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Towards a consistent account of firm survival

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APPENDIX 1

Yellow Pages Map for North Yorkshire

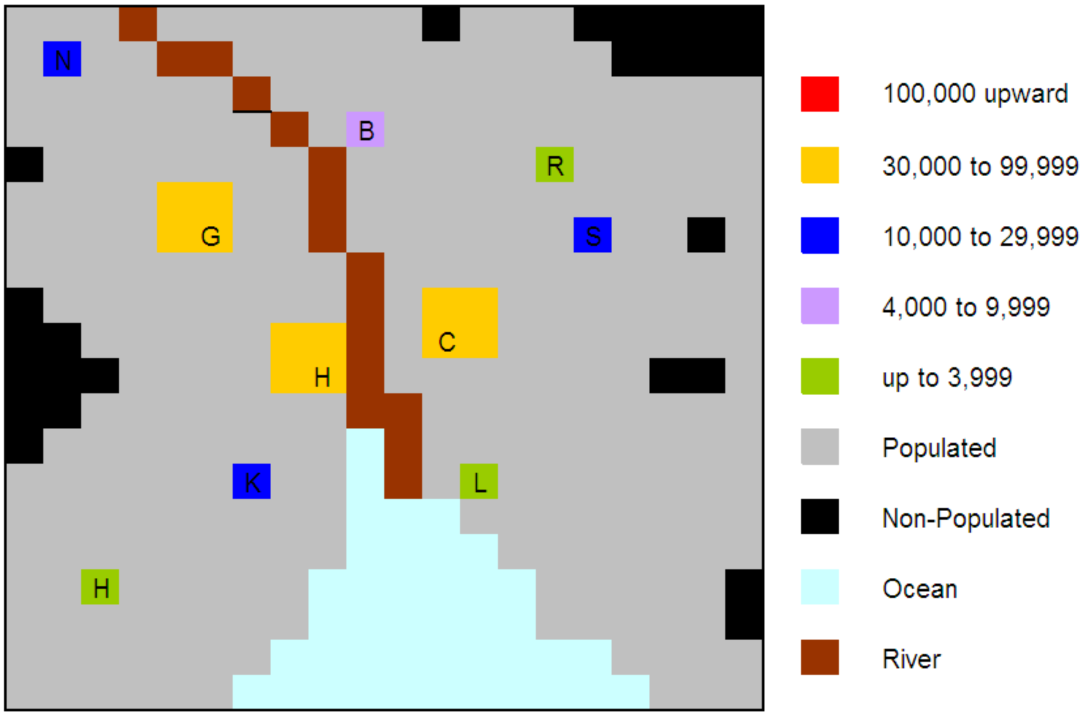
THIS YELLOW PAGES AREA

This map shows the area covered by this Yellow Pages together with surrounding Yellow Pages areas.

- **NEED INFORMATION OUTSIDE YOUR OWN AREA?** See page 12
- **HOW TO GET THERE** See pages 2 and 3 for Route Planner
- **FIND THE STREET** See pages 4, 5, 6 and 7 for Town Maps

