Sydney Food Trucks Field Trial

March 2013

Prepared for City of Sydney

WOOLCOTT RESEARCH

Contents

Executive Summary

This report provides a summary of the results of the City of Sydney Food Trucks Field Trial, which was conducted in January and February 2013.

Key findings include:

- A relatively young demographic of visitors (peaking in the 25-29 age range at 29%), who tended to live in Inner Sydney (55%).
- Just under half of all respondents (44%) indicated that they had travelled specifically to the location/ area to eat at the Food Truck.
- The most common motivators for visiting a Truck were the convenience (33%), followed by the quality of the food (25%). Many respondents also mentioned the novelty of the Trucks (23%) or wanting to try something new (19%).
- The Food Trucks were viewed very positively, with all perception ratings (friendliness of staff, convenience, attractiveness, quality, affordability) scoring above 7 out of 10.
- Customers were clearly impressed with the Trucks, with an overwhelming 98% agreeing that they supported the Food Truck initiative. The Trucks were also seen to make the area safer (72%) and more welcoming (92%).
- When asked for suggestions for improvement, 38% thought that no improvements were needed. However, the most common suggestions were to increase accessibility (through increasing the number of Trucks and the number of trading locations).
- While some would have eaten at nearby eateries, the Trucks were also generating new business, with the most popular alternative to eating from the Truck being to eat at home (34%).

1. Background and Research Objectives

In 2012 the City of Sydney Council commissioned a one-year trial of nine food trucks operating across the City of Sydney. These trucks move between a number of locations and serve a unique offering of gourmet food. The Sydney Food Truck trial was born out of the OPEN Sydney Late Night Economy Consultation which found that many people were craving more food options at night. The trial is operating between May 2012 and May 2013 with food trucks operating both during the day and night with the aim of diversifying Sydney's food offerings.

As part of a wider evaluation process the City required a Food Truck Visitor Survey to be conducted to collect statistical data from customers at the food trucks. Surveys were to be completed covering all Food Trucks and locations (on-street and off-street).

The primary research objectives for this investigation were to understand:

- If there is a likely economic benefits of Food Trucks to the areas in which they operate (e.g. whether or not the Trucks encourage visitation from people other than residents);
- Reasons for visiting the area and participation in other activities in the immediate area;
- Perceptions of the Food Trucks (in terms of affordability, quality, convenience, etc.);
- Sources of awareness of Food Trucks in general as well as for specific locations;
- Impact on feelings of safety and inclusiveness in 'city life';
- Visitor demographics and basic information (demographics, mode of transport, visitor companions, frequency of visitation, motivation for visiting, etc.);
- General support for the Food Truck initiative; and
- Suggestions for improvement.

2. Research Design

A face-to-face/intercept interviewing approach was adopted for the on-street and off-street locations that each of the Food Trucks visit.

There were eight (8) Food Trucks in operation during the fieldwork period, and the City was initially seeking to have each of these Food Trucks surveyed at least once. Additionally, each of the on-street and off-street locations were requested to be surveyed at least once.

Interviewing was carried out over a 4 week period from the 23rd January – 16th of February 2013 with the target number of interviews being N=500. However, given that customer numbers were not known at the time, it was decided that a set period of time (108 interviewing hours) would be assigned to the exercise, in which as many interviews as possible would be obtained.

The ten on-street DA approved trading locations were as follows:

- Belmore Park;
- Hyde Park North;
- Queens Square;
- Victoria Park (City Rd / Broadway);
- Chapman Rd Carpark at Bicentennial Park / Federal Park Glebe;
- Sydney Park;
- Customs House forecourt;
- Macquarie Place (corner Bridge St City);
- Pitt St Mall; and
- Pirrama Park Pyrmont.

Additionally, there were 5 on-street locations which are coordinated by Truck operators and could be anywhere within the City of Sydney Local Government Area (LGA).

However, it should be noted that the locations of Macquarie Place and Hyde Park North were not serviced during 'normal' operating periods (i.e. excluding Festivals and other special events) by the Food Trucks during the fieldwork period.

A total of n=408 valid interviews were collected, and the distribution of these interviews by Food Truck and Location was as follows:

TRUCK	Off Street Locations %	On Street Locations %	Total %
Agape Organic	17	0	17
Al Carbón	0	0	0
Bite Size Delights	3	0	3
Cantina Mobil	4	21	25
Eat Art Truck	2	3	5
Tsuru	0	0	0
Urban Pasta	11	14	26
Veggie Patch	14	10	24
TOTAL	51	48	100

While the target end sample was n=500 completed interviews, there were a number of factors that prevented this from being achieved:

- The approved questionnaire was slightly longer than was originally anticipated;
- There were numerous 'wet weather' days during the fieldwork period;
- There were some cancellations/ 'no shows' by Food Truck operators;
- Some of the planned Food Truck shifts did not commence on time;
- Customer numbers were not consistent by site or time of day;
- Some trucks were not operating on street/ some did not operate at all.

Additional Data Gathering

A decision was made to further enhance the research data by the addition of visitor counts (and observational measures) that were recorded during the majority of interviewing shifts.

This involved stationing an additional staff member with a 'click-counter' and tally sheet (for observational measures) to measure the total number of visitors over the interviewing shift (by hourly intervals).

A total of the record sheet utilised for this activity can be found at Appendix B.

3. Respondent Profile

Within the achieved sample of n=408, the majority of respondents lived in Inner Sydney (55%), and were under 40 years (NETT 80% under 40). There was a slightly greater proportion of female respondents than male (54% compared with 46% respectively).

The full breakdown of home location was as follows:

	Total (n=408) (%)
Home location	
Inner Sydney	55
Eastern Sydney	9
Lower Northern	6
Inner Western	4
Northern Beaches	4
St George/ Sutherland	4
Central Northern	3
Blacktown	1
Canterbury/ Bankstown	1
Central Western	1
Fairfield/ Liverpool	1
Gosford/ Wyong	1
Outer Sth Western	1
Outer Western	1
Other NSW	4

Interstate (VIC, WA, QLD)	1
Overseas	4

The full breakdown of age brackets is as follows:

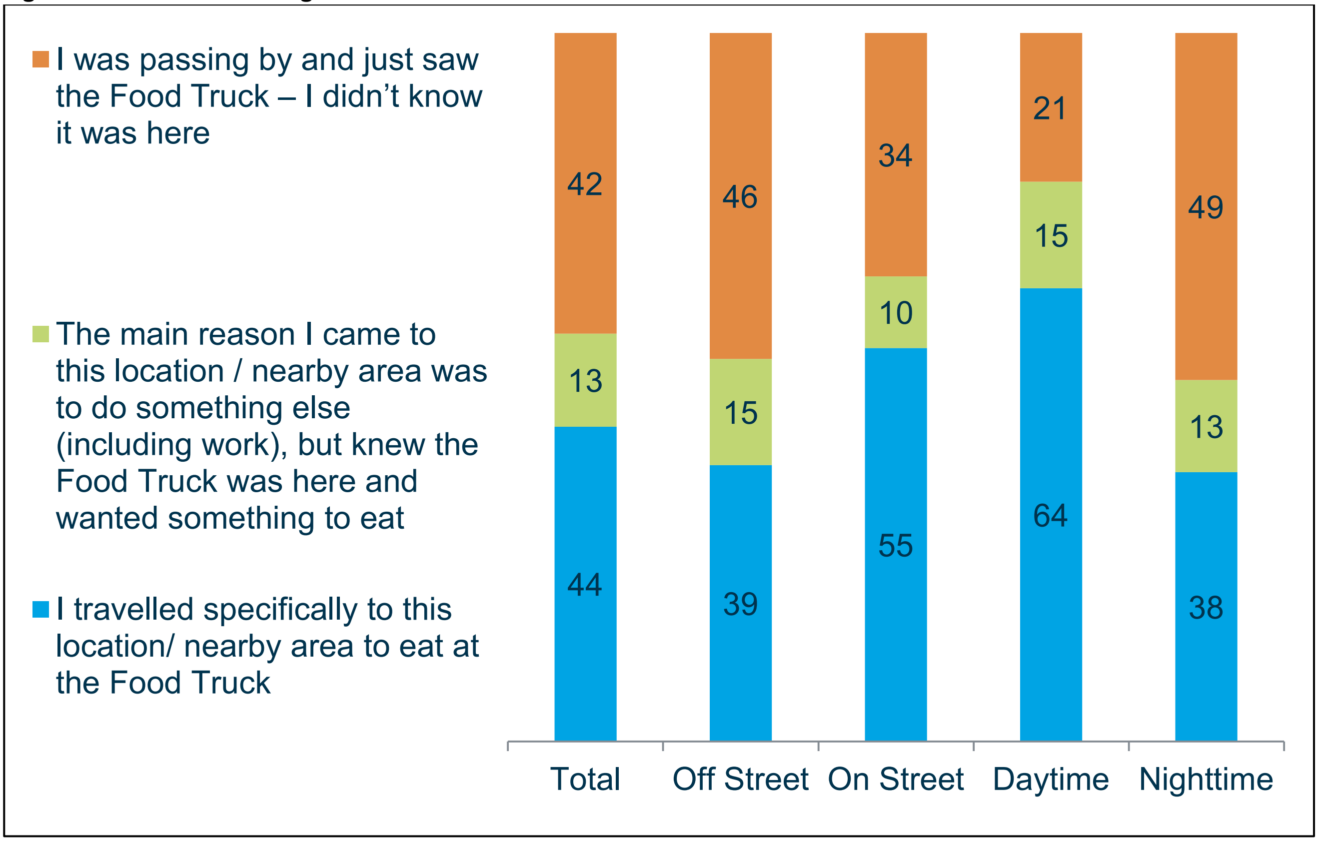
	Total (n=408) (%)
Age Range	
15-19	2
20-24	13
25-29	29
30-34	23
35-39	13
40-44	7
45-49	4
50-54	2
55+	4
Refused	2

