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RESEARCH & ENGAGEMENT

2016 Food Truck Study

Prepared for: CITY OF SYDNEY

September 2016

Background and Objectives

In late 2011, consultations with the public revealed **a need for high quality food options late at night**. The City responded to this need, and **a one year trial of Food Trucks was established**, with the view to providing accessible, high quality, creative, affordable takeaway food options within the LGA.

This trial commenced in May 2012, and with the addition of a small number of new trucks, it was extended through to March 2014. The City then **sought feedback on the trail**, and Woolcott Research was commissioned to undertake **an evaluation in mid 2014 – involving customer feedback, patronage counts, the collation of economic data, and qualitative feedback from truck operators and other stakeholders**.

Several years have now passed since this initial work was undertaken, and a number of changes have taken place within that timeframe. As such, **the City had a need for a new evaluation to be undertaken**, with an emphasis on gaining **feedback from the food truck operators** and the Australian Food truck Association.

Research Design

This study involved the application of a semi-structured questionnaire to food truck operators and Australian Food Truck Association (AFTA) representatives.

- **A 'semi-structured' approach** was considered the most appropriate, as it includes some set quantitative measures, but also has a lot of flexibility - in that most questions were open-ended – allowing the interviewer to undertake the interview in the form of a more qualitative discussion.
- **The City first contacted** all potential participants (24 Food truck operators and 2 AFTA representatives) explaining the need for the study and encouraging participation.
- Woolcott staff then **called each potential participant** to either conduct the interview or establish an appointment time to undertake it at a later date.
- In total there were **n=19 participants** in the research (17 Food truck operators and 2 AFTA representatives).
- While there was only **one direct 'refusal'**, two operators were overseas, and others did not follow up on (multiple) appointments made.
- All interviews were conducted between **1 and 21 September** 2016.

Notes on the Interpretation of Results

- *The final sample size for this study (n=19) is small in outright terms, and would normally preclude the presentation of outcomes in terms of percentages (if it were of a larger potential population).*
- *However, one of the objectives of the study was to provide quantitative style outcomes for some measures, and despite the small number of participants involved, the sample size actually represents the majority of the population (73% of potential participants were included in the study) – and as such the outcomes can be seen to be reliable.*
- *As a result, the findings included throughout this presentation-style report generally include percentages (often with the actual base size also indicated for any individual response category in order to highlight how many operators each response category represents).*
    - *In some instances though (where the degree of variation in responses was too great and/or there were only a few responses to a given question), results have been indicated in a more descriptive manner.*
- *Even so, care should still be taken when interpreting some of the quantitative findings – as the small base sizes do result in a great deal of variability with outcomes (e.g. where a small number of respondents can equate to a large proportion of responses for a particular response code).*
    - *In such circumstances it would be best to treat the results as 'indicative' rather than 'precise'.*
- *Selected verbatim comments have also been included in some instances. These are not all of the comments / responses received for a given question. They are included to give a flavour of the type of responses received.*

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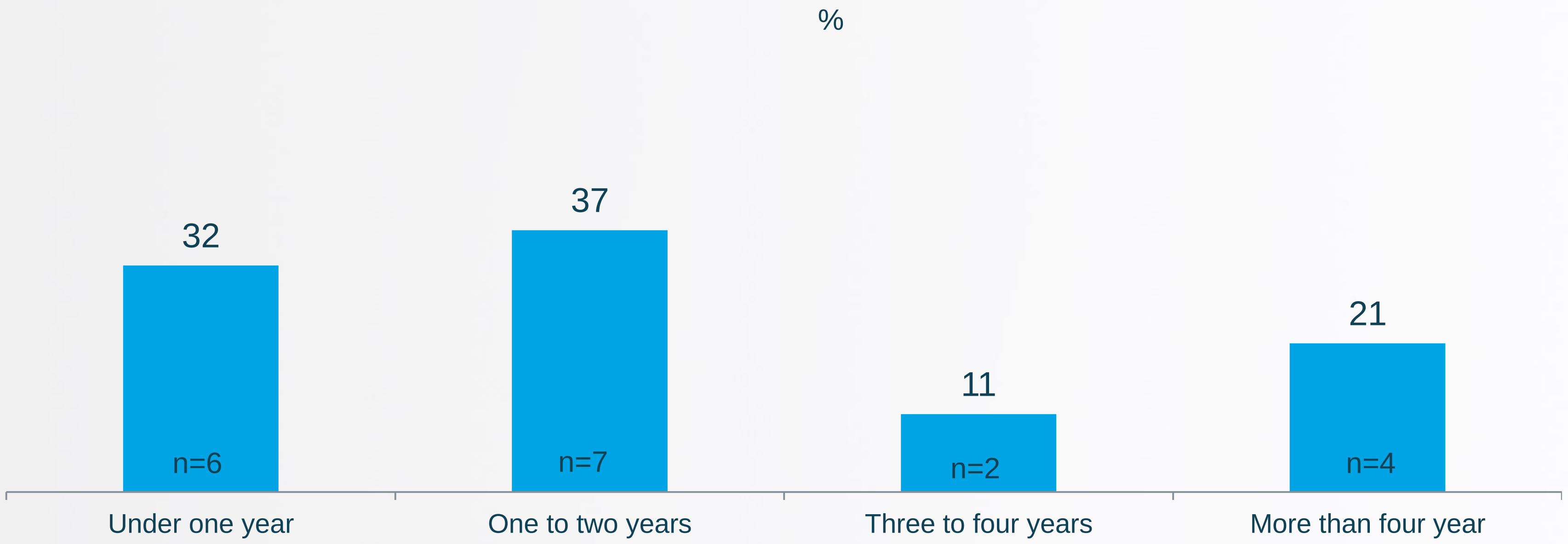
Research Findings: **Profile of Participants**

LENGTH OF TIME IN OPERATION

Participants in the research had varying degrees of experience in the industry

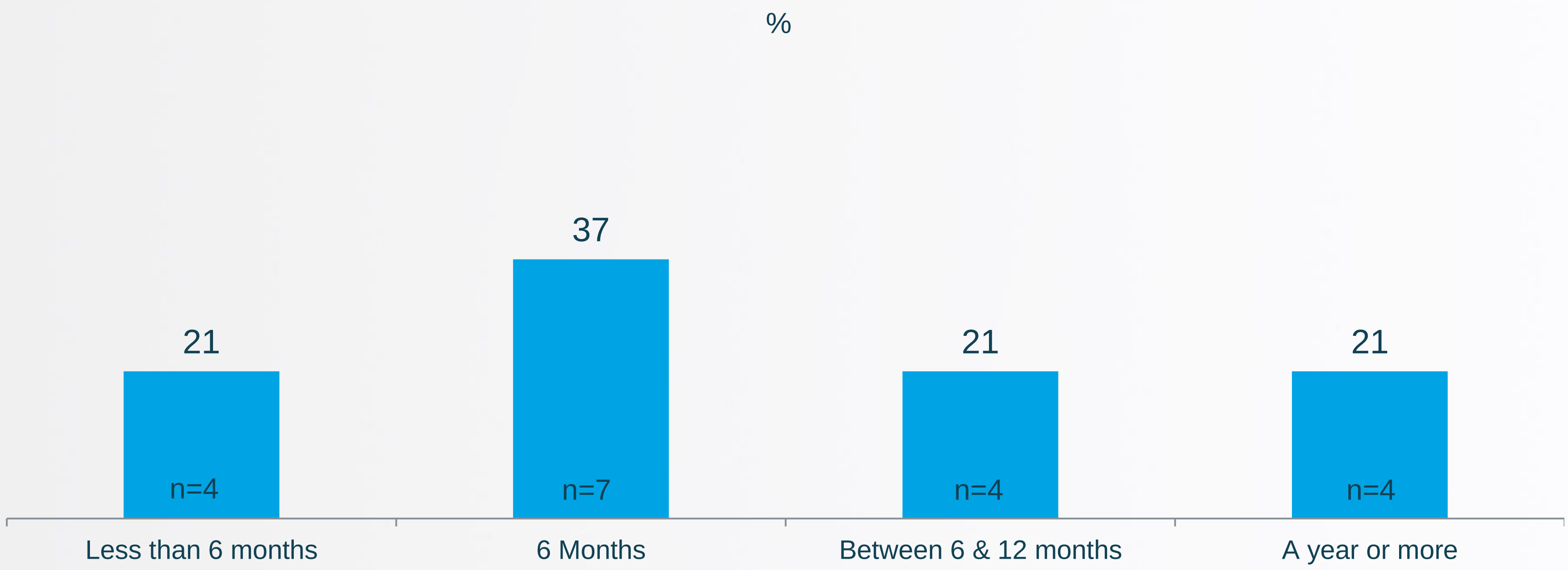


1. Firstly, can you please let me know how long you have been operating the food truck that trades within the City of Sydney LGA.

