can progress after completion of this project are presented.

The project aligns to the following strategies within the Great South Coast Strategic Plan<sup>1</sup>:

- **1.3** *Build our leadership and entrepreneurial capacity, with a particular focus on small to medium enterprise and on innovation. P21*
- **1.4** *Develop and communicate a vision for the Great South Coast as a unique and active participant in the global economy, with a recognisable brand and product offering. P21*
- **1.6** *Seek to position the Great South Coast as a premier nature-based tourism destination whilst supporting the development and evolution of our regional tourism industry, generally. P21*
- **4.3** *Increase inclusion and participation in recreation, arts, culture and community life. P27*

## **Renew Australia Model**

After seeing significant job losses Newcastle, NSW faced a deserted central city. A group 'Renew Newcastle' formed and set up contracts between landowners and tenants to have free rent while establishing business. The city has successfully regenerated, in large due to the revitalisation of artists and entrepreneurs using these vacant shops.

The body Renew Australia grew from Renew Newcastle, and for a membership fee provides resources and insurance as a template for other organisations to begin similar projects.

There are a number of benefits to an increase in 'activating' street life, particularly when driven by entrepreneur incubation and business start-ups. The temporary use of shops at no cost can create a livelier atmosphere, increase desirability and land value, draw tourism, create a 'sense of place', and incubates entrepreneurship in a community. In itself, the incubation of entrepreneurship has multiple spinoff benefits including creation of new businesses, retention of youth, and attraction of more entrepreneurs in a virtuous circle. Newcastle remains the prime example of a city that has turned around a derelict town centre to a vibrant, lively location popular for tourism.

The Shop In A Box project, if continued, can lead to widespread reactivation of shopfronts in our region; providing a catalyst for economic and tourism rejuvenation of our CBDs.

## **Types of 'Pop Up' Shops**

Temporary use of shop and public spaces are often called 'Pop Up Shops'. There is no single definition to encompass all the ideas that are possible. A temporary shop can be arts based, a community group, event specific (including clearances), online retailers seeking physical presence, or any type of retail. At its most basic level, it can be a window installation. The terms 'temporary shops' and 'pop up shops' are used interchangeably in this report.

This project is specifically looking at temporary use of privately owned spaces. Public spaces have a different set of rules and guidelines generally administered by a Local Government.

This project is also tailored towards temporary or 'rolling' licences, as opposed to single event pop ups or markets, which are generally organised on their own.

Generally, agreements under the Renew Australia model lead to no cost to the landowner. The costs to tenants are generally payment towards bills and a weekly insurance payment (\$25). Fit-

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<sup>1</sup> Great South Coast Strategic Plan available at [www.greatsouthcoast.com.au](http://www.greatsouthcoast.com.au)

outs may be negotiated between the landowner and tenant; often a pop up shop will not alter the building, but if agreed, the tenant may fit out the shop to suit.

## **Method**

The project method addresses Renew Australia's assessment checklist, listed further below. Part of the project involved interviewing a range of stakeholders (particularly real estate agents) in different towns, and developed a region-wide survey to help capture information.

The project concept is not a new idea, even within our region. Marcus Westbury, a founding force of Renew Newcastle, has previously spoken in Warrnambool. Pop ups shops have also existed in Warrnambool, Portland, Hamilton and Camperdown. They are great examples of what can be achieved, although have most likely relied on landowners' good will and some amount of good faith. No program of temporary shops has managed to stick. This report seeks to identify the range of challenges up-scaling the program may face, to better inform a sustainable project across the region.

Renew Australia asks the following checklist is assessed before undertaking a Renew program. The aim is to understand the readiness of a community for Renew, greatly improving chances of success. The questions are the basis of analysis for this feasibility study:

***Do you have a long-term vacancy problem?***

***Are there people interested and excited?***

***Are there community initiatives or creative enterprises that would be interested in activating a space temporarily?***

***Have you considered who will run the project and the governance structure?***

***Are there potential tenants?***

***Are there potential landowners?***

These questions are considered in the following sections.