4. Truck Visitation

4.1 Attitudes

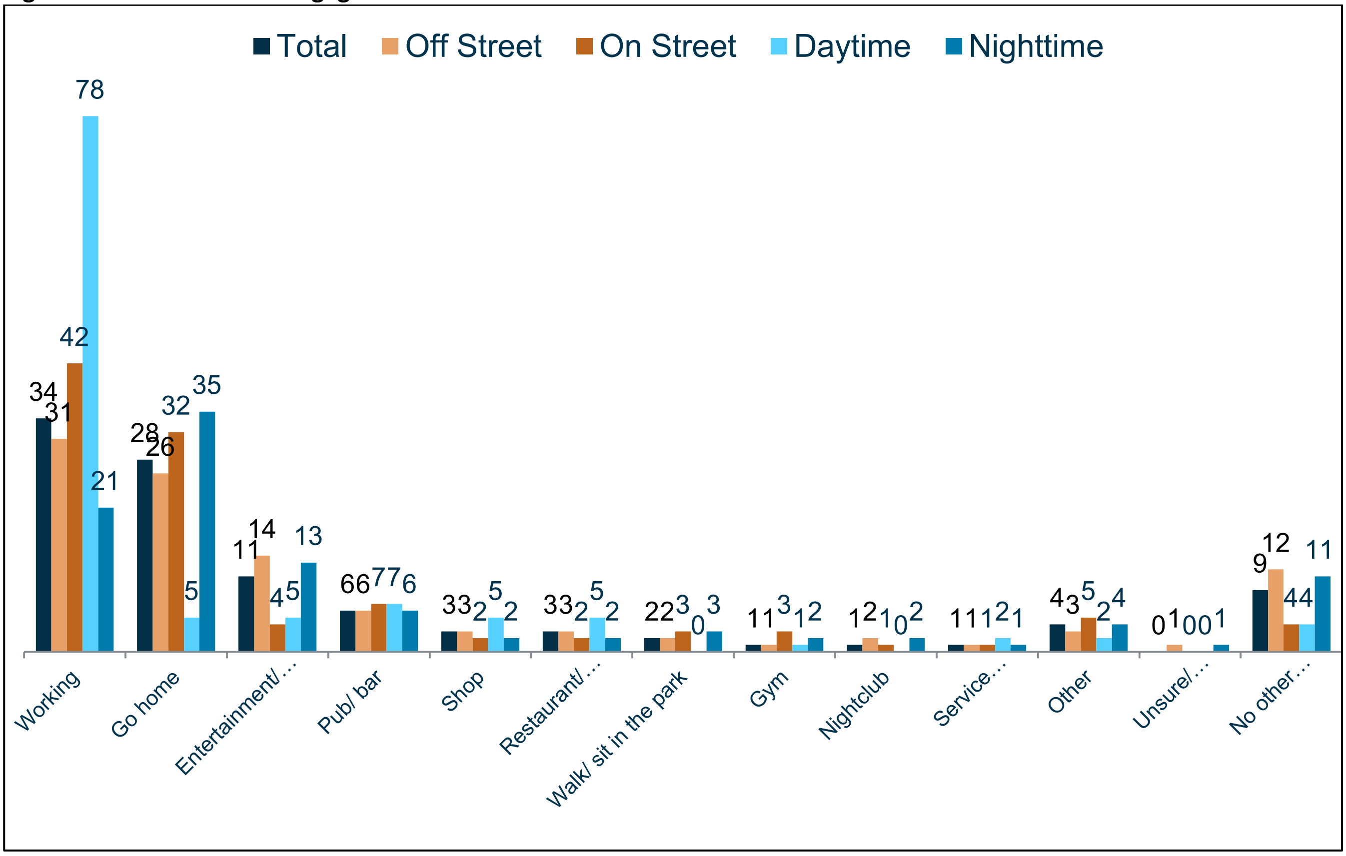
The most common reason for visiting the local area was specifically to eat at the Food Truck (44%). This was more common at On Street locations (55%) and during daytime trading hours (64%). 42% of respondents indicated that they were just passing by and saw the Food Truck; that they didn't know it was there. This was particularly common at nighttime (49%, Figure 1).

Figure 1: Reason for Visiting Local Area



When asked what other activities they had just done, or would do afterwards in the nearby area, the most common activity was working (34%), particularly during the day (78%). Only 9% indicated that they wouldn't do any other activities in the nearby area (Figure 2).

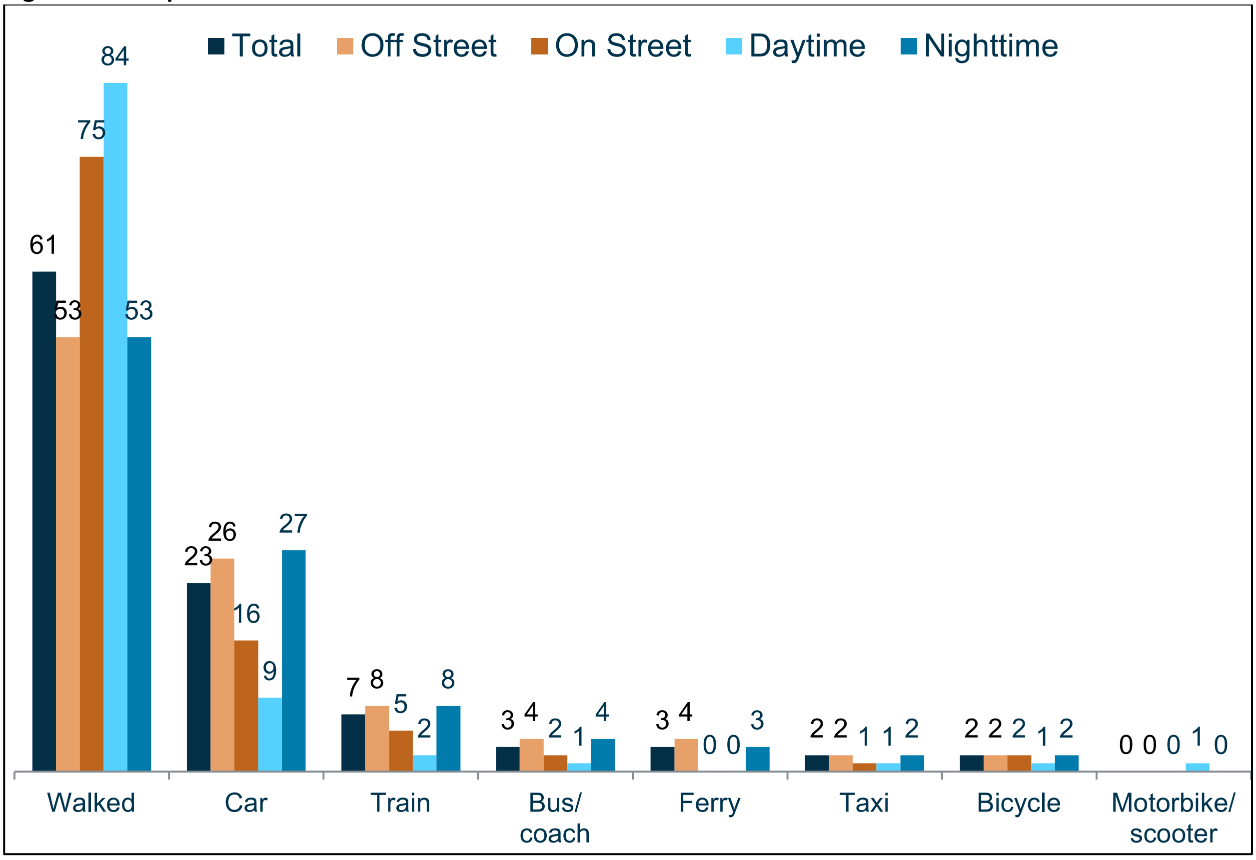
Figure 2: Other Activities Engaged in Local Area