Base: All participants (n=19)

TIME TAKEN TO SET UP THE FOOD TRUCK

The bulk of all food trucks were said to take 6 months or more to set up

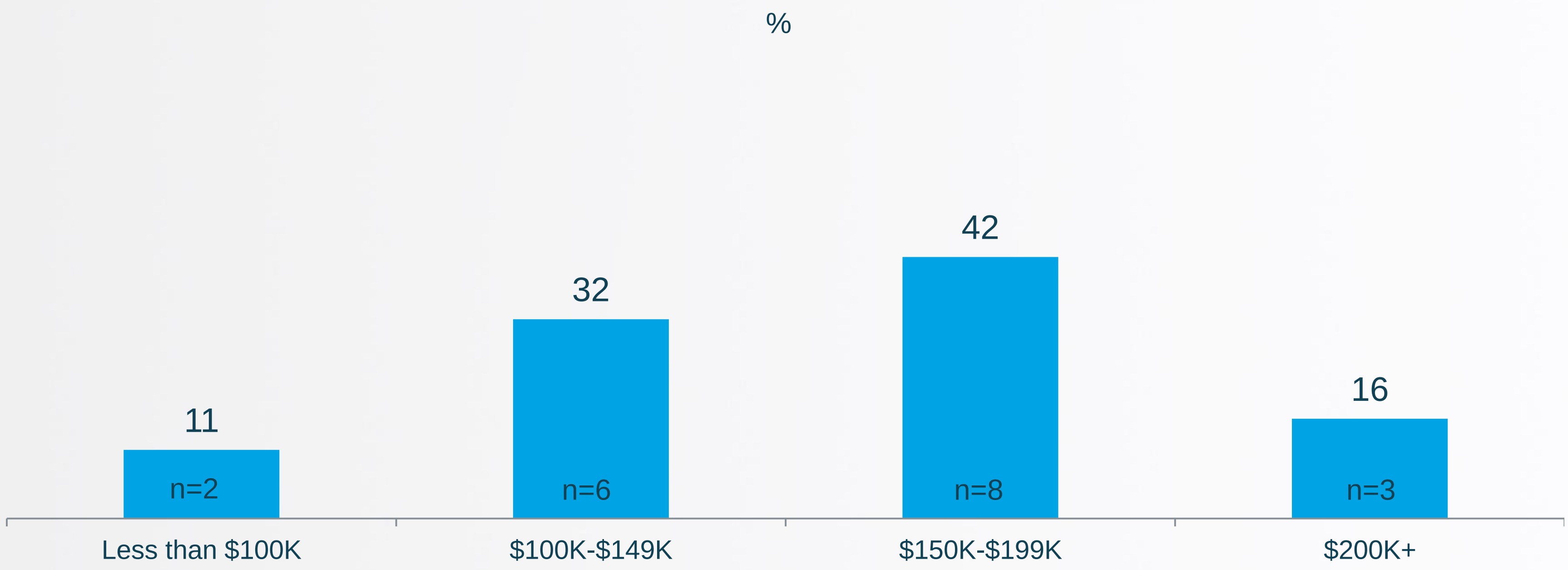


2. And approximately how long did it take you to set up the truck before you were able to trade? (i.e. from conception or initial approval (including approval for participation in the original trial or from the Design Panel) to the formal issuing of your mobile food vending permit).

Base: All participants (n=19)

COST TO SET UP THE FOOD TRUCK

Set-up costs ranged from $40,000 to $300,000 – with the average being $141,000



9. Can you please tell me the total set-up cost for your food truck (including your permit cost)?

Base: All participants (n=19)

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ANNUAL TURNOVER FOR THE FOOD TRUCK

Annual turnover figures ranged from $72,000 to $1,000,000 – with the average being $299,000. Two participants were 'unsure' of their annual turnover amount.

The average was $255K excluding the $1M figure.
$600K was the next highest amount.

%

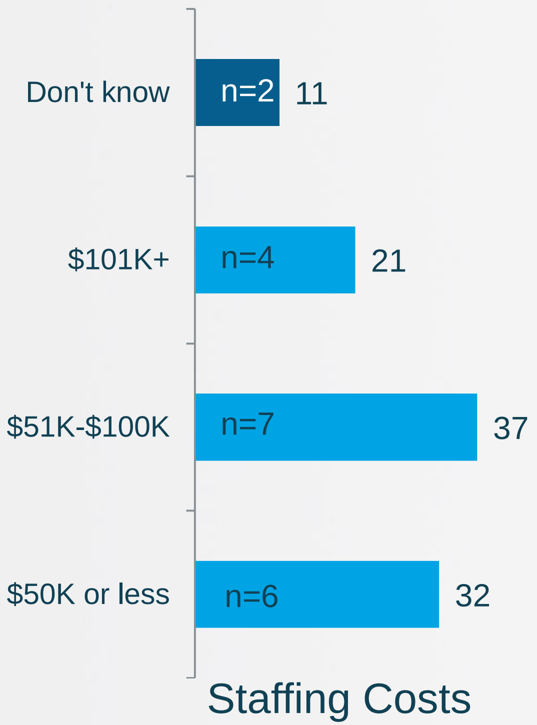
10. And what would be the annual turnover figure for that truck?

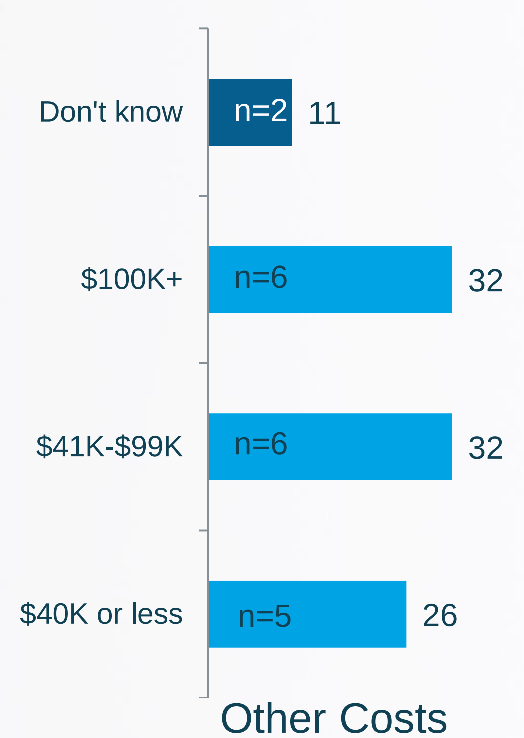
Base: All participants (n=19)

ANNUAL COSTS FOR THE FOOD TRUCK

Staffing costs ranged from $30,000 to $155,000 – with the average being $83,000.

Other costs ranged from $10,000 to $350,000 – with the average being $82,000.



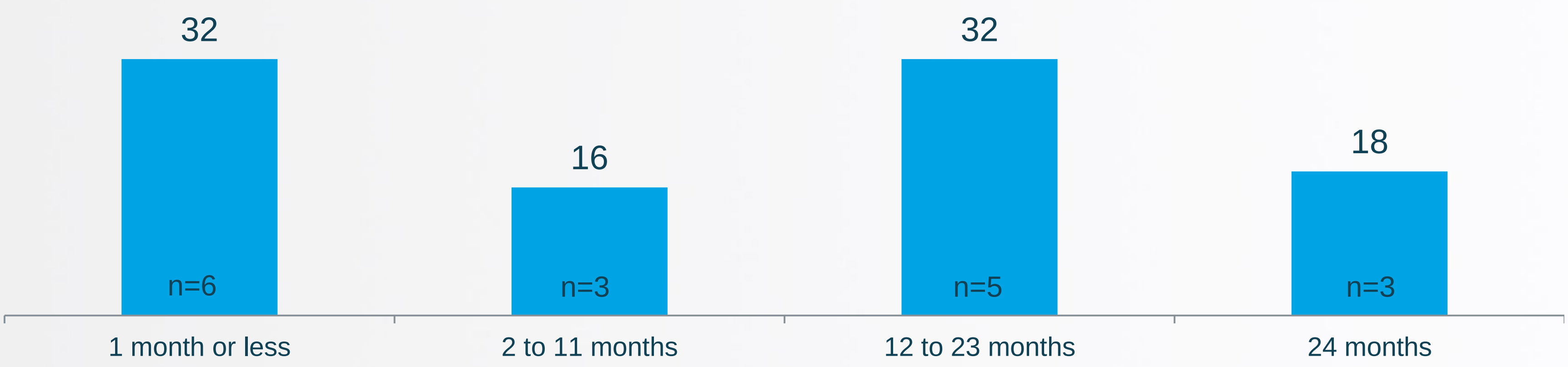


11. Now what about operating costs? What would be the annual staffing cost associated with that truck?
12. And what about all other costs? What would be the annual figure for other costs (everything but staffing costs)?