The project involved development of a website which outlined the Renew Newcastle concept, provided information on Shop In A Box and hosted a survey. A Facebook page was also utilised to promote the concept and survey. The page was actively marketed to other community Facebook pages.

## 2. Analysis

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### **Renew Australia Membership Options**

The varying packages available from Renew Australia are explored below:

#### **Restart Your Street Presentation Package - \$2,000.00**

Renew Australia will spend a full day in the community. A public meeting can be held to introduce the Renew model, catalyse the full spectrum of the local community or introduce the key principles of how to harness creative enterprises to activate empty spaces.

Renew Australia will tailor each presentation to suit the relevant audience.

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*Pro:* Having an experienced Renew employee present will bolster community support for project

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*Con:* One off payment/event only benefits a certain town directly

#### **Reboot and Renew Training and Support Package - \$20,000**

For existing organisations or associations wishing to start their own empty space schemes but needing assistance on the ground to do so. This package is designed to support an organisation run a Renew-style scheme, operated by existing staff.

Renew Australia will work closely with the group to develop a tailored strategy that suits the needs. Renew Australia can catalyse the project, provide mentorship, hold meetings with key stakeholders, train up an organisation and generally assist.

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*Pro:* Package ensures highly developed feasibility study

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*Con:* Package targeted to early stages of project and does not ensure carry through

#### **Annual Affiliate Renew Membership - \$2,500**

For organisations undertaking a Renew empty space program in their local community. Becoming an affiliate project allows us to help you by providing practical support with issues like insurance, compliance, risk management and funding.

This package is for those who need ongoing support in implementing the Renew model in their community but do not need or no longer require Renew Australia's support on the ground in their community to get it started.

An annual membership includes ongoing advice and support.

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*Pro:* Membership gives insurance and applies to entire region if held by Great South Coast

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*Con:* Payment to be renewed each year, issued to a single entity

#### **Renew Your Community - Complete Package - starts at \$100,000**

Renew Australia will send out an experienced project manager on the ground to design, start and run a Renew program in your community.

They will work closely with key stakeholders in the community to establish a dedicated local Renew organisation, a governance structure and an ongoing management program.

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*Pro:* Guaranteed project manager for extended period to drive results

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*Con:* High financial commitment

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The Renew Australia model and membership is crucial to a sustained pop up shop initiative, for its insurance and contract documents. Annual membership is the minimum requirement for the Shop In A Box project to be taken forward. While pop up shops could be pursued by any individuals, a private agreement may not cover the liability concerns and poses a high level of risk to those parties.

The varying packages can be tailored to the situation and could be considered based upon funding and personnel/staffing resources.

The typical affiliate to Renew Australia is an organisation based in a single town. The potential of a regional body becoming an affiliate has been discussed with Renew Australia. The regional option has not been tested before. A regional affiliate such as the Great South Coast Group would need to prove its ability and commitment to supporting all towns across the region. Renew Australia would not support affiliation of a body representing the region if management support was not provided fairly.

Further discussion on potential management structures is in the following section.

### ***Assessing the Vacancy Problem***

A vacancy analysis of **Portland**'s retail core (Bentinck, Julia and Percy Streets) found approximately 30 of the 150 commercial premises vacant, equating to an approximate vacancy of 20%. As a quantitative statistic this suggests a vacancy problem. It is noted that this was a single snapshot in time. No vacancy analyses were conducted in other towns.

Interviews with local real estate agents confirmed the view that there is a vacancy problem in Portland – both in terms of amount and lengthy periods a shop stays vacant.

Similar views of a vacancy problem were expressed through discussions with real estate agents in **Hamilton** and **Warrnambool**. Warrnambool has had local media coverage of vacancy levels and various attempts to fill its main shopping streets.

The only town to have clear responses that no vacancy issue exists was **Port Fairy**. The town has high tourism and visitor levels and is an attractive retail property market. Understandably, vacant shops are quickly utilised.

Interestingly, pop up shop cultures already exist. Small numbers of shops have been used in Hamilton, Portland and Warrnambool.