4.2 Travel to Food Trucks

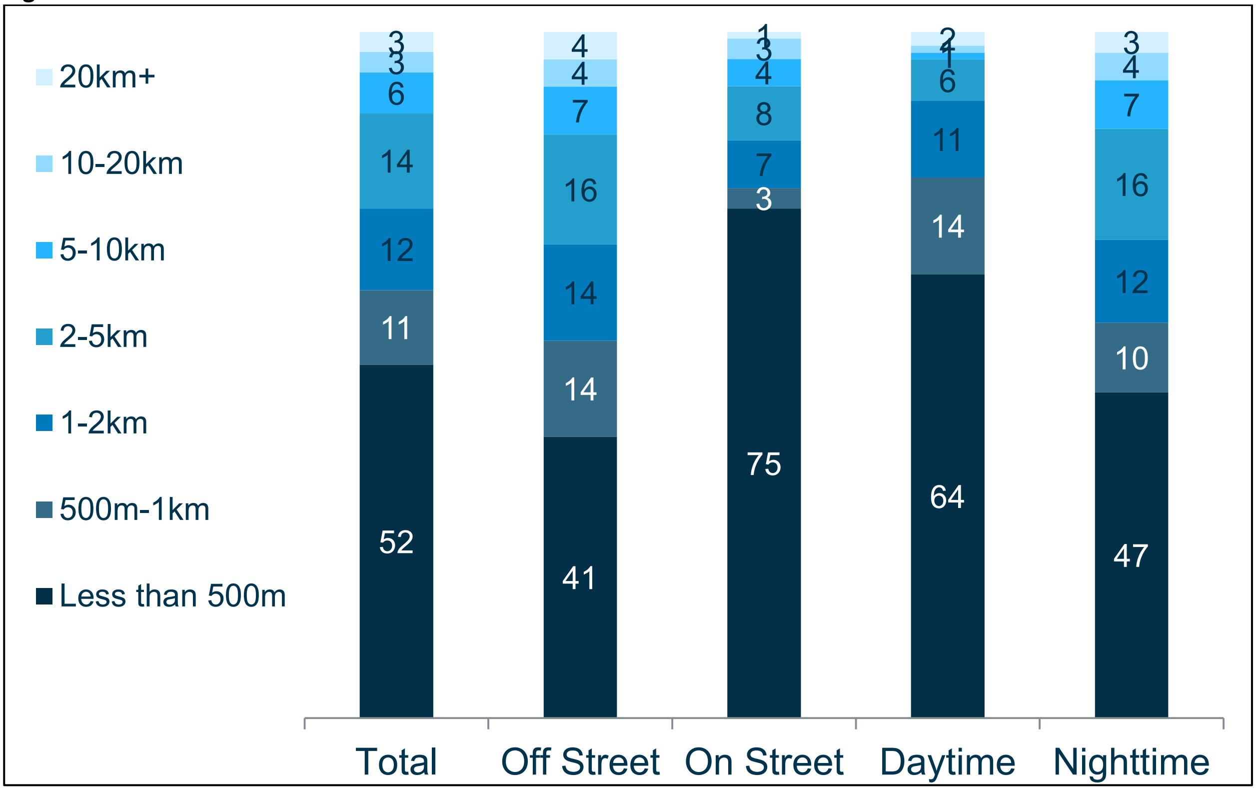
As shown in Figure 3, the most common form of transport used to get to Food Truck locations was walking (61%), particularly during the day (84%), and to On Street locations (75%). Almost one quarter used a car to get to the Food Truck location (23%).

Figure 3: Transport used to visit Food Trucks



More than half of respondents (52%) travelled less than 500 metres to visit the truck. This was most prevalent amongst On Street customers (75%). One quarter of all respondents (25%, Figure 4) travelled 2km or more to visit a Food Truck.

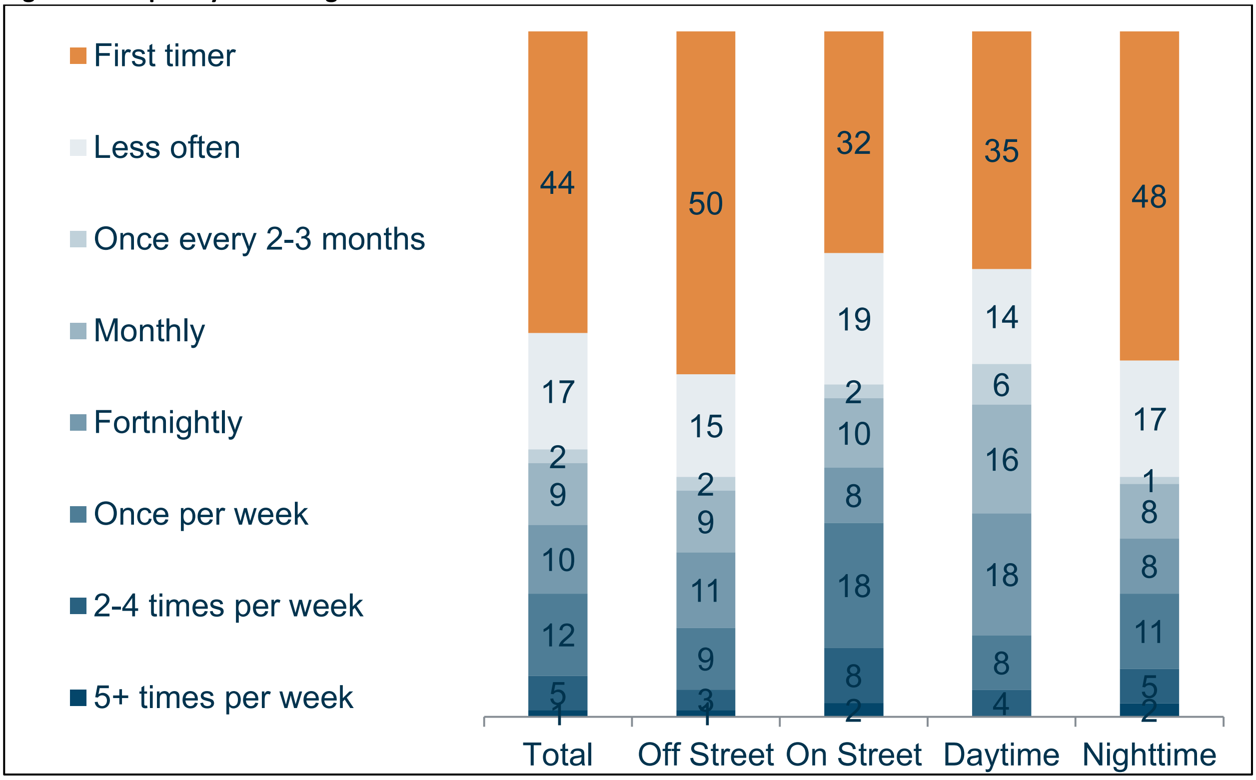
Figure 4: Distance Travelled to visit Food Trucks



4.3 Frequency of Food Truck Visitation

Encouragingly, almost 1 in 5 respondents (18%) indicated that they visited a Food Truck at least once a week. Almost half of all respondents (44%, Figure 5) were visiting a Food Truck for the first time.