Base: All participants (n=19)

LENGTH OF TIME TO PRODUCE A PROFIT

Four participants insisted that they made a profit immediately (i.e. at 0 months) and a further two indicated that they made a profit during the first month of operation. The overall average time was 9 months. However, excluding those indicating a month or less the average was 13 months.



13. Approximately how long (after you started operating) did it take for you to break even (in months)?

Base: All participants (n=19)

STAFFING NUMBERS

Full-time Staff	(n=19) %
One	32
Two	47
Three	16
Four	5

Part-time Staff	(n=19) %
None	11
One	16
Two	11
Three	21
Four	26
Five	11
Ten	5

The average was for 2 full-time staff.

The average was for 3 part-time staff.

15. How many staff do you employ on a full-time basis (specifically for the food truck in question)? [NOTE: figure should include owners/operators if they work full-time on the truck]
16. And what about part-time staff (specifically for the food truck in question)? [NOTE: figure should include owners/operators if they work part-time on the truck]

Base: All participants (n=19)

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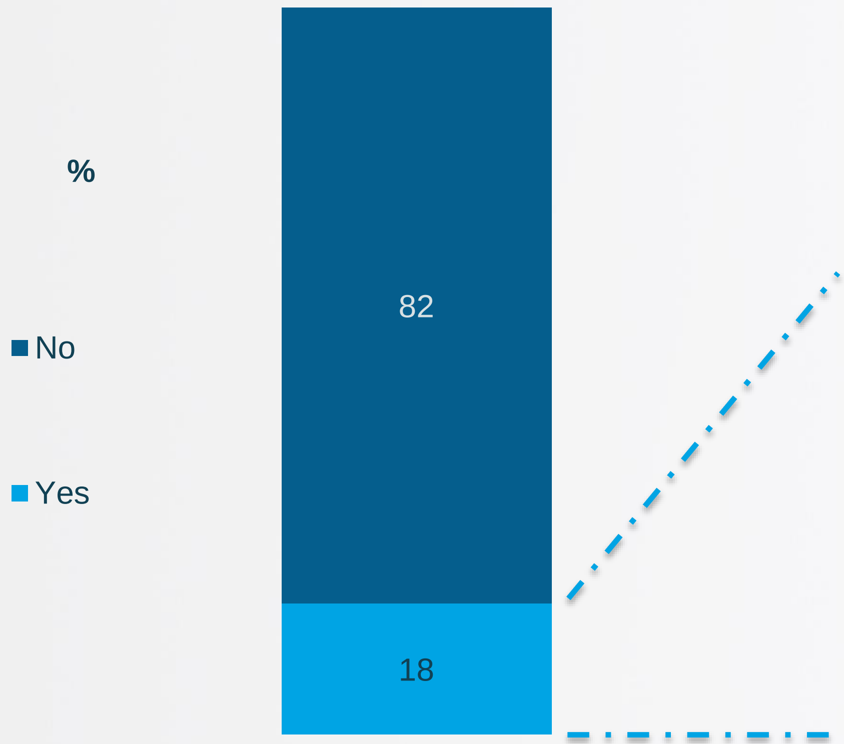
OWNERSHIP OF A BRICKS & MORTAR BUSINESS

A relatively small proportion of participants currently owned/operated a bricks & mortar business



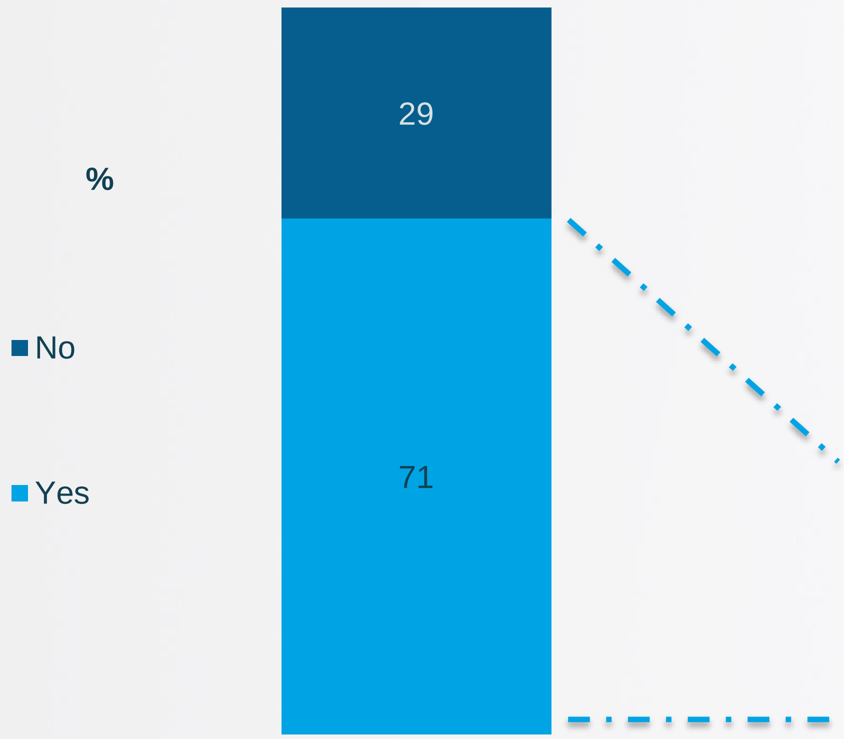
	(n=3) %
Business type	
Restaurant	33
Oyster farm	33
Shop	33
Food business	33

	(n=3) %
Location within CoS LGA	
Yes	33
No	67

17. Do you also own/manage a brinks and mortar business?
18. What type of business is it?
19. Is it located in the City of Sydney LGA?

Base: All participants (n=19)

DESIRE FOR BRICKS & MORTAR OWNERSHIP



Amongst those that didn’t have one, there was a high level of interest in opening a bricks & mortar business – though not all had firm plans to do so.

	(n=10) %
To be located within CoS LGA	
Yes	50
No	50

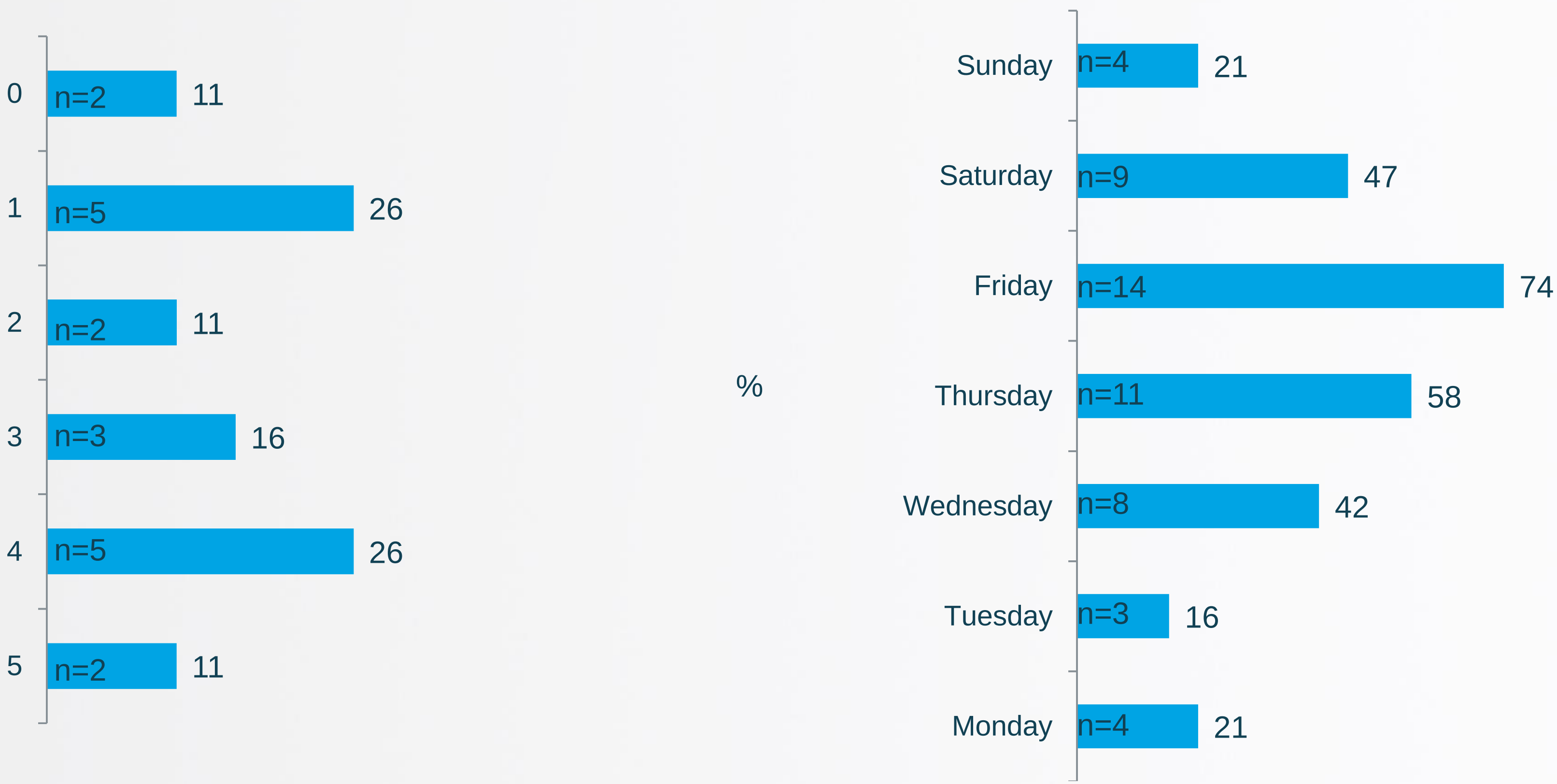
20. Do you plan to open a bricks and mortar business in the future?
21. Will it be located in the City of Sydney LGA?