Interviews conducted in **Terang** found that there is a low vacancy issue, with reasonably quick take-up of vacancies. Only a small number of visible sites have long term vacancies, due to building condition and ownership.

**Camperdown**, while being noted as having some empty shopfronts, fills any empty spaces during its largest festival, the Camperdown Cruise. There is an existing culture of pop up shops and only a low vacancy problem.

While not involving temporary shop uses, the recent Corangamite Shire Council initiative to fund shopfront renovations/renewals acknowledges the benefits of an attractive, active streetscape.

Smaller towns were not analysed during this project.

In summary, vacancy levels – the 'problem' – varies between towns within the Great South Coast.

## Survey

An online survey was open to any willing participant over a four week period. The questions were targeted to understanding who might be interested in the project, and how. There were multiple choice questions and two opportunities to provide written comments. The survey was marketed via social media, email to relevant groups, and direct contact with real estate agents.

There were over 150 respondents, demonstrating a high level of interest. A wide reach was achievable, particularly through social media. However, being solely web-based limited access to those with an online presence.

In response to the prompt "Please tell us more about your product/service/property idea", 34% of respondents had specific ideas for pop up activities. The recurring themes were:

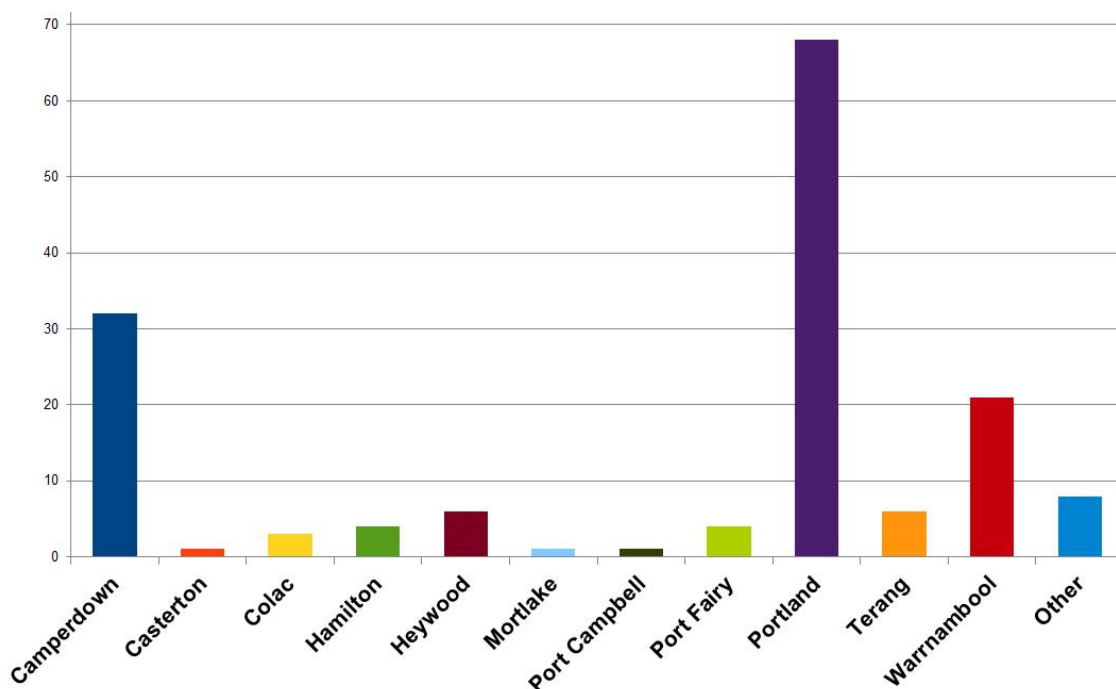
- Selling of their own artwork or craft
- Promoting local events, local clubs and local history
- Providing a service or activity for youth
- Providing a temporary shop front for an established home retail business (cosmetics, antiques, manchester, furniture)

The final question gave the opportunity at add any comment; 18% of survey participants responded. The general themes of the comments were:

- Very supportive of the 'Shop In A Box' concept. 'Fantastic' was a recurring word through the comments
- Wariness of competing with already established local business who may already be struggling and are paying full rentals on longer term leases

The full survey is in Appendix 1, with summary charts below.