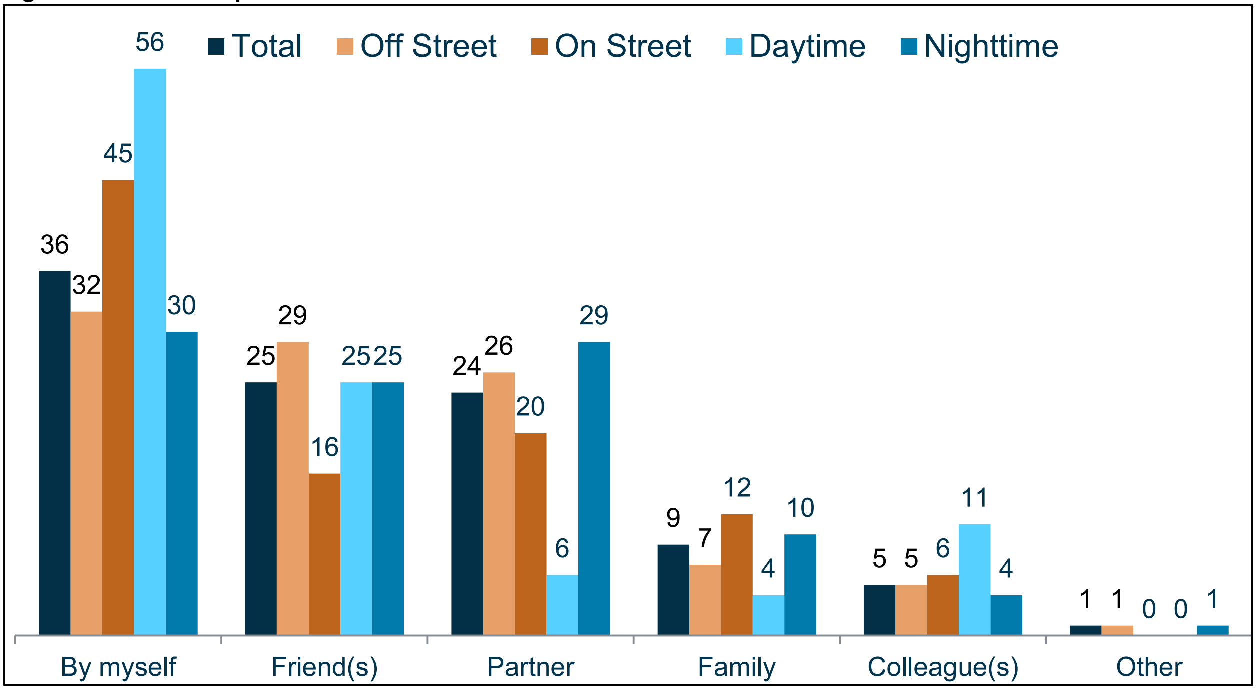
Figure 5: Frequency of Visiting Food Trucks



4.4 Visitor Companion

36% of respondents visited the Trucks by themselves. This was most common during daytime trading hours (56%). At night, people most commonly visited alone (30%), with their partner (29%) or with friend(s) (25%, Figure 6).

Figure 6: Visitor Companion

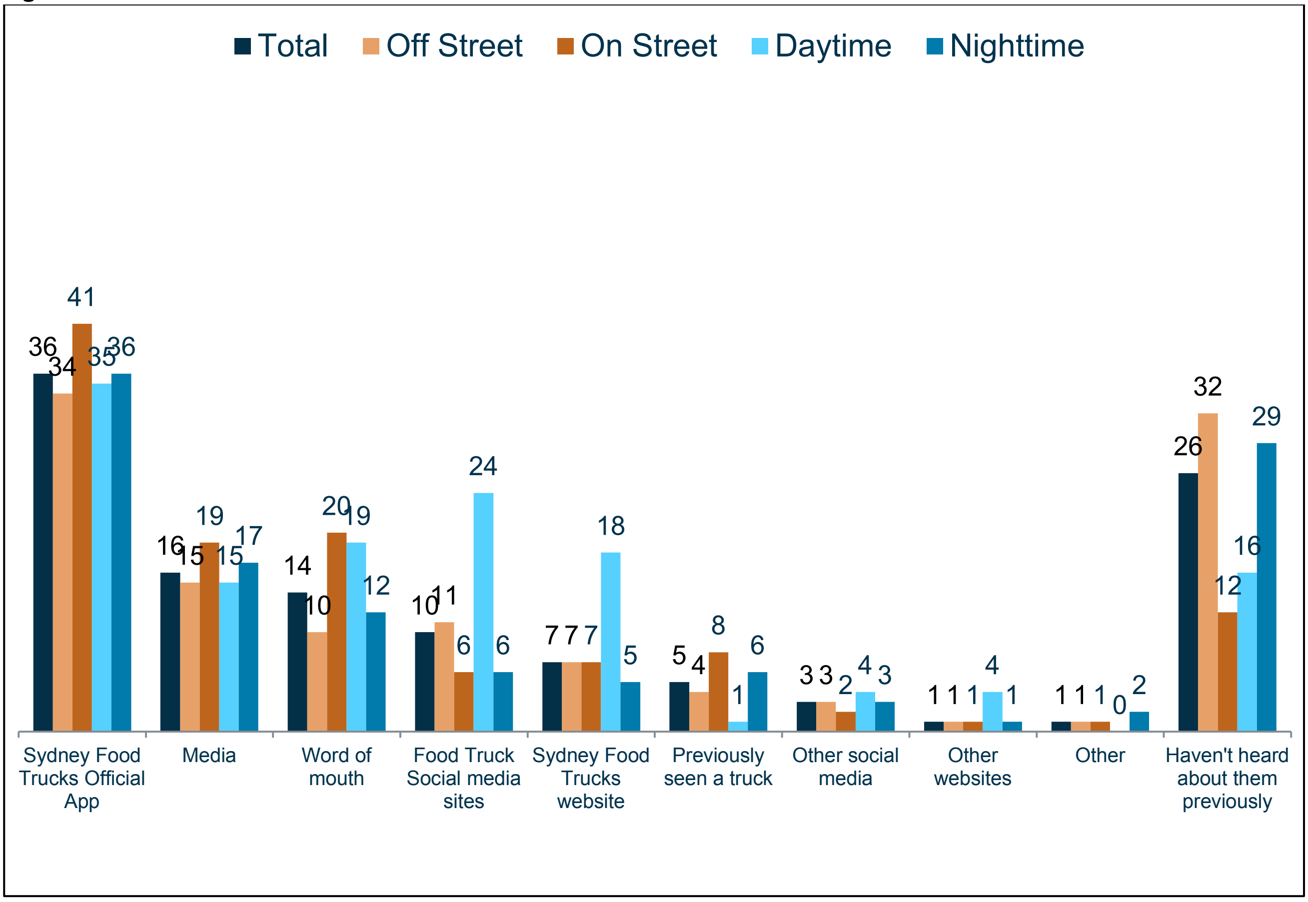


5. Information Sources

5.1 General Information Sources

Across all trading times and locations, the Sydney Food Trucks Official App was the most common information source (36%, Figure 7). Daytime visitors were the most likely to use Food Truck social media sites.

