

BSNS 6370 Marketing Plannning Assignment 1

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1. INTRODUCTION

Diamond Takeaways (henceforth referred to as DT) - is a fast food outlet, supplying freshly prepared hot food to order, with a menu based around Chinese and European foods. Situated on the corner of Market Road and Great South Road in Remuera (Figure 7.), DT has broad market appeal, is on the junction of two very busy roads, and is within a short distance to many businesses and residences.

DT is 40 years old, "has been serving quality food since 1973 to the Remuera community and beyond" Diamond Takeaways (n.d), and has a very loyal following gained over these many years. The markets that DT service seem to be mainly geographical, as DT has just the one store, and they have a free home delivery service within a 3km radius (Figure 6.), but because of their good reputation, word-of-mouth is possibly their most effective form of marketing, and may extend the market beyond just geography.

2. PESTE ANALYSIS

Political and Legal/Regulatory:

• DT is subject to local council grading of food preparation businesses. DT has an "A" grade which indicates they are meeting their obligations.

• DT must meet all tax obligations

• Must meet health and safety regulations in regards to staff and customers

Economic:

Over 40 years DT would have seen many factors affect the local and global economy. In the most recent global economic recession, most businesses in NZ have been affected, however other fast food chains such as KFC have prospered in this period. DT may have been fine during this period, given their strong reputation, the high quality and the relatively affordable prices of their products.

Socio-cultural:

In New Zealand, and more specifically Auckland, demographics have changed dramatically in 40 years. Auckland has become a very culturally diverse city, and the increase in residents of Asian origin, particularly in DT's geographic area has created opportunities and threats. New markets have been created, and also a more readily available supply of resources are now available i.e. Asian fruit and vegetables, but also more competition has been created - with many competing businesses opening up city-wide.

This geographic area is also a very highly sought after area to live in, for various reasons such as schools (...DT is in the Auckland Grammar and Epsom Girl's Grammar zones), as well as the socio-economic

make-up of the area. This demand makes the demographics of the area somewhat dynamic, but there may be implications for DT in the long term, as a more sophisticated demographic, may demand a more sophisticated food outlet. With this sophistication, customers may demand other types of food such as low carb, low fat, or generally healthier options. The Asian population may also create opportunities and limitations, as Asian residents of the area may make their own food at home and not require takeaways like DT. This statistic is quite significant in the area, as the Asian population of our target geographic area is 39.7%, yet only 18% of the Auckland City area (Statistics NZ, 2006). Also, for peoples of Asian origin, going out for food can be a very social occasion, and as DT has no space for tables, this may also be limiting to future growth.

Technological:

• Greater requirement for internet presence. (DT has a presence online with their website and their Facebook page)

- New systems available that allow online or mobile based ordering (i.e. via website or App)
- Hands of ordering systems, i.e. kiosk based self-ordering and payment
- Energy efficient and healthier methods of cooking
- CRM customer relationship management i.e. loyalty schemes

Environmental:

With the effects of global warming becoming more apparent customers will become more demanding when dealing with businesses that aren't taking their responsibilities seriously. DT currently uses single use plastic containers and utensils for their products, and these have a detrimental effect on the environment. DT could replace these with readily available recyclable and biodegradable containers and utensils. Also, the delivery vehicle DT uses, would be using fossil fuels. DT could replace these with more energy efficient and less polluting vehicles - which should also have the added benefit of being cheaper to run. Any marketing material that promotes these improvements would have beneficial effects to the DT brand.

3. PORTER'S FIVE COMPETITIVE FORCES ANALYSIS

<u>Rivalry among present competitors:</u> This force measures the intensity level of investment placed in an industry. Rivalry occurs when other firm's products are a close substitute's product for each other. High investment industries are less profitable because there is a pressure on price, thus producer decrease price to meet sales figure. Low investment intensity is more profitable because of the low cost in running the business. The restaurant/ takeaway industry is extremely competitive. There are a number of food outlets that include takeaway options, in close proximity to DT. There is no dominant firm selling Chinese and European foods in this way, but there are many small ones. DT's major competitor is Kiwiana Takeaways (Figure 11.) because they are directly opposite DT, selling some similar foods, and have a very well presented store design.