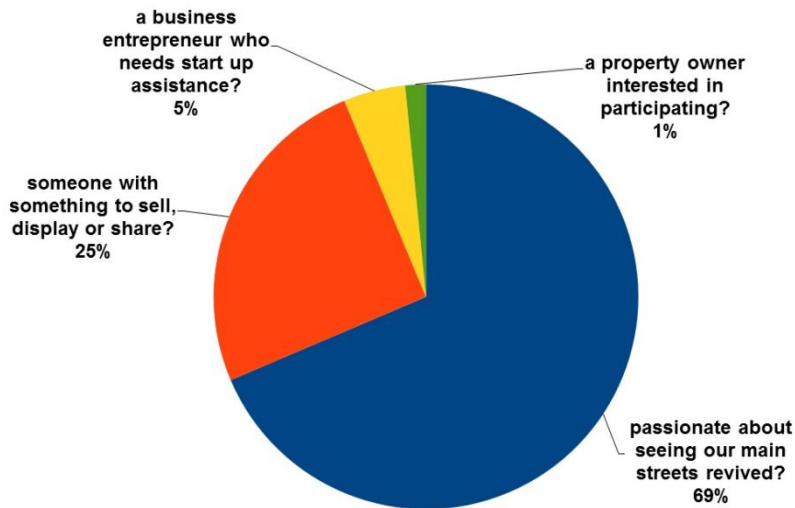
### Q1: What is your nearest town? (number of responses)



- Portland had almost half of all responses, with Camperdown and Warrnambool providing strong response levels
- The influence of the project member locations on response levels is clear

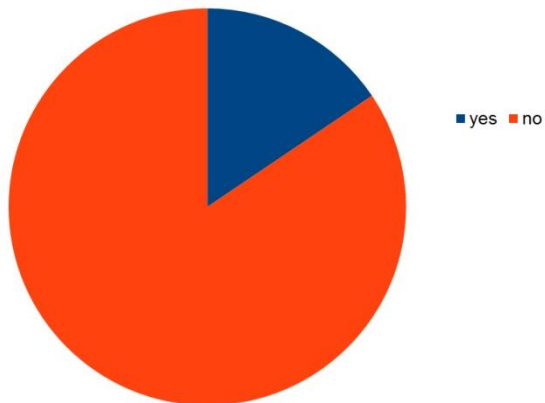


## Q2: Are you?



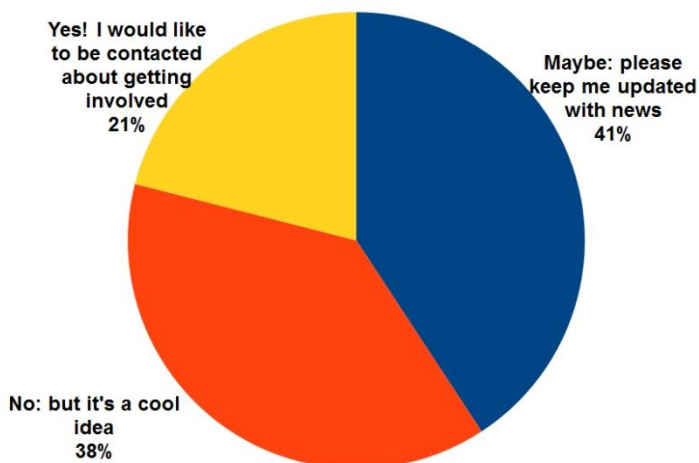
- A third of responses were potential tenants of this concept
- Only three landowners responded, meaning greater engagement is necessary

## Q3: Have you been involved in a pop up before?



- The majority of respondents have not been involved before, while there are some experienced in the concept
- Experience and enthusiasm can be leveraged in progression of the project

## Q4: Are you interested in the development of this project?



- 20% of respondents wish to be contacted directly about progressing the project, another 40% wish to be kept updated
- Contact with respondents can be maintained to continue the momentum around the project

Having such a positive response suggests that those who completed the survey did so because they were already interested or curious about the topic. There was only one set of comments against the project, perceiving it as a direct threat to the respondent's established business.