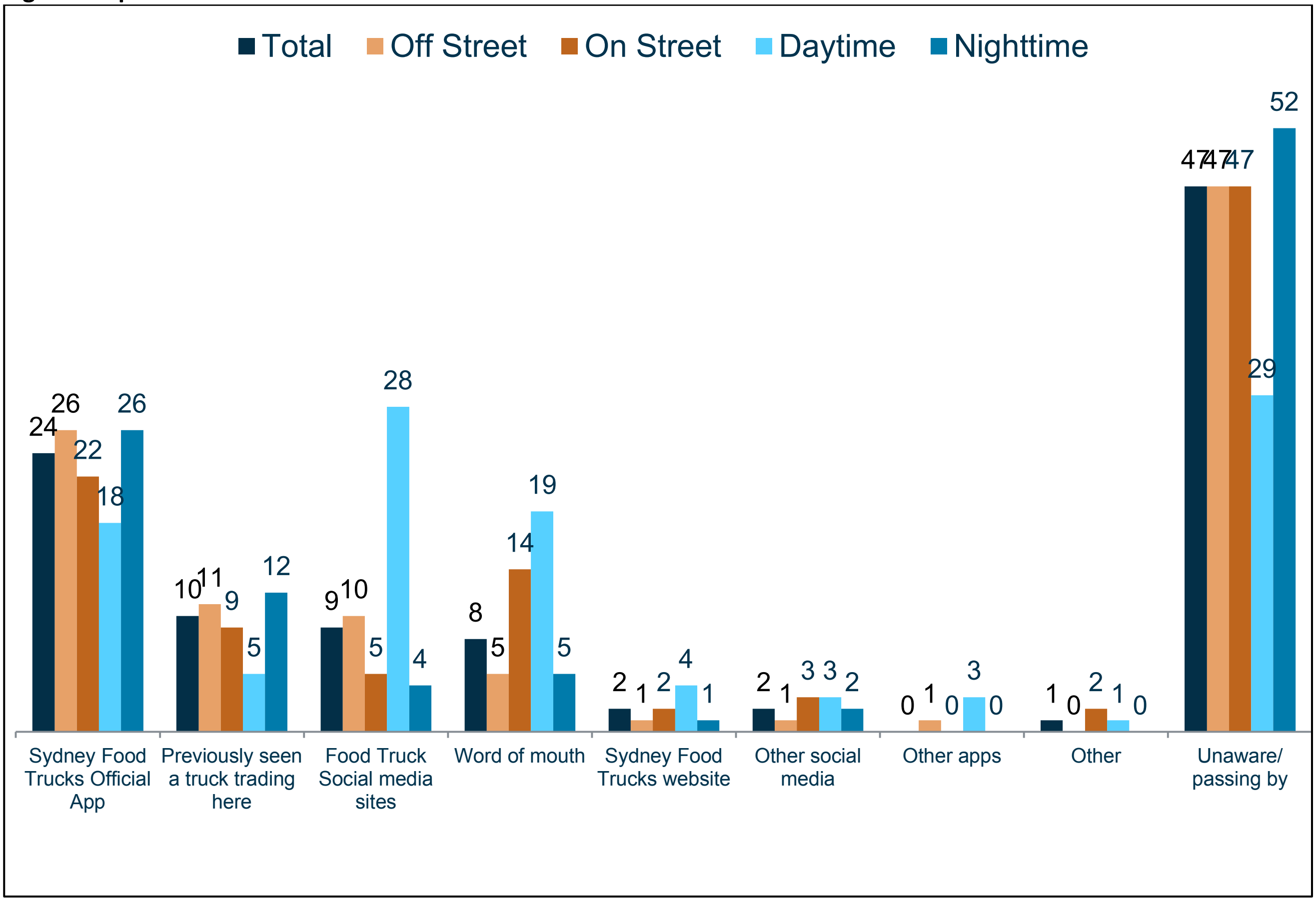
Figure 7: General Information Sources



5.2 Specific Food Truck Location Information Sources

When asked how they knew that the particular Food Truck would be at the location on that day, nearly one quarter of people indicated that they used the Sydney Food Trucks Official App to find the location of the Truck they visited (24%, Figure 8). Almost half (47%) were unaware that the Food Truck would be there.