Base: Participants who did not currently have a bricks & mortar bsuiness (n=16)

DAYS OF OPERATION

Numbers of Days per Week

Actual Days of the Week



22. How many days per week do you generally trade within the City of Sydney area?
23. Which days of the week do they generally trade within the City of Sydney area?

Base: All participants (n=19)

HOURS OF OPERATION

Hours of operations tended to vary considerably, and for many were dependant on the hours of the festivals and events that they were reliant on

- Some did lunch (e.g. 10am-2/3pm) and evening shifts (e.g. 5pm-9pm) when working at on-street locations in order to catch the largest crowds
- They were more likely to do longer shifts for events/festivals (e.g. noon-midnight)

It follows that the number of hours typically traded also varied considerably

- A three or four hour shift was not unusual if doing only lunch or dinner
- Covering both lunch and dinner may involve working up to 8 hours
- Event and festival hours could be longer (e.g. 12 hour shift)

Time spent at one location also varied

- Some indicated that they were sometimes constrained by parking limitation (e.g. 2 hour limit)
- If there were no parking limitations they would tend to trade at the one location for the duration of their shift

25. What hours of the day do you generally trade?
26. Why do you prefer to trade during those hours?
27. On average, how many hours a day do you trade?
28. And how long would you normally spend at a single location?

Base: All participants (n=19)

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Research Findings: **Permits**

PERMIT TYPE HELD

The large majority of participants held a street permit

3. Can you please confirm the permit type that you operate with when working in the City of Sydney area. Is it… READ OUT

Base: All participants (n=19)

BARRIERS TO TAKING UP A PREMIUM PERMIT

Reason	(n=15) %
Premium does not offer enough value	80
Premium locations are not great \ have to be shared	40
It was cheaper to have the general permit	33
Events \ on-street \ private property are the bulk of our business	33
Initially did not meet criteria for Premium Type I	7

“We were premium for the first 2 years and after that the traffic at premium sites definitely dropped off a lot”

“We were all ready to go with the top permit then we started speaking to other vendors. We didn't have that much money at the time and realised it wasn't worth it”

“There are very few places to go. The price should be relevant to the sites that are available and the number of trucks allowed”

“It's not necessarily the cost but the quality of the locations”

“The good areas are always booked out which means you only end up getting in a couple times a year, it's not worth it”

“I wouldn’t pay more than the current price for the on street permit”

“Maybe if they charged half the current price”

4. Why did you choose that permit type rather than Premium 1 or 2? What would be a more feasible permit price for your business?

Base: Participants with a street permit (n=15)

BENEFITS OF A PREMIUM 1 PERMIT

Despite asking for positive aspects, most of the feedback was negative:

“Most of the on-street sites no one really uses”

“The available time at most sites isn't right or they’re just not busy enough”

“It would be nice to have more beneficial sites at the price we pay”

“Don't think it is beneficial - because we can already go to off street locations, I don't feel that it is worth the money”

There were, however, benefits seen with specific sites:

“Customs House is good and a few other places”

“Circular Quay is the only site that we see any real value from”

6. How beneficial do you feel that the Premium Type 1 permit is to you? PROBE FULLY. What benefit do you get from this permit type? What else?

Base: Participants with Premium 1 permits (n=3)

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Research Findings: **Locations**

BENEFITS OF OFF-STREET LOCATIONS

BENEFIT	(n=19) %
The booking system is good \ ensures parking space	58
We don't see any \ mainly trade at festivals or events	26
Helps to raise awareness of the truck	21
Locations are generally high traffic	21
Easy to access the off-street locations	16
The time-restrictions on locations are a negative	5
There should be a centralised location for food trucks	5

"You don't have to fight for a parking spot, it's booked in the system and you can almost guarantee to your customers that you are going to be there"

"Parking times are not restricted. We need 25 mins to set up a truck and to pack up, if you only get a 2 hour spot then you only get 1 hr and 10 mins to trade."

"It would make parking easier for a caravan set-up"

"Definitely good in growing awareness of your brand. I would recommend new trucks to go to off-street locations just to get themselves seen, known and trialled".

"I don't see any added benefits of trading there, but we don't really do street trading - we mainly operate at festivals"

7. Generally speaking, what do you see as the main benefits of the off-street locations? PROBE FULLY. Are they the best locations to trade at? Why/why not?

Base: All participants (n=19)

ISSUES WITH OFF-STREET LOCATIONS

	(n=19) %
NEGATIVES	
Lack of foot traffic	37
Lack of exposure at some sites e.g. Hyde Park	26
Trading times are not optimal	21
Events are more consistent	16
Too expensive	16
Not enough locations	11
Too many restrictions	11
Lack of accessibility	11
Lack of parking	5
Vandalism of truck at Sydney Park	5
Bookings get cancelled	5
Unable to set up seating	5
Unable to have multiple trucks at one location	5
None / don't know	11

"The time restrictions with some locations are bad. Customs House for example only allows trade after 9pm which is crazy"

"Some locations are inaccessible. They should put in ramps to assist with access"

"There is only 1 lunch spot in the whole city to share between 25 trucks"

"You have to be on your computer at a specific time to pick options that fit your schedule, which is very limiting and frustrating".

"90% of locations don't have much foot traffic"

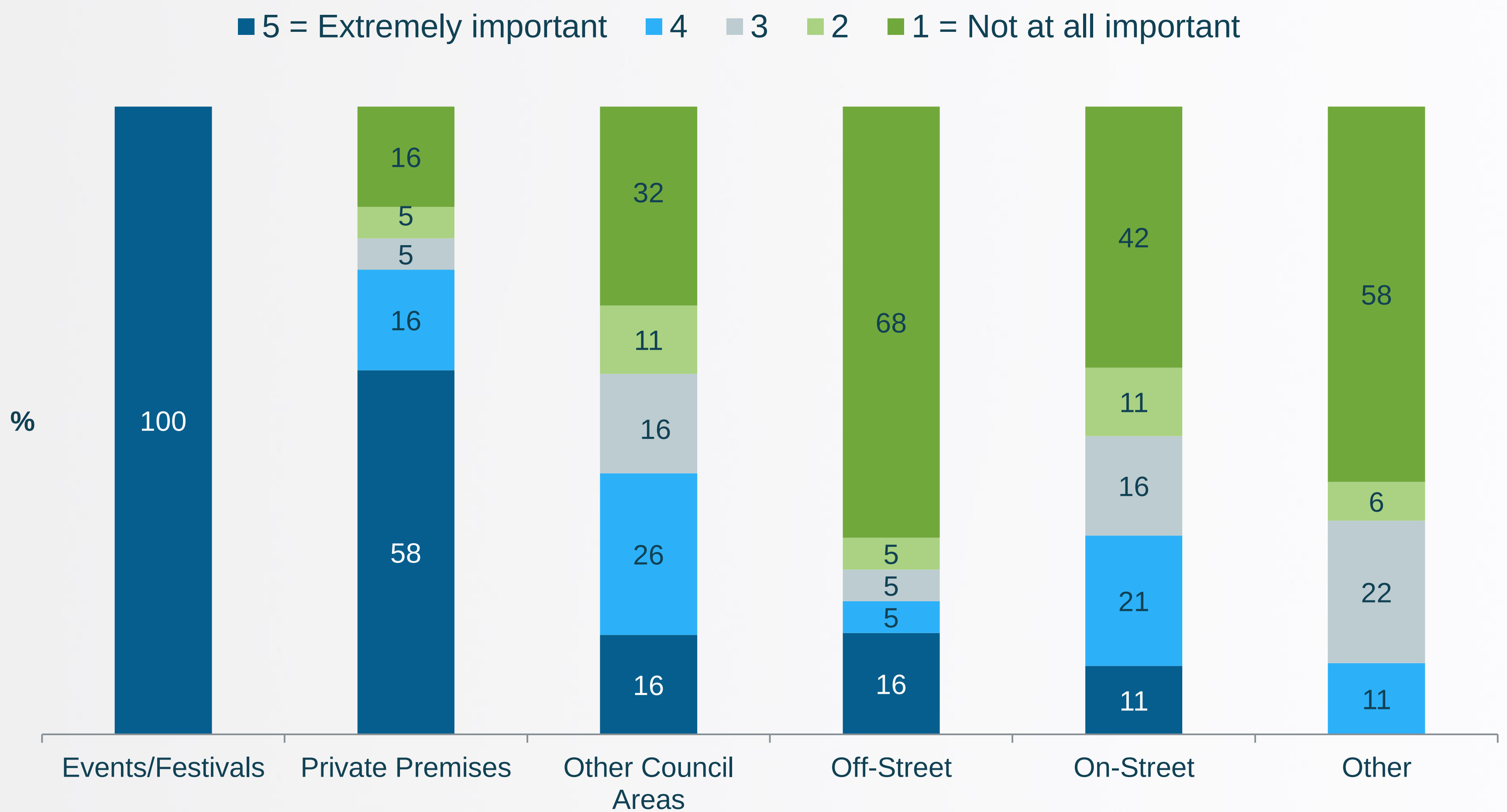
"There's not many of them, definitely not enough to justify the permit price"