APPENDIX 2
Comparison of the Four Australian Plots

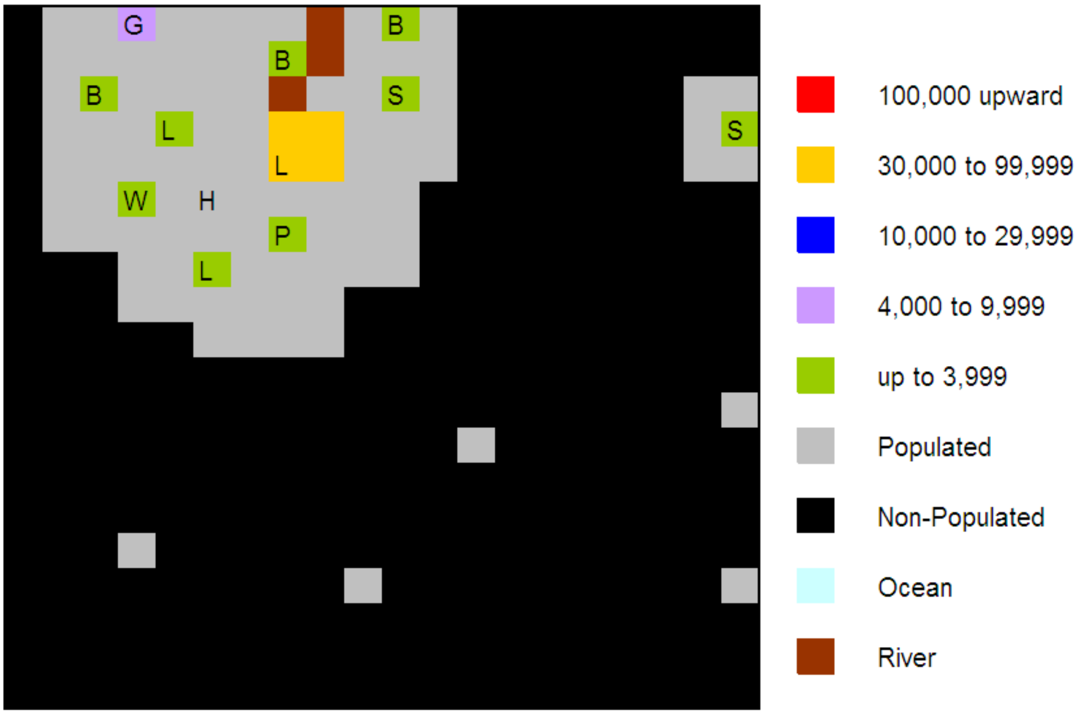
Hobart



Approximately 12,000 square kilometers

The Hobart plot is characterized by several unique landscape features. The Derwent River divides the landscape in two, separating the cities of Hobart and Glenorchy from Clarence. These three cities have between 40,000 and 50,000 residents, with several satellite towns holding 15,000 to 29,000 or less contributing to an overall population of 200,000+ in the greater Hobart area.

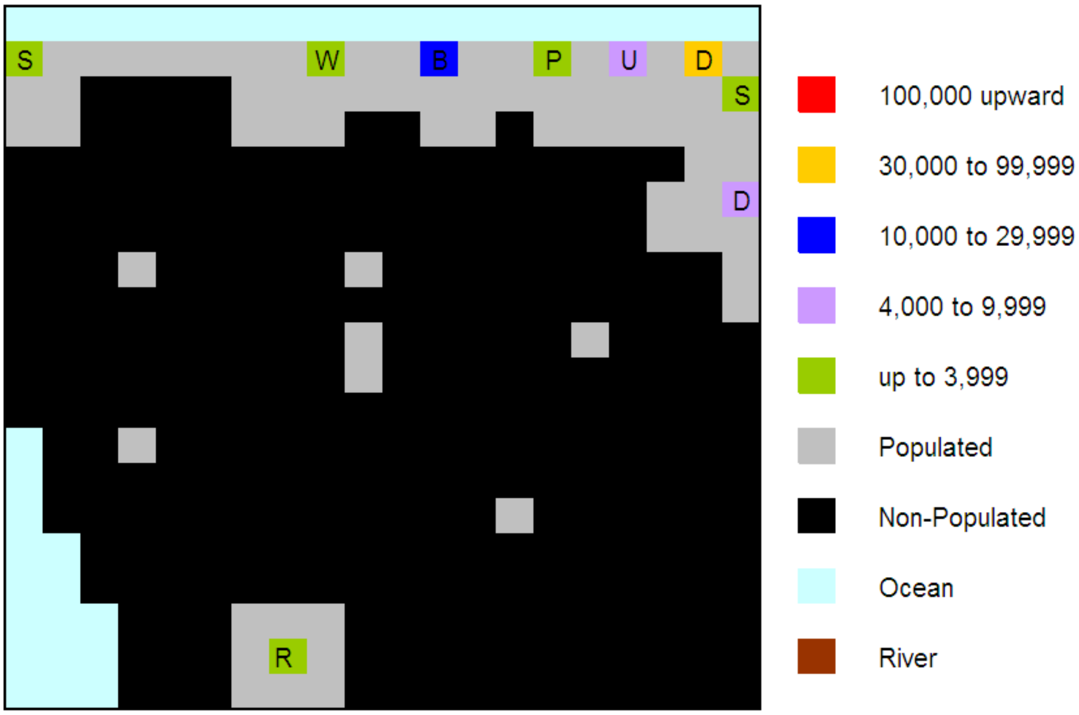
North East Tasmania



Approximately 12,000 square kilometers

The North East Tasmania plot is characterized by a single city (i.e. Launceston) with around 65,000 residents. The Tamar River divides this population in two. These are several satellite towns holding 3,000 or less contributing to an overall population of 119,000+ in the North East Tasmania area.