<u>Threat of New Entrants</u>: A second force affecting industry attractiveness is new competitors that can bring market share down. The greater the number of threats, the less attractive a industry will look to new entrants. Within the food industry the set up cost is relatively high. Restaurants need to register under the Food Hygiene Regulations 1974, and undergo a food and safety program. As well as requiring a zoning license and follow with current building requirements.

<u>Bargaining Power of suppliers:</u> is the third focus that determines the attractiveness of an industry. This is largely to do with price and numerous terms and conditions of sale. The power of suppliers is increased when the cost of switching and substitutes is high. There are a number of similar suppliers in the food industry; therefore the attractiveness of the industry is high to new investors. DT have a vast number of suppliers that the company can choose to buy from. However the price of produce such as meat and vegetables can fluctuate seasonally, due to the limitations of supply. Because there are a large number of suppliers, some power should still remain with the DT business.

<u>Bargaining Power of Buyers:</u> Customers are constantly looking to reduce buying cost. This is the control a buyer has to the products being offered. The lower the power of buyer (customers) the more attractive the industry seems. The power of buyers at DT is high because there are substitutes being offered from other takeaways in the surrounding areas. DT is well known for the quality of their products, and some products such as the Lemon Chicken are quite unique, but customers may seek alternatives if the price for the product becomes too expensive.

<u>Threat of Substitute Products:</u> These are alternative products that serve a similar purpose. These are products that are not similar to a competitor, like products such as frozen meals as opposed to the food of others in the fast food industry. DT's product has a low level of substitution, and they still have the element of convenience that customers are seeking.

Please refer to figure 1. In the appendices for ranking of the forces.

4. GE MATRIX ANALYSIS (figure 2 & 3)

4(a). GE matrix analysis of Market Segments

The market segments that DT operates in are influnced by demographic, and sociocultural factors.

Demographically, DT's market size could increase in the near future, with a growing middle class meaning that consumers will be able to afford DT more than once a week. However, the sophistication of the area is also changing which means that residents in the area may be more health conscious, meaning parts of the current menu may see a decline in sales. Increase in the size of the population of people of Asian origin will create opportunities and threats to the the market size for DT, thus having a potential increase or decrease in their current market size. Menus may need to be revisited to address this change in demographics. The sociocultural segment for DT is a rather important part, ethical business will become increasingly important to keep consumers happy. Introducing healthier oils and premium quality meats will see an increase in attractiveness to customers, especially if they are worried about the meal's nutritional value. Consumers do want healthier alternatives, potentially creating a new market of people for DT to target. By developing the current menu and adding new and healthier options, customers will be more willing to purchase from DT than from competing takeaway stores.

New technology has changed how DT operates and can operate in the future. Computerised tills, inventory databases, stock ordering systems, staff and management use of smart phones, and social media for promotion - the technological developments can also effect distribution and packaging, with eco-friendly packaging now available, and GPS integrated smart phones available when they make home delivers. All these things have the potential to add value to the service aspects of the DT brand.

• The business's competitive strength is rated for each segment

The competitive strengths for DT is the history DT has in the Remuera area, and their good reputation for good quality product, which has ben shared through of word-of-mouth. Also, being well established, DT has developed a very effective production method, taking a very short time to produce quality food. Having many cooking stations and a full contingent of staff reduces the waiting time during busy periods, creating what seems to be faster production than competing operators. The reputation of DT is difficult to replicate and is highly sought after; being around for 40 years creates a certain image in customer's heads. What this means is that the business has extensive past knowledge of how takeaways are run and how to create a longevity in a very competitive industry, but DT may still be required to evolve their image in the years to come. Having many suppliers that DT would be able to choose from creates a certain purchasing power for them, and also being in the industry for such a long time they would have

created relationships with and knowledge of thier suppliers.