"There is still the on street competition and fixed locations premises"

8. Are there any down-sides to the off-street locations? PROBE FULLY. What else?

Base: All participants (n=19)

PERCEIVED IMPORTANCE OF LOCATION TYPES

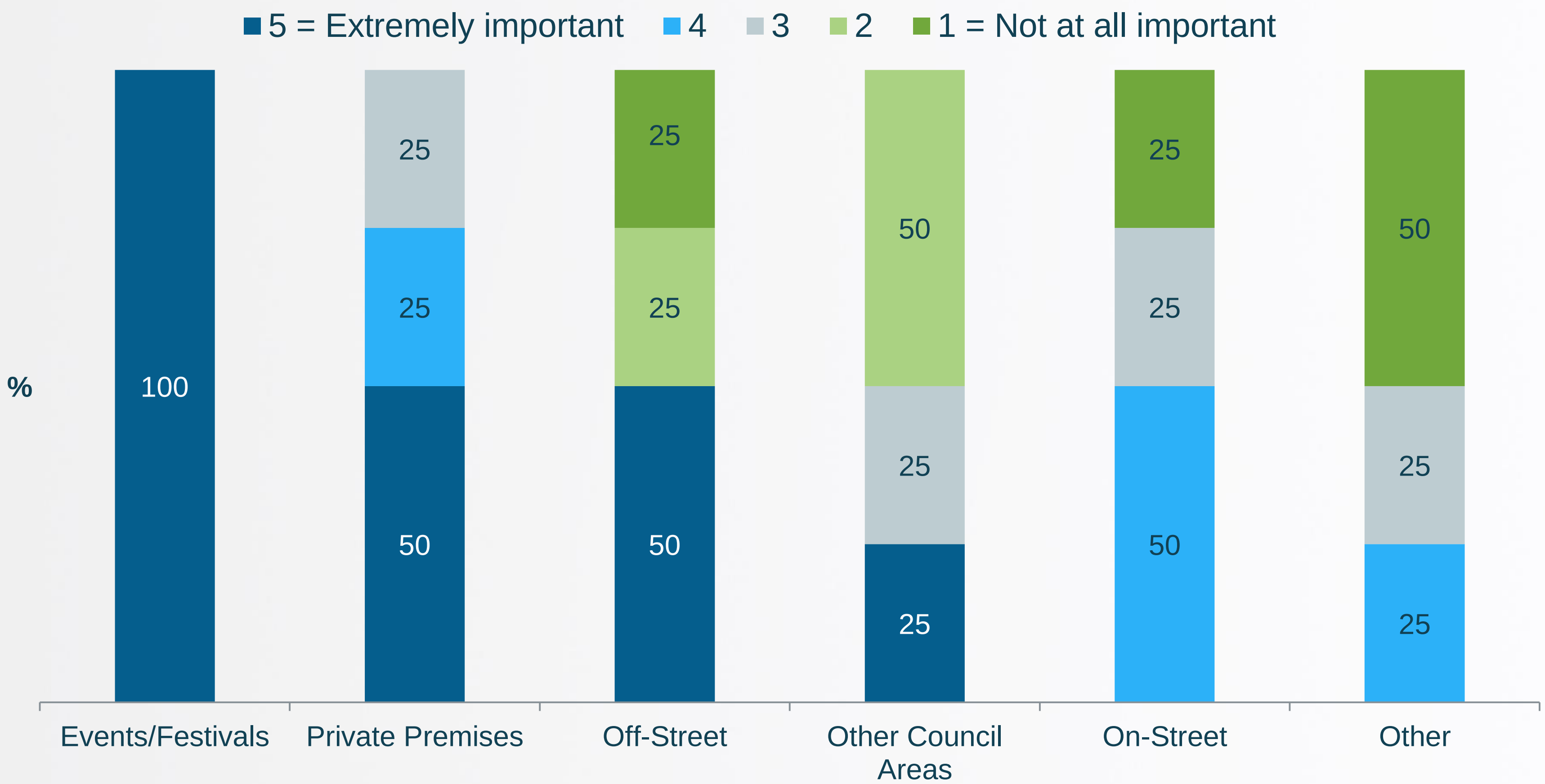


29. How important are each of the following different types of locations to your business, using a scale from 1 to 5, where a 1 indicates it is not important at all, and a 5 indicates that it is extremely important?

Base: All participants (n=19)

PERCEIVED IMPORTANCE OF LOCATION TYPES

Amongst Those with PREMIUM PERMIT TYPES



29. How important are each of the following different types of locations to your business, using a scale from 1 to 5, where a 1 indicates it is not important at all, and a 5 indicates that it is extremely important?

Base: Participants with Premium permits (n=4)

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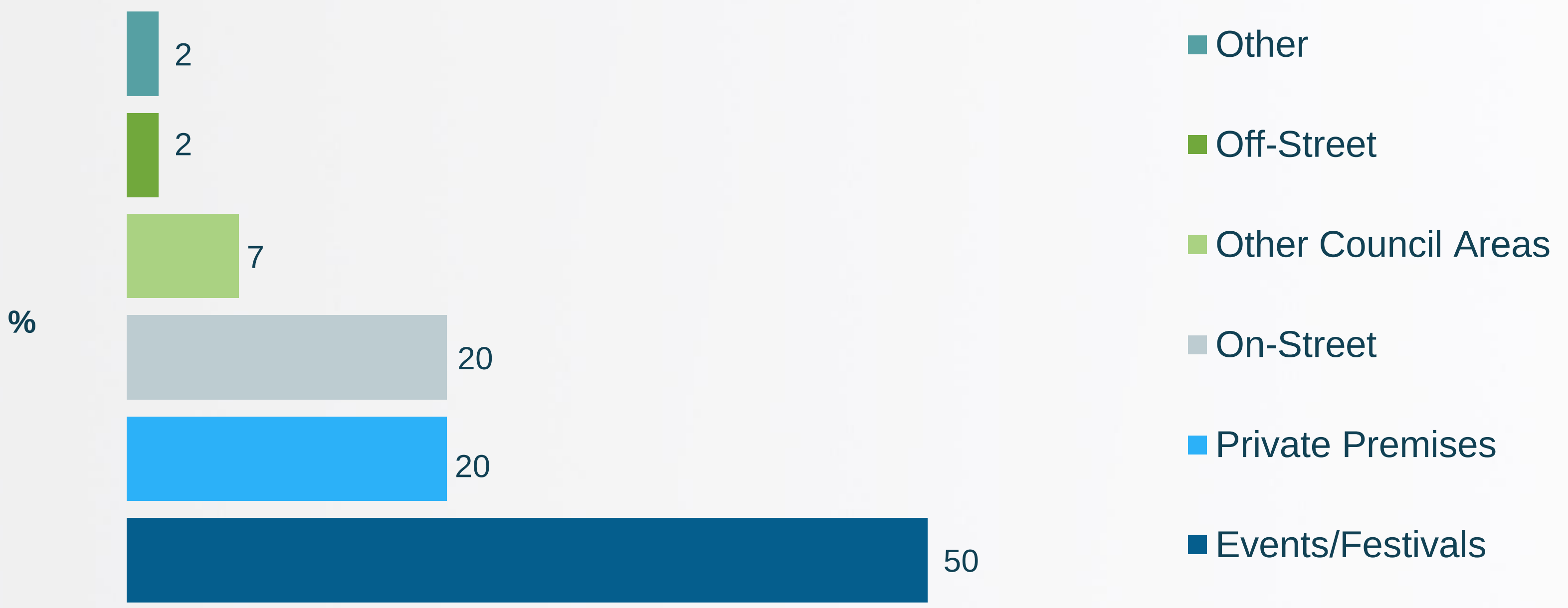
PROPORTION OF TIME SPENT AT LOCATIONS

Events and Festivals were the main attraction for most food truck operators



30. What percentage of the truck's operating time would be spent on each of the following? READ OUT CATEGORIES FIRST. MUST ADD TO 100.