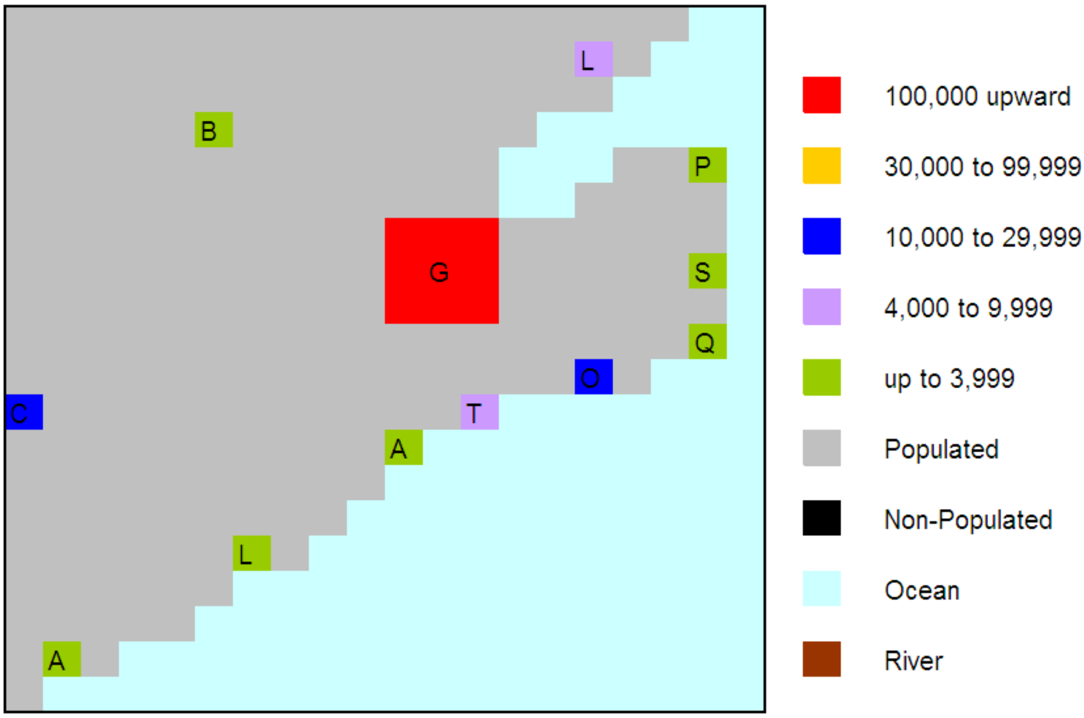
North West Tasmania



Approximately 12,000 square kilometers

The North West Tasmania plot is characterized by having two cities, Devonport (39,000) and Burnie (19,000), and several smaller towns that are predominately located on the Bass Strait coastline. The overall population of the North West Tasmania area is approximately 101,000+.

Geelong



Approximately 12,000 square kilometers

The Geelong plot is characterized by having one large city (i.e. Geelong) with around 140,000 residents. Many smaller towns, most located on the coast, dominate an area that is subject to seasonal increases to overall population. The overall population of the Greater geelong area is 200,000+.

APPENDIX 3

Selected Key Ecological Journal Articles

Paper	Significance	cited in the Natural Sciences*	cited in the Social Sciences**
Watt (1947)	Classic paper on ecological patterns & processes	870	0
Root (1967)	Developed the concept of an ecological guild	767	0
Schoener (1974)	Developed the concept of resource partitioning	1378	0
Connell (1980)	Classic paper of inter-specific competition	584	0
Wiens (1989)	Classic paper on spatial scaling	1048	0
Levin (1992)	Classic paper on pattern and scale	1324	0
Jones et al, (1994)	Development of ecosystem engineering concept	490	0
Laland et al, (1999)	Development of niche construction concept	40	0

* Citations relate to each articles appearance in the ISI Web of Knowledge database.
** Social Sciences relate to specific sociology, economics and management/organization studies journals.

Statistics correct at the 14/5/2007

APPENDIX 4

Example of Formal Interview Transcript

Marti Zucco grew up in a family of bakers who had always being engaged in enterprise. From the age of ten, Marti was involved in the development of pizza in Victoria. His brother, Vince, opened one of Victoria's first pizza shops in 1968. His parent also latter converted a bakery into a pizza/Italian food shop. Eventually Vince was one of the first pizza pioneers to establish a shop in Hobart Tasmania in 1973. Prior to this, Marti had also brought a shop in Victoria and continued to trade until he sold the business in 1974 to fund the purchase of another location that his parents had previously operated. Eventually Marti left the industry temporally to travel Australia. These travels brought Marti to Hobart where brother Vince was by now running the very successful pizza restaurant, Romano's.