Figure 8: Specific Food Truck Location Information Sources

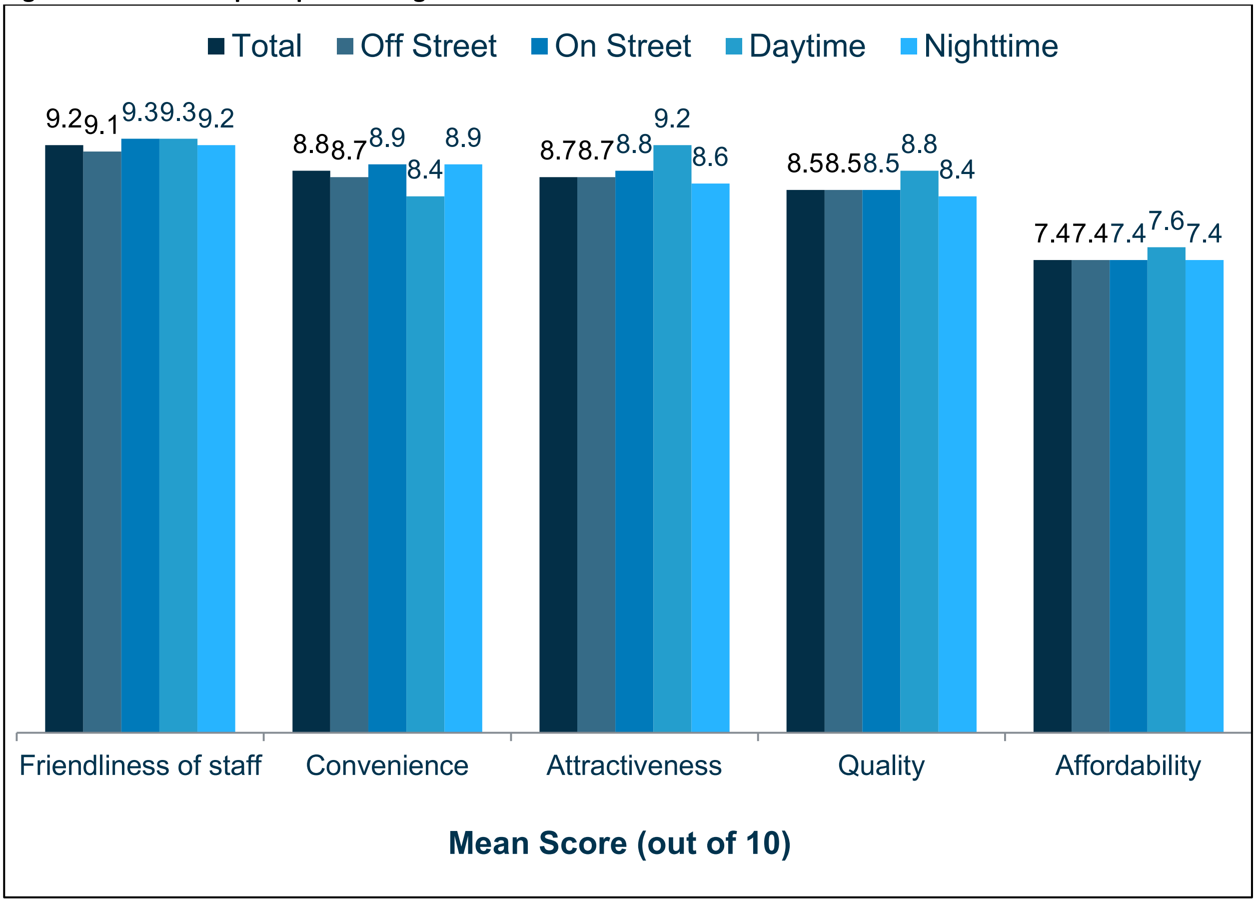


6. Perceptions and Motivators

6.1 Perceptions

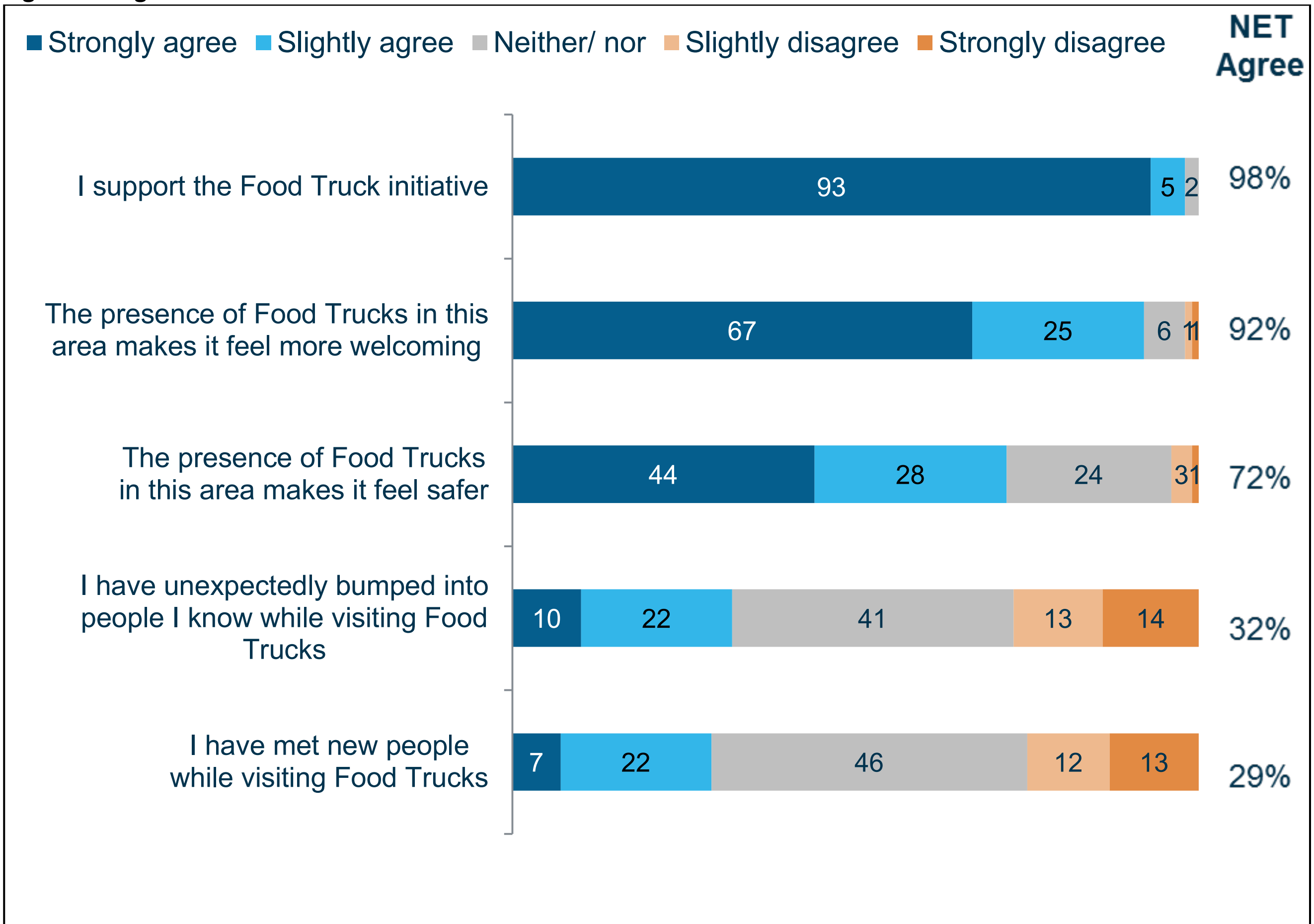
As shown in Figure 9, the Food Trucks received very high ratings on all prompted aspects, most notably the friendliness of the staff (mean score 9.2 out of 10).

Figure 9: Food Truck perception ratings



When asked their level of agreement with a range of statements regarding the Food Trucks, there was overwhelming support for the Food Truck initiative (98%). Around one-third of people had either bumped into people they knew (32%) or met new people at Food Trucks (29%, Figure 10).

Figure 10: Agreement with Statements



Respondents were asked for their suggestions to improve the Food Trucks. Encouragingly, 38% felt that the Food Trucks didn't need improving (Table 1), and the most common suggestions were to increase accessibility (through increasing the number of Trucks and the number of trading locations). The full breakdown of suggestions is as follows:

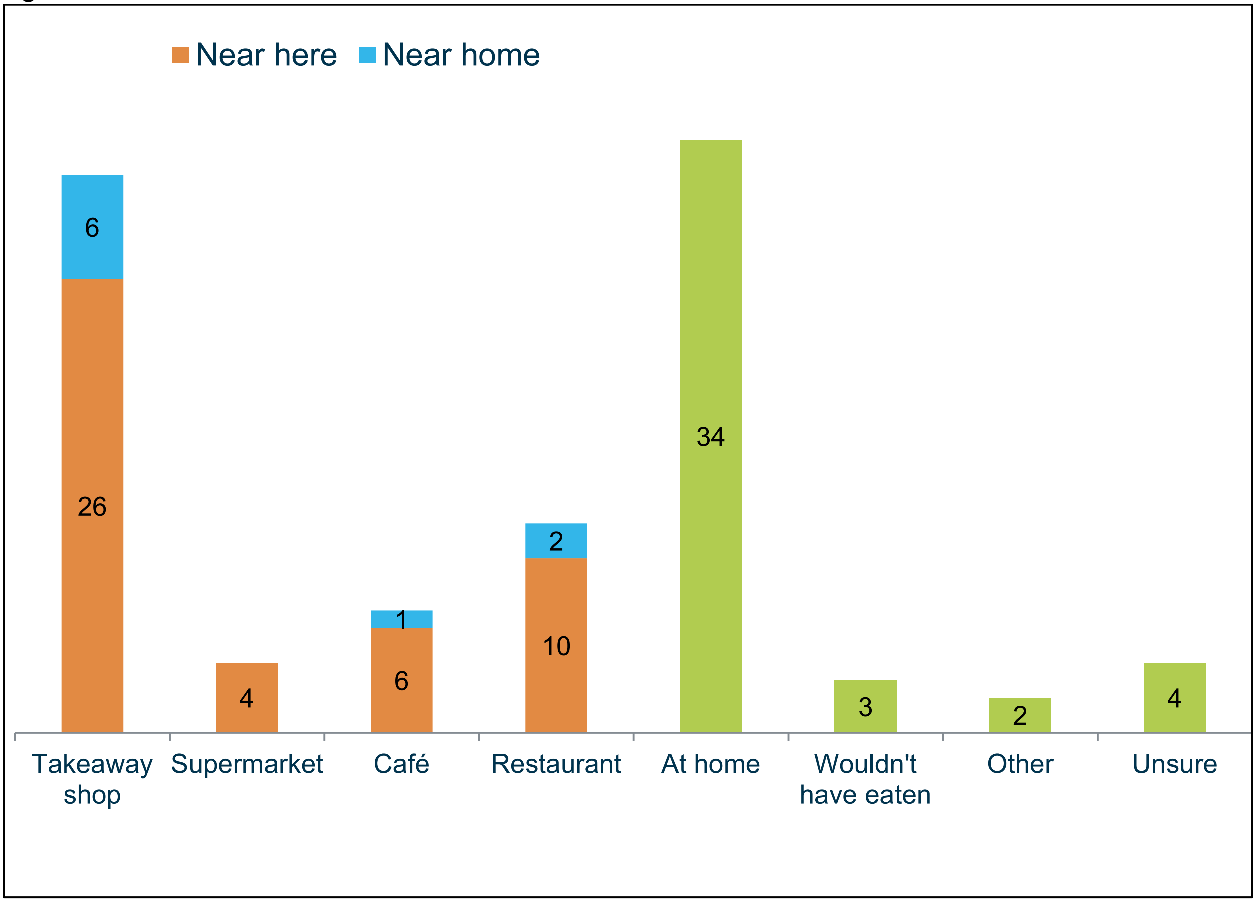
Table 1: Suggestions for Improvement

Suggestion	(N=408) %
No improvements needed	38
More Food Trucks in total	22
More accessible (i.e. more locations where the Food Trucks can be located)	14
More variety in the type of food served at the trucks	8
More information on where to find the trucks	7
More publicity	5
Seating for customers to eat at the Trucks	4
Decrease in food prices	3
More night time trading	3
More daytime trading	3
Better quality food	2
Other	4

6.2 Motivators

When asked where they would have eaten or purchased food from if the Food Truck had not been present, over a third of all respondents indicated that they would have eaten at home (34%, Figure 11).

Figure 11: Alternative Meal Source



The most common motivators for visiting a Truck were the convenience (33%), followed by the quality of the food (25%). Many respondents mentioned the novelty of the Trucks (23%) or wanting to try something new (19%, Table 2).