Base: All participants (n=19)

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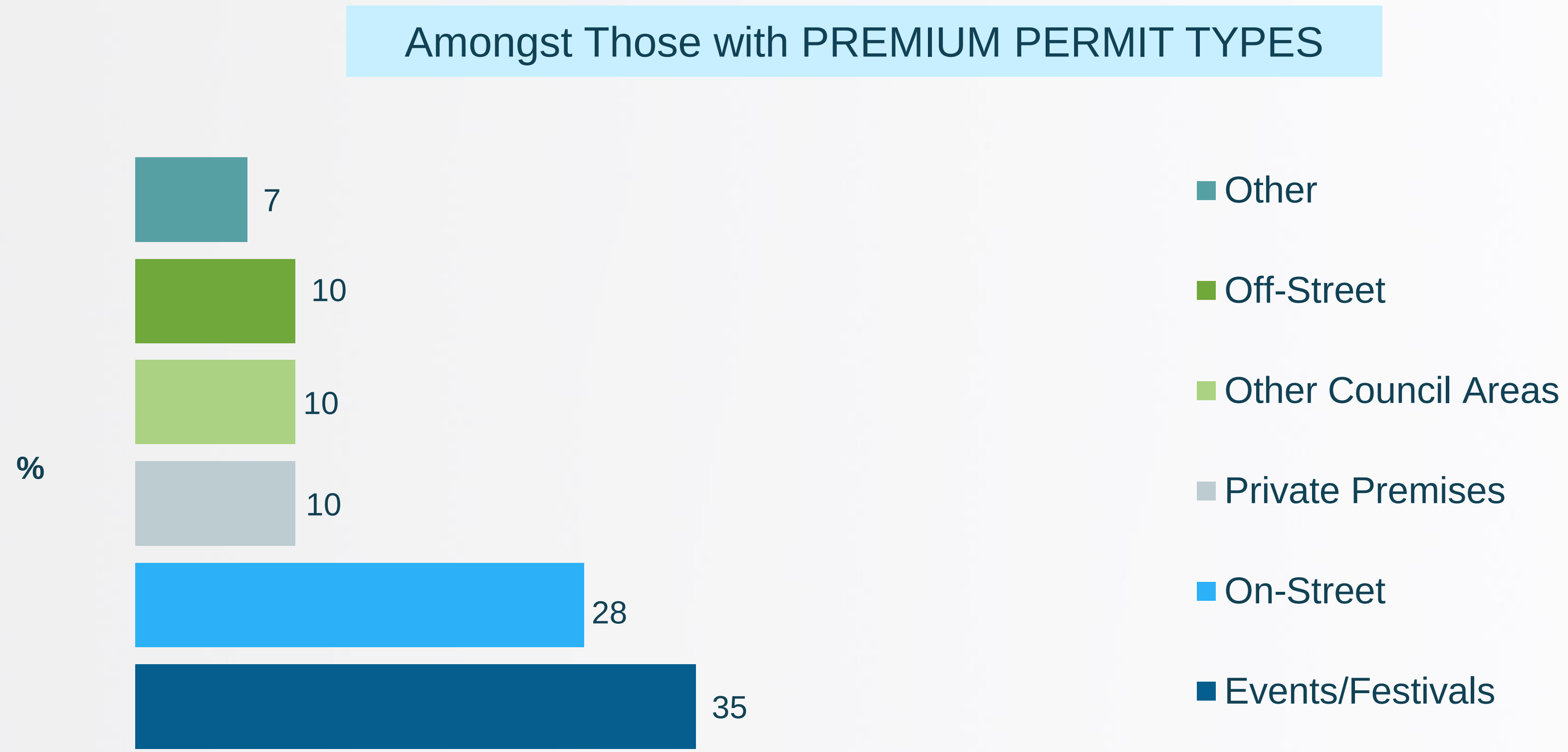
PROPORTION OF TIME SPENT AT LOCATIONS



30. What percentage of the truck's operating time would be spent on each of the following? READ OUT CATEGORIES FIRST. MUST ADD TO 100.

Base: Participants with Premium permits (n=4)

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VALUE OF EACH OFF-STREET LOCATION (4+ out of 5)

Location	(n=19) %	
Customs House	58	HIGHER
Pitt Street Mall	52	HIGHER
Wynyard Park	42	HIGHER
Hyde Park North	37	HIGHER
Joynton Park	37	HIGHER
Bicentennial Park	22	MID
Queen’s Square	22	MID
Victoria Park	21	MID
Sydney Park	16	LOWER
Macquarie Place	11	LOWER
Harmony Park	10	LOWER
Pirrama Park	10	LOWER

31. Now, would you please rate the following off-street locations in terms of how valuable you see them as potential trading locations. Please use a scale from 1 to 5, where a 1 means that it is of little value as a location, and a 5 means that it is very valuable to you?

Base: All participants (n=19)

VALUE OF EACH OFF-STREET LOCATION (4+ out of 5)

Amongst Those with PREMIUM PERMIT TYPES

Location	(n=4) %
Wynyard Park	75
Customs House	50
Joynton Park	50
Hyde Park North	25
Pitt Street Mall	0
Bicentennial Park	0
Queen's Square	0
Victoria Park	0
Sydney Park	0
Macquarie Place	0
Harmony Park	0
Pirrama Park	0

HIGHER

LOWER

31. Now, would you please rate the following off-street locations in terms of how valuable you see them as potential trading locations. Please use a scale from 1 to 5, where a 1 means that it is of little value as a location, and a 5 means that it is very valuable to you?

Base: Participants with Premium permits (n=4)

Research Findings: **Suggested Industry Changes**

SUGGESTIONS FOR CHANGE

Suggestion	(n=19) %
Designated parking \ better parking	53
Events \ areas specifically for food trucks	26
More sites	16
A governing body	16
Better on-street locations	16
Cheaper permits \ better structure	16
Better access to sites \ reduce conflict with other events	11
More support for the app \ online tracking and booking	11
Its fine as it is	5
Better time restrictions	5
State level permits	5
Better margins from festivals \ events	5
Need ability for all food trucks to trade more	5
Access to the heart of the CBD	5
Promotion of food trucks	5

"We should have designated parking spots for food trucks like they have for Go-Get cars"

"Look at the time restrictions with most sites"

"More promotion and more activations. We use to have monthly gatherings with food truck operators called Food Trucks United"

"More sites – particularly for lunch hour"

"Lower the permit fees"

"Organise a food truck event, once a week or once every 2 weeks or so"

"If we had permits that spread wider than just the local authority maybe a NSW trading permit that would be amazing"

"A move towards fresher healthier food"

"Less commission from festivals. Sometimes it's 20%, sometimes it's thousands of dollars in fees and then a percentage on top"

32. In your own words, what changes would you like to see made within the food truck industry? PROBE FULLY. What else? What else?

Base: All participants (n=19)

FURTHER OPPORTUNITIES

Additional opportunities	(n=19) %
None	32
More locations \ central locations	26
Need multiple food trucks in one location to build awareness	16
More events \ festivals	11
Streamline permits \ state wide permits	11
Cheaper permits	11
Designated food truck spots would increase awareness	5
Need more regularity to build clientele	5
Operators to work as a group	5
Night trading opportunities	5
More advertising	5
Central organisation	5
Central information portal	5
More leverage in negotiation with event organisers	5
Synergy between local restaurants and food trucks	5

"Trade within the CBD needs to be opened up"

"If the fees go down and we have a few more good spots, overall that would be much better for us"

"Restaurants see us as competition and a threat rather than beneficial to their business. We need to get more engaged with restaurant operators"

"Streamlining council permits making it more transferrable across the different areas would help greatly"

"To get food truck operators to start acting like event operators in that they are supportive of each other rather than being backstabbing and catty"

"There is a lot of opportunity- we need to be advertised and promoted more"

33. Are there any further opportunities for food truck operators that you feel aren't currently being realised? PROBE FULLY. What are they?