- Summary of the results

Using the GE matrix and evaluating competitive strength and market attractiveness DT has shown to be an "invest" company in the matrix. The industry attractiveness and businesses competitive position is just above medium on either side of the matrix for DT in their current market segments. The industry attractiveness and competitive strengths for some variables were high and a few were low, which made DT an Invest company. From the market attractiveness and competitive strength analysis above it is clear that DT should invest in their company due to the fact that the market size has growth potential, and technology is making it easier for consumers to find DT, and for DT to modify their business methods. Because DT already has a good reputation and client base, there is scope to invest further in the company, given the positive feelings within their current customers and the community surrounding DT.

4(b). identified segments and key attributes

identified segments -

• The main source of income for DT, will come from residents who live in the areas surrounding DT. The demographics of customers in the area, are middle to upper middle class including new entrant customers, like the rising middle class and new immigrants.

DT is situated where potential customers are wealthy enough to afford DT on a regular basis (i.e. weekly).

• Sociocultural customers will be a new group to the market, being the healthy and eco-friendly growing market. These customers will have a need for the company to have business ethics, meaning that the company must use healthier ingredients, and use products that are eco-friendly like cleaning products, to gain these customers business.

 Consumers that are out of the geogreaphic area can use technology to search for recommended Chinese or European takeaway shops in Central Auckland and find DT. DT's customers are technologically savvy, but internet based recommendations can entice new customers that don't know much about them – via DT's website or social media sites. These sites can be constantly updated by the customers which adds value to the business.

• DT relies heavily on word of mouth, but "WOM" is not mass media, and can miss targets. Consumers that are out of the word-of-mouth sphere of influence are out of reach of DT, especially as they do not seem to engage in any kind of marketing. This reliance on word-of-mouth, while it reaches a variety of customers, it will also miss the many.

- Attributes most relevant to each customer type stated and explained.

• DT can take advantage of technolocal development, by having better service, website, company information than their competition. Therefore if one of these potential customers was to search using technology for a recommended takeaway, they would find DT easily.

• The main attribute for the demographic customers of DT would be the willingness to spend their earnings. DT can make their products so desirable that consumers would rather spend money at their shop rather than competitors or in different industries, for example the supermarket or a restaurant.

• Sociocultural consumer's main attribute would be their integrity, their values and beliefs, when choosinf which type of food they want to purchase. If DT can create a healthier menu and use the ingredients that these customers approve of, then they would attract a lot more people from this from this segment, potentially creating an increased amount of profit in the future.

5. SEVEN DOMAINS OF MARKET ATTRACTIVENESS ANALYSIS

MARKET DOMAIN (MARKET ATTRACTIVENESS) - MACRO LEVEL (EXTERNAL)

Political/Legal

The current political environment of the area is loyal to centre right political movements i.e. the National Party. The aim of this current government is economy growth. With many policies aimed at increasing markets and jobs for the future development of the country. This has resulted in building stronger business networks for business owners. The economy is fairly stable financially, meaning those in the area will feel more comfortable about spending money on going out for food.

Socio-Cultural

As New Zealand is a diverse multi-cultural country we have a variety of food options. Consumers look for a no fuss, fast meals at low prices. In recent years there has been an abundance of exotic food options. The food industry has seen a sudden change in trend where consumers are seeking sophistication and have access to diverse foods and cultures. The most significant trend in food is a focused on health and nutrition. Customers are looking for healthier and natural food such as organic vegetable, this trend is seeing food businesses, and owners are beginning to develop more diverse products to attract these new customers. More and more customers are dinning out, as it is relatively affordable and they have many options to choose from. Diamond Takeaway has been in the fast food industry for 40 years and have survived changes in the fast food industry, from being the only exotic restaurant in the area, to battling competition from similar producers. Diamond Takeaway is fast food available for all varieties of consumers at reasonable prices.