## **Renew Australia Checklist**

The following questions are discussed as part of the Renew Australia checklist:

### ***Do you have a long-term vacancy problem?***

The vacancy problem has been assessed specifically in Portland and qualitatively acknowledged in Hamilton and Warrnambool. Interviews with a number of real estate agents within the area confirmed there are high levels of vacancies in many towns.

### ***Are there people interested and excited?***

Of the 150+ respondents, 66 people provided their details for further news and potential help with the program. The response is very positive and shows there are a large number of people interested in the concept.

### ***Are there community initiatives or creative enterprises that would be interested in activating a space temporarily?***

A number of community groups were represented in the survey responses, indicating a desire to participate in the filling of empty spaces. There is strong potential to link and cross-promote with existing artist groups.

### ***Have you considered who will run the project and the governance structure?***

This report seeks to provide the background analysis on the feasibility of the project, and the potential for Shop In A Box to commence as an entity. To continue, a sustainable management system needs to be put in place.

From an analysis of examples around the country it is clear to see there are many different ways a pop up shop program can be created. Individual shops can simply be at the initiative of a single tenant or landowner. Most wider programs are grassroots formations of some kind, primarily managed through volunteers. Many Councils have given direct or indirect support (funding, officer time), but this varies considerably.

No program has been attempted over such a wide region. Common themes of other programs include the strong volunteer aspect, local champion/project manager, and a sense of close community ownership.

During interviews with people who have helped manage these programs it was noted that a high level of flexibility – almost being on-demand – is required to be most effective. There are a number of challenges to a regional governance structure/program:

- If voluntary, the workload is too much to manage for one person (or a small group)
- Being on call and able to simply visit each location (to respond or help set up)
- Difficulty getting local community buy-in/ownership – almost forcing the project
- Less connection between a local community and a regional body

Advantages could include:

- Pooling of resources: funding sources, and more likely to afford a part-time position, marketing power
- A single membership with Renew Australia
- If there are no pop ups in one location support can still be directed to other towns, essentially safeguarding the program against down-time in a given location

As mentioned, Renew Australia would consider a regional program if it can be managed equitably. The options for governance are discussed in the following section.

### ***Are there potential tenants?***

From the four week survey, 48 of 150 respondents noted they were "someone with something to sell, display or share", and a further 9 "a business entrepreneur who needs start up assistance". These responses were spread across the region and demonstrate a clear interest as tenants.

It is noted that this initial survey may not reflect the number of tenants actually coming forward for a program. Other factors including start-up costs, security of tenure, and timing come into play.

In examples such as Townsville, the shops were in the same physical area of a derelict mall. By being long-term vacancies and having supportive owners, the pop up spaces had a high sense of security of tenure. Many month-long licence agreements will not bring such security of tenure. Some tenants may consider longer periods necessary to be viable in starting up. These situations essentially depend upon the circumstances of the premise, landowner and tenant and are hard to control.

An Expressions of Interest process may be required to help gather relevant tenants.

### ***Are there potential landowners?***

From the survey, only 3 of 150 respondents were landowners interested in participating. This partly reflects the ability of our survey to penetrate that group of people, but also demonstrates that more work is required to engage and involve landowners across the region.

From interviews, including with real estate agents, it was noted that many towns have consolidated property owners. These conversations noted that in most towns, at least some of the landowners could be interested if more closely involved in the project concept. It was also noted that many landowners do not live in the town, and are viewed as uncaring of the appearance of an empty shop.

For the Shop In A Box project to continue, further engagement of landowners is crucial.

The level to which a landowner may support the program will differ. Contribution will vary, either in licence agreements (rent, utilities), or in shop upgrading (painting, fitout). There may also be differing expectations on what can be done to the premise (painting, signage etc).