Base: All participants (n=19)

POTENTIAL COUNCIL ASSISTANCE

Suggestion	(n=19) %
Designated parking	37
Advertise the fact that food trucks exist	21
Events \ areas with multiple food trucks	21
Government could provide better sites	21
Its fine now	16
Less fees	16
Council funded events \ generate tax revenue for government	16
Permits streamlined across councils	11
Better booking system	5
The industry needs continual government support	5
There is too much assistance \ hand-holding operators	5
Government could extend trading hours beyond parking limitations	5

"Designated parking spots would be amazing"

"I've been impressed by the initiatives taken to date, hopefully it doesn't become an area they choose to move away from, the food truck industry would suffer without their support"

"They could organise a regular event for food trucks - like Food Truck Friday"

"Advertise more - letting people know there are food trucks out there"

"They should provide better sites, at busier locations. There should also be an allowance for longer parking hours for the current sites rather than following 2 hour parking limits on the signs"

"They need to look at permit prices"

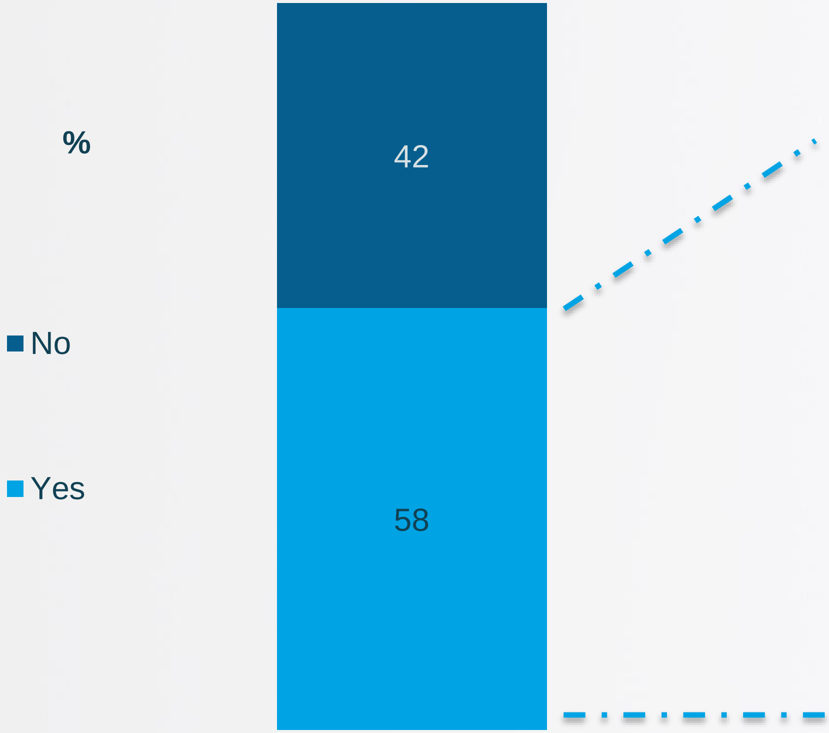
34. Is there anything specific that the City of Sydney could be doing to assist the industry? What could they do?

Base: All participants (n=19)

Research Findings: **The AFTA**

MEMBERSHIP & BENEFITS OF AFTA

Not all members were sold on the benefits of the association



	(n=11) %
Main benefits of AFTA	
Have not seen any	64
Good communication between operators	27
Better bargaining power \ leverage with organisers	18
There are clear potential benefits	9
Solidarity	9
Trade at Chifley Plaza due to AFTA	9

35. Are you a member of the Australian Food Truck Association?
40. What benefits do you gain from your membership? PROBE FULLY. What else?

Base: All participants (n=19)

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PERCEIVED ROLE OF AFTA

Role	(n=11) %
Joint organisation \ united voice	73
Leverage against event organisers	36
Marketing opportunity \ build community	27
Support network	9
Unsure	9

“Basically it was started so we could lobby some things such as being charged huge fees from being at festivals”

“I see it playing a somewhat regulatory position and also a spokes-voice for food truck members. A unified objective voice.”

“Not aware of them doing much at the moment, but they are helping trucks to find private places where trucks can stop.”

“Extend the relationship with City of Sydney. Lobby on our behalf. Look at becoming an event organiser ourselves”

“I think it plays a big role, if we are all together we can develop it more if there is more interest”

41. What role do you see the Association playing? PROBE FULLY. What else?

Base: Participants who were members of AFTA (n=11)

PERCEIVED RELEVANCE OF AFTA

	(n=11) %
Relevance	
Currently not visible enough to be relevant	27
Relevant because made up of industry people	18
Need to remain united to keep relevance	9
AFTA needs to maintain a standard of quality	9
Not amazingly relevant but necessary.	9
Not enough time to commit to AFTA activities	9
Needs to take on role of councils to be truly relevant	9
Don't Know	9

"It is relevant, all of us are food truck operators so we understand our needs"

"It could be fantastic if it's run properly. At the moment it is non-existent. The whole industry itself is kind of invisible"

"Very relevant if they're active. At the moment the hurdle we have is everyone having issues dedicating time for meetings and resolution of issues"

"Very relevant. It's good to have an industry representative to support them and to be recognised by government bodies"

"Still in infancy. Will increase in relevance. Their voice will grow"

42. How relevant do you see the Association being for Food Truck operators such as yourself? PROBE FULLY. Why is that?

Base: Participants who were members of AFTA (n=11)

WHERE AFTA SHOULD CONCENTRATE EFFORTS

Areas to concentrate on	(n=11) %
Gaining greater independence for operators	45
Being a touchpoint between operators and event organisers \ stakeholders	45
Creating new spaces for food trucks	45
Creating new events for food trucks	36
Trying to get a unified focus	18
Advertising \ promoting food trucks	18
Maintaining a standard of quality in food trucks	18

"Mainly pressuring the CoS council or any other councils to get more sites, lower fees and help make food trucks more recognised in Sydney."

"Taking care of all the red tape and things like that"

"Working with the council to improve street trading conditions. Create more of a street food culture by creating more of a buzz which would make it more accepted"

"Look at setting up own event. Find a location that all food trucks can go to at any time"

"Trying to get everyone on board and on the same page is the most important thing. A lot of the guys that did food trucks in the second push of it didn't join"

43. What would you like to see the Association concentrating their efforts on in the near future? PROBE FULLY. What else?

Base: Participants who were members of AFTA (n=11)

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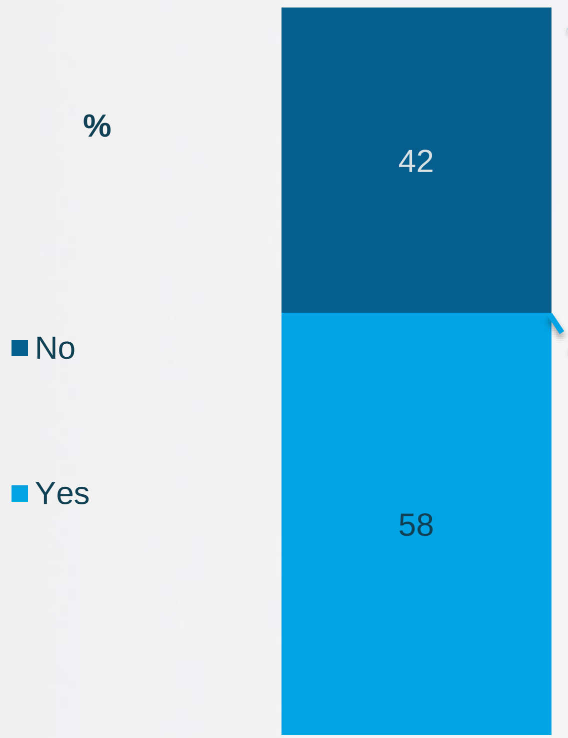
REASONS FOR NOT JOINING AFTA



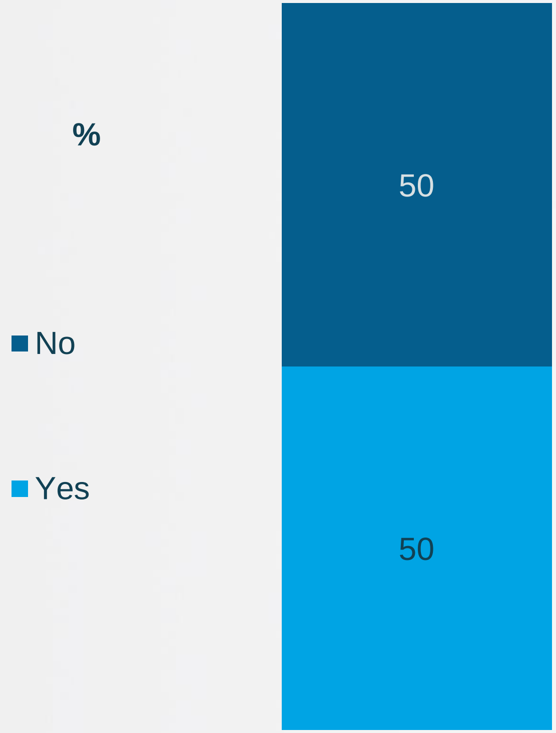
A lack of awareness and follow-through with enquiries were barriers for a few

Reason	(n=8) %
No one got back to me	25
Unprofessional	25
Unrealistic demands \ want everything handed to them	25
See no benefits	25
Don't know anything about them	13
Too busy to join	13
Event organisers don't want to deal with the AFTA	13
Part of a different organisation	13

35. Are you a member of the Australian Food Truck Association?
36. Why have you chosen not to be a member of the Australian Food Truck Association? PROBE FULLY. Are there any other reasons?