Technological

Modern technology has undergone vast changes; consumers are much more up to date with the latest technology. Technology has changed how businesses operate; the focus has shifted to how goods and services can be exchanged more effortlessly. Technology development has a profound impact on how businesses sell their products. Diamond Takeaways has a website which features thier products and contact information for phone orders. The business has also got a Facebook page, to engage with their customers, and to promote their products - keeping the customer involved through the use of polls (figure 9.) and news items.

Environmental

Residents would have concerns about the look of and the visual effect to the neighbourhood. Also there will be and increasing number of people who are increasingly conscious of environment issues such as pollution and recycling. Consumers have grown conscious of environmental issues such as pollution and recycling and DT will in future have to address the use of single use plastic packaging.

MARKET DOMAIN - MICRO LEVEL (INTERNAL)

Identified Segments:

local residential (evening and weekend) + local businesses (lunch) + passing traffic (lunch/dinner – weekdays)

The fast food market is a highly profitable market because the resources needed to run a business is easily accessed at lower prices. Diamond Takeaway gained its popularity through word of mouth, the business has created a stable loyal customer base that have spread the positives of the business to other areas which includes great service and quality food. The target audience of the Diamond Takeaway are middle and upper middle class buyers who are capable of paying a greater amount for the products. The average price of a dish at the takeaway is \$10 which is a reasonable price, for the customers who are mostly individuals and families.

INDUSTRY DOMAIN - MACRO LEVEL (EXTERNAL)

Politial/Regulatory – increasing political pressure may come on the Fast Food industry to supply healthy food, as national health levels, and the cost for health services increases over time.

Economic – "Fish and Chips, Ethnic Food, Hamburger and Chicken Takeaway - worth \$697million in 2008" (Restaurant Association of New Zealand, 2008) These statistics indicate the industry to be worth a great deal in the year 2008. As the economy improves, the value of the industry should also continue to increase.

Socio-Cultural – People in general are increasingly busy, and time-poor, which means that the fast food industry will continue to have customers. As competitors in the industry adapt to an increasingly sophisticated consumer, others in the industry will have to keep up to ensure they remain competitive.

Technology – The industry will continue to use tried and true methods of food production, but the way in which they promote themselves will continue to adapt with the needs of consumers, and the technology they use, is smart phones and tablet computers.

Environmental – If the bigger players in the industry start to shift to more ethical and sustainable methods of packaging their goods, consumers will start to demand this of all in the industry. Until that time, it may take a while for a switch to occur, and only smaller niche players will do this.

INDUSTRY DOMAIN - MICRO LEVEL (INTERNAL)

- Price/Quality=value for money
- Long established history
- good reputation

TEAM DOMAIN - (MISSION, ASPIRATIONS, PROPENSITY FOR RISK)

- Mission: Provide quality and affordable Chinese and European food to the surrounding neighbourhoods.
- Current aspirations seem to be "more-of-the-same"
- Averse to risk and/or additional costs i.e. poor branding and exterior store attractiveness (Figure 10.), single store only (no branches).

TEAM DOMAIN - (EXECUTION CAPABILITY)

- Known for preparing good quality food.
- Produce food very efficiently, this is very apparent at busy times.
- known for consistency can expect same quality food and service at all times.

TEAM DOMAIN – (CONNECTIONS OR NETWORKS) - CONNECTEDNESS - UP, DOWN AND ACROSS THE VALUE CHAIN

Established supplier network

Good management of stock

Day to day running remains efficent and consistent

Free Delivery service remains a important aspect of the marketing and service strategy

marketing and sales – In store service and sales has ensured repeat customers, but a greater marketing strategy is not clearily defined.