Table 2: Main Motivator for Visiting Food Trucks

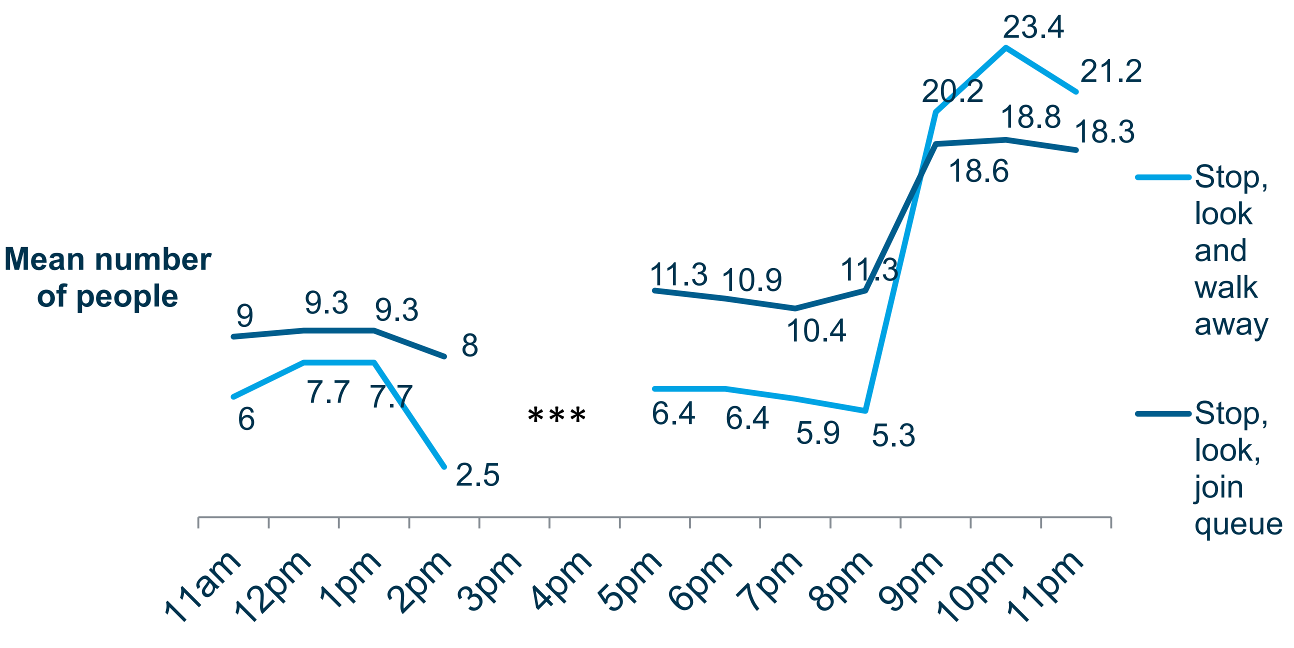
Motivator	N=(408) %
Convenience	33
Good quality food\healthier	25
Different/ novelty	23
Wanted to try something new\try it out	19
For the type of food – e.g. Mexican, pasta, vegetarian etc.	9
Hungry	4
Cost	2
Variety	2
Other	7
Don't know	1

7. Observational Data

7.1 Visitation

Observational data captured the number of visitors to the Trucks each hour, as well as the number of people who stopped and looked at the Truck but walked away without making a purchase. As shown in Figure 12, the peak time for visitors was 9pm-12am.

Figure 12: Observational Data - Visitation

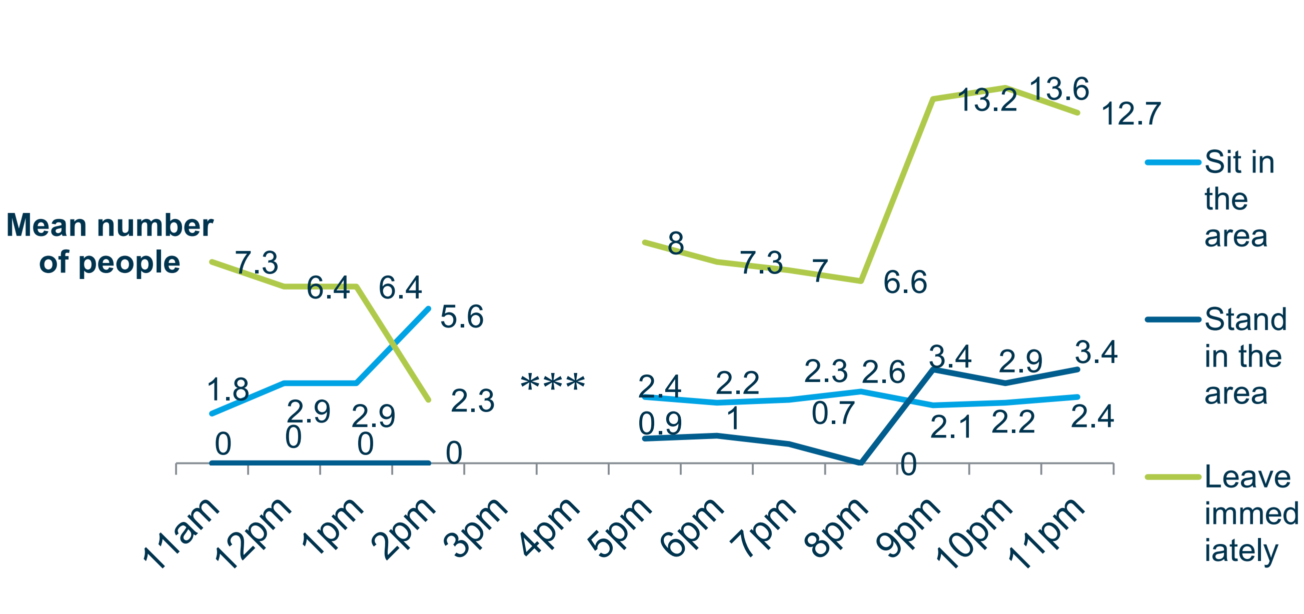


*** No interviewing conducted at 3pm or 4pm.

7.2 Eating Location

The observational data also captured the location in which visitors chose to eat their meals. Most Food Truck visitors left immediately with their food. Sitting in the area was more common than standing in the area, except for later at night (from 9pm onwards, Figure 13).

Figure 13: Observational Data - Eating Location

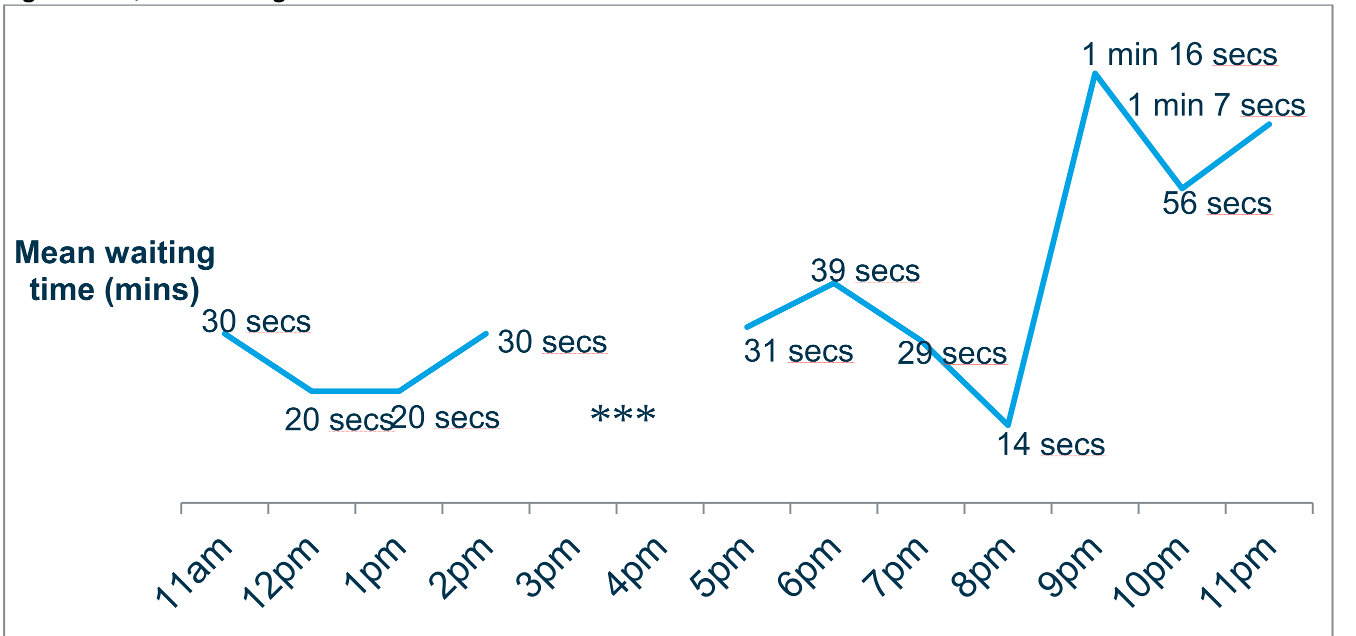


*** No interviewing conducted at 3pm or 4pm.

7.3 Queue Waiting Time

The time taken to get from the back of the queue to the front of the queue was taken at regular intervals, and an average queue waiting time was calculated for each hour. Overall, waiting times were very short, peaking at 1 minute 16 seconds at 9pm (Figure 14). This coincides with the increase in visitors during this timeframe.

Figure 14: Queue Waiting Time



*** No interviewing conducted at 3pm or 4pm.

8. Summary of Outcomes

Visitors to the Food Trucks tended to be young (peaking in the 25-29 age range at 29%), and there was little gender difference. More than half also lived in Inner Sydney (55%).