Unsafe buildings are not suitable for consideration without upgrades. Again, agreements may vary between different landowners and tenants. Examples in Newcastle and Townsville showed that volunteers or tenants were often willing to help fix derelict premises in return for their use. There is no right or wrong in this model; it is a case of what can be appropriately managed.

### ***Planning, Building & Health Regulations***

There are a number of legislative requirements to consider around the use of land for pop up shops. The relevant Local Government Area enforces the Planning & Environment Act 1987, Building Act 1993, and Food Act 1984. A new use may trigger requirements under either of the three acts – in many circumstances this is a sufficiently large barrier to prevent a temporary use progressing. Temporary uses (beyond a single event) are not recognised separately to permanent uses. Each situation may differ and should be investigated prior to commencing temporary agreements on premises.

**Planning:** All land is subject to a planning zone. Commonly, major town centres will be zoned one of the Commercial zones. Smaller town centres may be Township Zone, and some areas considered for pop ups could be in a Residential Zone. Each zone has different rules on which uses can be undertaken without permission, which require a permit, and which are prohibited. As an example, the Commercial 1 Zone allows nearly all Retail/Shop uses 'as of right'. While in the Township Zone a permit for use is generally required, and in the General Residential Zone it may be prohibited. A Planning Permit for use can present a cost barrier to new uses.

**Building:** All uses are classified into a range of building 'classes'. A change of use (class) requires a Building Permit. Thus, a challenge to quick, flexible pop up shops is when a proposed use is different to the previous use of the building. 'Change of use' permits trigger the need for a range of compliances, including accessibility, which can again cause high upfront costs beyond just the application fee.

**Health:** Any premise preparing food needs to be registered with the local Council. To register (and fit) a commercial kitchen is an inflexible element and unless the shop has an existing commercial-grade kitchen is generally unfeasible for temporary uses.

Any questions that arise regarding these regulations should be directed to the local Council.

### 3. Discussion

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This section discusses some of the principle issues to arise from analysis. A set of options are identified for the Great South Coast Group to consider. There are a number of factors to consider in any progression of the project, and multiple ways in which the concept could be managed.

#### ***Potential Funding Sources***

To continue the Shop In A Box project funding is necessary to cover resource costs. The Great South Coast Group can provide some financial backing, however further fundraising should be considered. Potential sources include the group of 6 Local Government Areas, grant opportunities from bodies such as Regional Development Victoria and Arts Victoria, and even local organisations such as community banks and chamber of commerce/committee groups in the major towns.

#### ***Marketing and Engagement***

If the project is to develop, a marketing and engagement strategy will need to be developed to better engage the broad range of stakeholders. The web platforms used in this project have been successful in reaching a particular audience. However, non-web based marketing would be an important part of engaging landowners and other community members.

There was a clear engagement 'pull' created by the location of the project group members, with higher survey response rates. This illustrates the effect of involving local community members in the project and highlights one of the challenges of a regional program.

#### ***Balancing Support of New and Existing Businesses***

The survey identified the issue of existing business protection; there was some caution noted from existing shop owners. While many people welcome new business activity, creativity, and entrepreneurship, understandably there can be a perception of unfair competition among

existing business owners. Some community members were clear that supporting pop up shops in direct competition to existing businesses would be unfair.

Survey comments noted that the retail sector is already challenging, with peak sales times around Christmas/summer. If pop up shops are allowed to open at those times, with low overheads, it can have significant negative impacts on their business.

Some programs have managed this conflict by only supporting local tenants, by not allowing existing businesses to open branch outlets, and by not allowing direct competitors in close proximity to existing shops. Some of these policies have been utilised to manage itinerant traders, and can provide some guidance.

## **Who Takes Control Next?**

### **Management Options:**

There are two clear governance options to manage the project; the first being run as a regional body under Great South Coast's support, the second as standalone bodies within any given town. Both options require an amount of funding, as well as staff resourcing. Any group (whether Great South Coast or a local body such as Committee For Portland) would need legal advice in setting up with Renew Australia. No recommendation can be made upon which option is best. The decision must be made in full consideration of the issues presented in this report.