PART B - BUSINESS ANALYSIS

1. ANSOFF MATRIX

Currently DT relies on word of mouth and an out dated social media site to maintain their position in the market. Although we can assume that sales are steady enough to warrant no action in the advertising and marketing sense, this would result in little to no growth.

In order to determine the future growth of DT in the fast food industry, an Ansoff analysis has been undertaken. From this initial assessment we have identified that it would be unwise for this particular business to consider producing any new products (currently 132 unique items on the menu) and instead, should focus on the further market development of current products. Keeping this in mind, we focused on Market penetration strategies and Market development strategies; our discussion of this is as follows:

MARKET PENETRATION STRATEGIES ON CURRENT PRODUCTS WITHIN THE CURRENT MARKETS

DT has the potential increase product usage, market share and quantity of their popular and unique Chinese food dishes with the use of marketing and advertising strategies. Currently DT has no real marketing scheme which leaves word of mouth, a social networking page and their out-dated website as the only avenues used to promote products. Advertisement is also just left to the social network sites and their menu which can be obtained online or in store. Even by doing a small advertising campaign would have the potential to increase DT share of the existing market. An example of this would be advertising in the local suburban newspaper (The Central Leader) and putting up leaflets in letterboxes and local community pin-boards. An improvement of the product information on their website would also benefit DT.

As DT is a fast food store it appeals to broadly to families, couples and workers coming, for lunches or evening meals. To capitalize on repeat purchase of high demand items, DT should look at further options of creating bundle meal deals with popular dishes. In accompaniment with this, if DT was to set up an online and/or app based ordering system, it would allow for DT to generate more customers, especially those looking for meals after work in the evening, and live in the surrounding area, or pass by as they drive.

MARKET DEVELOPMENT STRATEGIES ON CURRENT PRODUCTS WITHIN NEW MARKETS

DT has the potential to expand geographically. Taking into consideration the above recommendations, if DT increased advertising and marketing, and the current customer base expanded, the geographic expansion is a realistic next step. Already many customers will travel across Auckland to get to DT, and if DT was to select another central suburb for geographic expansion they could potentially do very well, but it would require the current store to be revamped, and any subsequent stores to be created following the same guidelines.

NEW PRODUCTS IN CURRENT MARKETS AND NEW PRODUCTS IN NEW MARKETS

As mentioned at the beginning of the Ansoff analysis, it would be in DT's best interests to not develop further products, or look at diversifying by entering new markets, with new products, due to their already extensive product range. However DT could look at product development of existing stars, question marks and cash cows. For example, they could take their popular lemon chicken dish and turn it into a burger or "double down" type product (i.e. layers of chicken and cheese).

2. BOSTON MATRIX PRODUCT PORTFOLIO ANALYSIS (Figure 4.)

DT has 132 food products on their menu, and due to the size of the menu we have decided to focus on the top seven food items, in correspondence with the poll (figure 9.) found on their social media site (Diamond Takeaways, May 2011). Along with this poll we have used a process of elimination to select DT's stars, cash cows, question marks and dogs. The products we will be categorising are DT's Lemon Chicken, Diamond Fried Rice, Sweet and Sour Pork, Nasi Goreng, Steak and Black Bean Sauce, Singapore Fried Noodles, Sweet and Sour Chicken, Egg Foo Yong, Toasties, Donuts, Vegie Burger and Vegie delight.

DT's most popular product and signature dish is their Lemon Chicken. While we could consider this a "star" product as it is quite unique to the takeaway foods industry and continues to bring in new customers, we consider this a cash cow. Thus DT has no "star" products. The reason behind this is that the product has existed within the current market for a considerable amount of time, and as such currently isn't significantly increasing in sales. Nevertheless, the Lemon Chicken dish is incredibly popular and maintains a high potential for sales. We also consider Diamond's Fried Rice, Sweet and Sour Pork, Nasi Goreng, Steak and Black Bean Sauce, Singapore Fried Noodles and Sweet and Sour Chicken as cash cows. In order to re-invent these cash cows and potentially develop them into stars, we would recommend an advertising and promotional plan. From this, the potential to expand geographically as mentioned in the Ansoff analysis, will increase the profitably of the business. Along with these products we also consider fish, chips and other fried options as cash cows, due to customers perceiving them as a "staple" product.