However, the Trucks were also attracting customers from outside their area of operation, with 25% of respondents indicating that they had travelled 2km or more to reach the Truck.

In addition, just under half of all respondents (44%) indicated that they had travelled specifically to the location/ area to eat at the Food Truck.

While 91% of respondents were participating in at least one other activity in the local area at some point that day, these were most likely to be working or being in transit (heading to or from home).

There also appears to be a dedicated following for the Trucks, with 18% indicating that they visit the Trucks at least once per week.

In terms of finding out about them, the Sydney Food Trucks Official App was the most popular source of information (36%), but more than one-quarter (26%) hadn't heard of Food Trucks previously, and almost half just 'happened upon' them where they were interviewed.

The most common motivators for visiting a Truck were the convenience (33%), followed by the quality of the food (25%). Many respondents also mentioned the novelty of the Trucks (23%) or wanting to try something new (19%).

It follows that the Food Trucks were viewed very positively, with all perception ratings (friendliness of staff, convenience, attractiveness, quality, affordability) scoring above 7 out of 10.

Customers were clearly impressed with the Trucks, with an overwhelming 98% agreeing that they supported the Food Truck initiative. The Trucks were also seen to make the area safer (72%) and more welcoming (92%).

When asked for suggestions for improvement, 38% thought that no improvements were needed. However, the most common suggestions were to increase accessibility (through increasing the number of Trucks and the number of trading locations).

While some would have eaten at nearby eateries, the Trucks were also generating new business, with the most popular alternative to eating from the Truck being to eat at home (34%).

Appendix A: Questionnaire

WOOLCOTT RESEARCH

Good morning/afternoon/evening. My name is ….. from Woolcott Research and we're conducting an important study on behalf of City of Sydney Council, talking to people in the community about Food Trucks. Would you be able to spare a few minutes now to answer a few questions?

1. What was the main mode of transport you used to get to this Food Truck location? *Single response*

1	Car	**5**	Light rail	**9**	Motorbike/scooter
2	Train	**6**	Taxi	**98**	Other (please specify)_______________
3	Bus/coach	**7**	Walked (whole journey)		
4	Ferry	**8**	Bicycle		

2. How far did you travel to get here today from your previous location?

1	Less than 500m	**3**	1-2km	**5**	5-10km	**7**	More than 20km
2	500m-1km	**4**	2-5km	**6**	10- 20km		

3. Which statement best reflects your visit to this area today? (READ OUT)

1 I travelled specifically to this location / nearby area to eat at the Food Truck
2 The main reason I came to this location / nearby area was to do something else (including work), but knew the Food Truck was here and wanted something to eat
3 I was passing by and just saw the Food Truck – I didn't know it was here
4 Other (please specify)____

4. Who are you here with today? *Multiple Response Possible*

1	By myself	**3**	Friend(s)	**5**	Colleague(s)
2	Partner	**4**	Family	**98**	Other (please specify)_______________

5. Which of the following have you just done, or will you do after this-in the nearby area? *Multi-response.* **(SHOW CARD)**

1	Shop (convenience or department store, supermarket, other retail etc.)	**6**	Entertainment/ cultural facility (e.g. cinema, art gallery, entertainment centre, theatre)
2	Restaurant/ Café	**7**	Service establishment: nail salon, massage parlour, hairdresser, etc.
3	Pub/ bar	**97**	Unsure/ don't know
4	Night club	**98**	Other (please specify)_________________
5	Working	**99**	No other activities

6. On average, how often have you visited any of the Food Trucks around the City of Sydney? (<u>SHOW PICTURES</u>).

1	5+ times per week	**4**	Fortnightly	**7**	Less often
2	2 – 4 times per week	**5**	Monthly	**8**	This is my first time to a Food Truck
3	Once per week	**6**	Once every 2 -3 months		

7. Have you ever heard about any of the Food Trucks around the City of Sydney area through the following channels? (SHOW CARD)

1	Sydney Food Trucks Official app	**6**	Other apps (e.g. Truckr)
2	Sydney Food Trucks Website	**7**	Other websites (e.g. Where's the Truck At)
3	Media – newspaper, magazine, radio, TV	**8**	Word of Mouth
4	Food Truck social media sites	**9**	Haven't heard about them previously
5	Other social media	**98**	Other (please specify)_________________

8. And how did you know this particular Food Truck would be at this location at this time today? DNRO.

1	Sydney Food Trucks Official app	**6**	Other apps (e.g. Truckr)
2	Sydney Food Trucks Website	**7**	Other websites (e.g. Where's the Truck At)
3	Food Truck operator Facebook post	**8**	Word of Mouth
4	Food Truck operator Twitter post	**9**	Previously seen a truck trading here
5	Other social media	**10**	Not aware/ passing by
		98	Other (please specify)_________________

9. If this Food Truck wasn't here today, where would you have eaten or purchased food from instead?

	Near here	*Near home*		
Takeaway shop	1	2	**At home**	9
Supermarket	3	4	**Wouldn't have eaten**	10
Café	5	6	**Other(specify)__________**	98
Restaurant	7	8	**Don't know**	99

10. And what is your main reason for visiting a Food Truck rather than another food outlet?

____

____

11. On a scale of 0 to 10, 0 being EXTREMELY POOR and 10 being EXTREMELY GOOD, how would you rate Food Trucks generally in terms of .....

												Don't know
a) Affordability	0	1	2	3	4	5	6	7	8	9	10	99
b) Quality	0	1	2	3	4	5	6	7	8	9	10	99
c) Convenience	0	1	2	3	4	5	6	7	8	9	10	99
d) Attractiveness	0	1	2	3	4	5	6	7	8	9	10	99
e) Friendliness of staff	0	1	2	3	4	5	6	7	8	9	10	99

12. I'm now going to read out a few statements that other people have said about Food Trucks. Can you please tell me whether you agree or disagree with each? And would that be strongly or slightly?

	Strongly disagree	*Slightly disagree*	*Neither/Nor*	*Slightly agree*	*Strongly agree*	*Don't know/NA*
a) The presence of Food Trucks in this area makes it feel safer	1	2	3	4	5	99
b) The presence of Food Trucks in this area makes it feel more welcoming	1	2	3	4	5	99
c) I have met new people while visiting Food Trucks	1	2	3	4	5	99
d) I have unexpectedly bumped into people I know while visiting Food Trucks	1	2	3	4	5	99
e) I support the Food Truck initiative	1	2	3	4	5	99

13. Do you have any suggestions to improve the Food Trucks? *DO NOT READ OUT.*

1	More Food Trucks in total	**6**	More night time trading
2	Seating for customers to eat at the Trucks	**7**	More variety in the type of food served at the trucks
3	More accessible (i.e. more locations where the Food Trucks can be located)	**8**	Better quality food
		9	More information on where to find the trucks
4	Decrease in food prices	**98**	Other (please specify)_______________
5	More daytime trading	**99**	No improvements needed

14. Age: (SHOW CARD)

1	15 - 19	**5**	35 - 39	**9**	55 - 59	**13**	75 - 79
2	20 - 24	**6**	40 - 44	**10**	60 - 64	**14**	80 - 84
3	25 - 29	**7**	45 - 49	**11**	65 - 69	**15**	85+
4	30 - 34	**8**	50 - 54	**12**	70 - 74	**99**	Refused

15. Gender: **1** Male **2** Female

16. What is your current postcode?

Postcode: __________ Overseas _________________________ (Please specify country)

My supervisor may need to check a small proportion of my work. Would you mind if I collect a few personal details?

Name:________________________________ Phone:____________________________

Record: Time: ____________________ Date:____/____/2013 Location:____________________

Interviewer:____________________

Appendix B: Observational Record Sheet

WOOLCOTT RESEARCH

Time	# who stop, look and walk away	# who stop, look and join queue	Time taken from end of queue to front of queue (Record every 10 minutes)			# who SIT in the vicinity to eat	# who STAND in the vicinity to eat	# who leave immediately with their food
Hour 1 ( )			00	10	20			
			30	40	50			
Hour 2 ( )			00	10	20			
			30	40	50			
Hour 3 ( )			00	10	20			
			30	40	50			
Hour 4 ( )			00	10	20			
			30	40	50			

Record: Date:___/___/2013 Location:________ Truck:________ Interviewer:________ Weather:________

EXPERIENCE | INNOVATION | INSPIRATION