1. The Great South Coast Group manage Shop In A Box, providing staff time to coordinate; or
2. A willing organisation or person within a town of the Great South Coast leads a local project (separate affiliation).

There are clear pros and cons to either of the approaches, and much of the decision depends upon the resourcing available. A regionally managed program can draw upon greater resources, while a locally managed project in a town showing high interest could provide the greater catalyst to results.

## **4. Recommendations**

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As stated, there is flexibility in how, and who, manages a pop up shop program within our region. The report recommendations are:

- The Great South Coast Group must consider the issues identified in this report and the resourcing available before deciding upon a governance option.
- To run the project successfully, consideration should be given to a number of tasks: creation of a Steering Committee, fundraising, Renew Australia membership, landowner and community engagement, creation of a list of interested parties (Expressions of Interest ready to allow rapid mobilisation) and whether a paid position is possible.

Management of the website and social media elements can be redirected following a decision on governance. Interim measures could involve management by the Great South Coast, or closing down of the sites.

## 5. Conclusion

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Shop In A Box envisages a revitalisation of our region's main streets based upon re-activation of empty shopfronts. The concept is based upon the Renew Australia model of licensing one-month agreements between tenants and landowners, reducing costs and liabilities to both parties.

There are great benefits to be recognised through such a program, including activation of street spaces, increases in desirability and land value, increasing tourism, creating a 'sense of place', and incubation of entrepreneurship in a community. Incubation of entrepreneurship can help create new businesses, retain youth, and attract more entrepreneurs in a virtuous circle. Newcastle, NSW is the prime example of a city that has transformed itself through this program.

The Shop In A Box report has sought to identify the challenges and opportunities facing a pop up shop program across our region. It relates primarily to use of private land. Use of public land is regulated differently, and there is space for any local Council to be creative on its public land.

The Renew Australia membership options have been assessed. The finance resourcing of the project provides the largest determinant in which package is suitable, with annual membership costing \$2,500, through to the complete 'Renew Your Community' package at \$100,000.

A vacancy problem has been identified in many towns across the Great South Coast, although some towns do not have the problem. An online survey was utilised to gauge interest and identify issues. Over 150 responses were provided. There was an overwhelmingly positive support for the concept.

Major challenges include: engaging landowners, planning and building regulations, governance and management structure, and balancing support of new and existing businesses.

There are two clear paths such a project can take: either it is managed regionally by the Great South Coast, or a local organisation continues in its given location. There are benefits and challenges to either approach, including resourcing, local community input and buy-in, logistics and fairness. There is a clear challenge of managing the project without paid position support.

The Great South Coast Group can utilise this report to consider:

*Can the Great South Coast group resource and manage the project?*

*Or, is it preferred to allow local organisations to run their own town program?*

In determining this question, the Shop In A Box project can grow into the future. This report demonstrates that a program can be run successfully in our region, and that there are alternate ways to achieve this.



## Expression of Interest - Shop In A Box

We are exploring options for revitalising our town centres. Our aim is to make it easy for interested entrepreneurs and artists to link up with supportive landlords and grow new business.

**\*Required**

### What is your nearest town? \*

- Camperdown
- Casterton
- Colac
- Hamilton
- Heywood
- Mortlake
- Port Campbell
- Port Fairy
- Portland
- Terang
- Warrnambool
- Other:

### Are you: \*

- someone with something to sell, display or share?
- passionate about seeing our main streets revived?
- a property owner interested in participating?
- a business entrepreneur who needs start up assistance?

### Please tell us a bit more about your product/service/property idea:

### Have you been involved with a pop-up store before? \*

- yes
- no
- Other:

### Are you interested in the development of this project? \*

- Yes! I would like to be contacted about getting involved
- Maybe: please keep me updated with news
- No: but it's a cool idea
- Other:

### If you would like us to stay in touch, please provide us with an email address or phone number.

We will add you to our mailing list if you leave your details.

### Please add any further comments or questions

Thank you for your time