For DT's question marks we have identified Egg Foo Yong and other specialised dishes. The reason being, the lack of knowledge any potential customer has about them. Again, these question marks have the potential to be "stars", if the right advertising and marketing plan is applied.

Finally, we identified Toasties, Vegie burger, Donuts and Vegie Delight as the dogs of the business. The reason behind this is the lack of advertisement for these items and also the lack of connection between these products and DT's core range (i.e. Toasties lacking relevance to Chinese takeaway shop). However, we believe that the Vegie burger and Vegie delight dish may have the potential to become incredibly profitable to DT if they chose to promote these products to Vegetarians, thus expanding their customer base and creating another "star" product.

3. MARKET SIZE ESTIMATE (figure 5.)

Because DT is a local business, we segmented the market geographically, identifying the residents of the areas surrounding DT's location. As their products appeal to a broad market, we selected an age range between 15 and 54, both male and female, and we sourced our data from Statistics New Zealand. This was our primary target market.

We also identified the potential of passing traffic as a secondary target market, and sourced this data from Auckland transport.

DT makes free deliveries within a three kilometre (Figure 6.) radius of their store, and we believe this to be the greater part of their sphere of influence.

We made our calculations based on our market/s, the average price of products from DT, and extrapolated this data over a day, a week and a year, to estimate gross returns, with overheads yet to be accounted for.

Based on our calculations, capturing just 1% of the potential market means the returns for this business can be quite substantial, estimated at \$1,262,206 gross annually. Our calculations also indicate that if DT had a strategy of increasing this to even just 2% of their market/s would mean exceptional returns. Building on the reputation built over 40 years, DT has the potential to expand beyond their current location, but a more professional branding strategy is required. This strategy would initially need to be implemented should DT wish to capture the secondary market we identified, passing traffic, as the outward appearance of the store (Figure 10.) does not in anyway entice passing traffic to stop and purchase their products. Also with the demographic of the surrounding areas being very much middle/upper middle class, the market will start to demand more sophistication, and the Kiwiana Takeaways (Figure 11.) directly opposite DT, may be stealing business because of this very reason.

CONCLUSION

We have found the DT business to be a very promising enterprise, one that has the benefit of being well established, of consistently good quality product and service, with a very good reputation among its customers. However, there are various areas such as the outward appearance of the store (Figure 10.), and general brand management, where DT is losing value, and this is affecting DT's potential for sales. If DT addresses these issues, DT may be able to expand their operations beyond the current store, which will give DT much great returns in the future.

Reference:

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APPENDICES:

Figure 1.

RANKING OF IMPORTANCE OF PORTER'S 5 FORCES TO DIAMOND TAKEAWAYS

Rivalry among Present Competitors	4
Threats of New Entrants	3
Bargaining Power of Suppliers	3
Bargaining Power of Buyers	4
Threats of Substitute Products	3

1= Low 5=High

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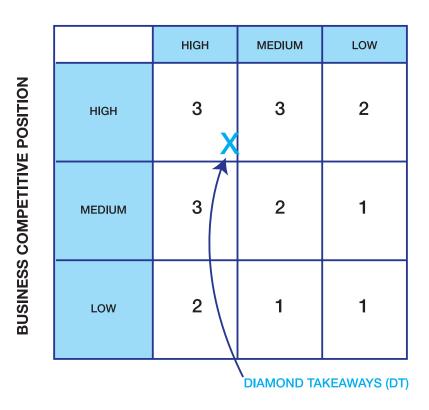
EVALUATING COMPETITIVE STRENGTH AND MARKET ATTRACTIVENESS