Base: All participants (n=19)

INTEREST IN JOINING AFTA



Non-members who weren’t interested in the AFTA tended not to see relevance in the association

	(n=4) %
Benefits of joining	
Haven't seen any yet	50
Support network	25
Leverage against event organisers	25
Joint organisation	25

37. Are you interested in becoming a member of the Australian Food Truck Association?
38. What benefits do you hope to gain from membership? PROBE FULLY. What else?

Base: Participants who were not current members of AFTA (n=8)

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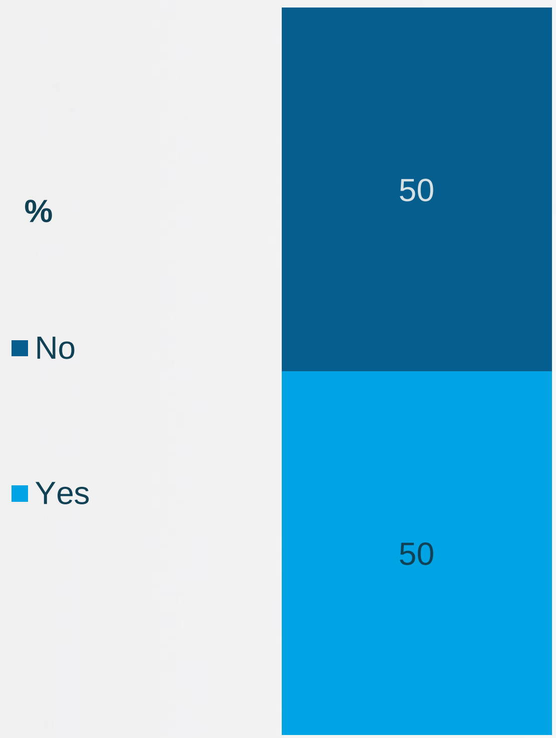
REASONS FOR NOT BEING INTERESTED



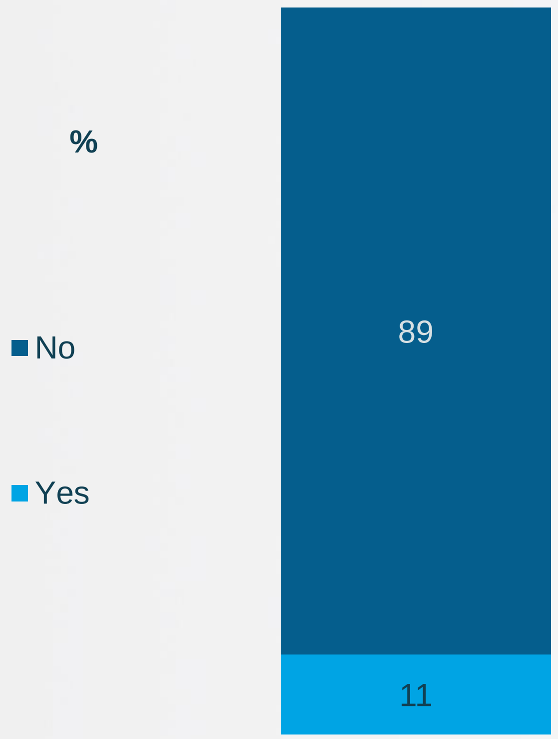
Perceptions were not particularly positive

Reasons for not being interested	(n=4) %
Don't respect them	50
Lack of professionalism	50
They're ineffective	50
I know nothing about it	25
Haven't heard any tangible benefits as yet	25

37. Are you interested in becoming a member of the Australian Food Truck Association?
39. Why is it that you're not interested in joining? PROBE FULLY. What would they need to do to interest you?

Base: Participants who were not current members of AFTA (n=8)

MEMBERSHIP OF OTHER ASSOCIATIONS



Few were members of other associations

The two participants that were members of other association were members of:

- Australian Mobile Food Vendors Group
- Restaurant and Catering Association

44. Are you a member of any other industry association? If Yes, which?

Base: All participants (n=19)

FEEDBACK FROM AFTA REPRESENTATIVES

The AFTA representatives saw the role of the AFTA in a similar way to the food truck operators – indicating that it encompassed lobbying, support and promotional services

"Promoting credible and compliant food trucks to main stakeholders, to lobby, to provide support."

"To be an industry representative to support food truck operators that is recognised by government bodies."

The benefits of membership were said to include discounted event fees, and business consulting. However, there was also an indication that the organisation was not currently particularly beneficial due to its lack of recent activity

"Credibility and access to workshops, business consulting or discounted event participation fees for some events we're working on."

FEEDBACK FROM AFTA REPRESENTATIVES

There were indications that 'relevance' would increase as the association matures and more members become involved

"It comes down to how active the members are and how much time they are willing to give to be able to see the benefit"

"Not very relevant at the moment because it hasn't been very active and it's fairly new and it's something that needs to evolve"

In terms of a future focus for the AFTA, suggestions included lobbying for better trade and promotional opportunities – but also for more direction from within the association

"Lobby group for the improvement of trade, promotions of credible food trucks to events"

"More staffing. More leadership. Having an internal plan and a plan for our members. More communication too - but we need staff to do all that."

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Summary of Findings

Summary: TYPICAL PROFILE

- Took 6 months to set up, at a cost of $140K
- Have been operating for 1 to 2 years
- Employ 2 full-time and 3 part-time staff
- Take in $300K* / year ($83K staffing, and $82K other costs = $135K profit)
- Take just over a year to make a profit
- Don’t own a bricks & mortar business but have interest in doing so
- Operate 4 days a week (Wednesday through Saturday)
- OR less often if relying on events/festivals

* Includes the $1M figure

Summary: PERMITS

- The bulk of operate with a **street-only** permit
  - This allows them access to the **events/festivals which are seen to be lucrative**
- They tend **not to see value** in the Premium Permit types for three main reasons:
  - **Too costly** (prices would need to decrease significantly to entice (e.g. half current price)
  - **Too restrictive** (the premium site operation times do not allow for profit maximisation)
  - **Competition** (the number of ‘good’ locations is limited, and others may book them)

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Summary: OFF- STREET LOCATIONS

- Some **don't see any benefit** in off-street locations (those who rely on events/festivals)
- However, they do **guarantee the ability to park** and therefore communicate location with 'followers'.
- High traffic areas also equates to **greater exposure**
  - Ideal for **new entrants**

- Trading times at off-street locations seen to be **too restrictive**
- **Not all off-street locations were seen to be suitable**. The best being Customs House, Pitt St Mall, Wynyard Park, Hyde Park North (despite being described as 'hidden') & Joynton Park
- It follows that there is a **great reliance on events/festivals, private functions, and on-street locations**.

Summary: SUGGESTED CHANGES

Ideally, the operators would like the following:

- Dedicated parking spots / bays
- The creation of a food truck event
- An increase in the number and quality of off-street locations
- A decrease in the permit prices
- A loosening of restrictions
- Greater promotion of the food truck initiative

Summary: The AFTA

- Most participants **were members** of the AFTA
  - However, not all members were 'sold' on the AFTA being of benefit
- Overall though the main potential benefit of the AFTA was seen to be the **ability to create a united approach** with dealings (e.g. with festival organisers)
- A main difficulty appears to be the **lack of visibility** of the association in recent times
  - Along with this has been a **decline in perceived relevance**
- Some non-members have **poor perceptions** of the AFTA. However, other issues (e.g. administrative) may also be a barrier to joining in some situations
- Interestingly, some feedback from the association also **reinforced these issues** – though there was **still optimism** in that increased membership would bring with it greater authority, visibility, and the ability to act