COMPETITIVE STRENGTH DIMENSIONS	5	ar 2	ATIN	₩G (4	F	
Market share.		X				
Managerial skills.		X				
Effective production				X		
Competitive technology			Х			
Image				Х		
cust competative				X		
distributors		X		4	×	
suppliers.				$\boldsymbol{\lambda}$		
1.1						
Total		-	25	-		
Average		3	1.12	25	1	2.875.
MARKET ATTRACTIVENESS DIMENSIONS	5+	R		NG	5	
Price levels				X		,
Competitive intensity					Х	-
Crowt. regulations			X			-
Technological lettel		Х				-
Industry growth rate			Х			-
lavar market to sustain competition				X		-
loldistig demand high a low			X			_
Targe number of well for an cell competition.	-	Х	-			-
Total			26			-
Average		2	- 2"	~		2.75.

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Figure 3. How DT fits in the GE Matrix.





3 - INVEST/GROW

- 2 SELECT INVESTMENT / MAINTAIN POSITION
- 1 HARVEST / DIVEST

Figure 4. BCG Boston Product Portfolio Matrix

Stars	Question Marks
	 Egg Foo Yong Other specialised dishes fish, chips and other fried options
Cash Cows Lemon chicken 	Dogs
 Diamond fried rice sweet and sour pork Nasi Goreng Steak and black bean sauce Singapore fried noodles Sweet and sour chicken 	 Toasties Donuts Vegie Burger Vegie delight

Figure 5. Market Size Estimate by The Chain Ratio Method

GEOGRAPHIC SEGMENTATION

	Target Market = 21476 individuals aged 15-54
	Total value of all items on the menu = \$1326.30
÷	number of items on the menu = 132
=	average cost of item = \$10.05
1%	of 21476 individuals
=	214 individuals daily
x	\$10 average spend
=	\$2140 daily
x 7 days	= \$15033 weekly
x 52 weeks	= \$781,726.40 annually

PASSING TRAFFIC

	Target Market = 13192 average vehicles daily (7day average)
	average cost of item = \$10.05
1%	of 13192 vehicles
=	132 vehicles
x	\$10 average spend
=	\$1320 daily
x 7 days	= \$9240 weekly
x 52 weeks	= \$480,480 annually

TOTALS

Geographic	= \$781,726.40 annually
+ Passing Traffic	= \$480,480 annually
Total	= \$1,262,206 annually

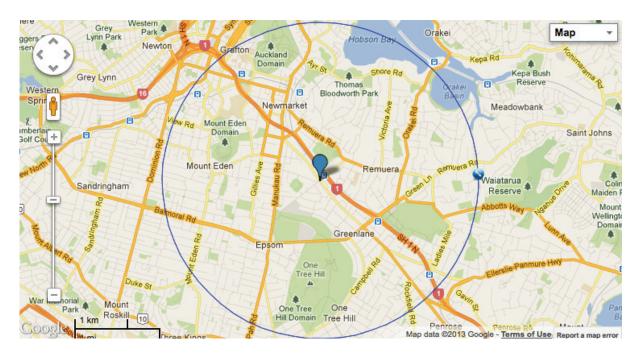


Figure 6. Map – 3km Radius

Figure 7. Location Map



Figure 8. Menu





Figure 9. Facebook Poll of Favourite Dishes

Diamond Special Fried Rice	+15
Lemon Chicken	+17
Sweet & Sour Pork	+13
Nasi Georeng	+4
Steak and Black Bean Sauce	+2
Singapore Fried Noodles	+2
Sweet & Sour Chicken	+2
Small white rice	+1
Combination fried rice	+1
+ Add an answer	
Comment · Share	
Write a comment	
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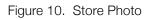




Image sourced from maps.google.com

Figure 11. Competitors – Kiwiana Takeaways



Figure 12. Existing DT brand mark