Marti instantly fell in love with the North Hobart due to its likeness with the Melbourne suburb, Carlton. He was told that most people that start a business in North Hobart go broke. Unperturbed, Marti opened Marti's Pizza House in 1978. This business was built upon a simple philosophy that Marti felt was universal to the restaurant industry, regardless of location. There are three critical factors that determine success. Great food, great service, and great ambience. Achieve all three and dominate, achieve two out of three and do ok, achieve one or less and fail.

Although about a dozen pizza shops/restaurants existed prior to Marti's entry, his restaurant soon became dominant. The location in North Hobart proved to be a wise one as the area developed into a restaurant hub. Marti formed the Pizza Owner's Association as a means to ensure what knowledge and assistance could be shared across 'friends' was in the hope of further developing the legitimacy of the pizza industry. These early pioneers met regularly at Vince's restaurant and frequently visited each other's establishments. Strong relationships were formed, and for many Hobartians, eating pizza became associated with the practice of 'winding down' after a night of partying. The Casino's patrons and staff in particular provided regular custom. Within the industry little rivalry appeared to exist with friendships commonplace across all participants. Young employees had left the pioneers to establish their own shop, quite often with good support from *past employees and other industry members. The market was busy, growing and profitable for all it seemed.*

Throughout this period it is clear that Marti was an entrepreneur, intent on doing things differently, for the purpose of doing this better. He was the first guy to mess about with the pizza dough. After much trial and error he managed to develop dough that could be made in advance, thus reducing much waste. Due his dealings with suppliers in Victoria, Marti was the first person to use Mozzarella and Ricotta cheese on Hobart pizzas. The result was a pizza with superior taste and far less oil. He also imported and distributed fine coffees and cheeses to others in the general hospitality industry. He continuously pursued the processing of ingredients to achieve a better quality product. Many other pizza shop owners adopted many of his innovations.

However, the industry's profitability and growth represented an attractive proposition to others. Most notably, in 1983 the international pizza franchise chain, Pizza Hut. Their entry to the market was widely seen as increasing overall demand for pizza. At this point though there were other factors, that when combined with Pizza Huts entry, changed the nature of the Hobart pizza market quite markedly. Firstly, just as demand was increasing, drink-driving laws introduced Random Breath Testing to curb driving fatalities. As a consequence of changing social behaviour; more consumers eating pizza at home as an evening meal; a decline in the popularity of the Casino associated with alternative venues in the Hobart CBD; and increasing pressure on margins related to industry competition.

During this phase, simply operating a pizza Take Away shop was not enough. The importance of offering a range of food (e.g. pastas, sorbet, and fine coffee) in a comfortable and relaxing atmosphere was ever increasing. For many smaller operators, lacking a prime position, achieving at least 2 out of the 3 essential elements noted previously was difficult if not impossible in comparison to industry leaders. As an industry leader, Marti increased marketing efforts; advertising increased; product quality continually experimented with; delivery drivers recruited and home delivers commenced. During this period, the industry changed from one of low volume/high profit to one of high volume/low(er) profitability. Those with a quality product, and with passionate faith in their product were favoured. Many 'young guns' expanded their operations in an attempt to *capture greater market share in a now burgeoning market. Many of the existing friendships provided a means to structuring joint ventures and access to resources.*

Not surprisingly, a high degree of innovation accompanied this shift towards high volume/low(er) profitability. Having already previously partially addressed the issue of pizza oven productivity by resigning and installing a four-deck oven, Marti was the second restaurateur to install the new style conveyor belt pizza oven. The conveyor belt ovens significantly increased productivity. Employee burns were decreased, as were burnt pizzas. They were cheaper to run in comparison to conventional pizza ovens, required less kitchen staff and enable peak times to be better managed. Pizza trays also changed from aluminum to black steel and then to black steel with holes that provided allowed more even cooking. Also, as a result of various customers requesting alternative ingredients (e.g. mangos) on their pizza, many operators experimented with 'gourmet' pizzas. This encouraged the use of wood fired pizzas, but for many this resulted in the reintroduction of past inefficiencies.

As the industry grew, informal relationships became more guarded with regards to whom could access industry knowledge. While many past and favoured employees had been encouraged and supported to start their own pizza business, a division between those inside and outside of this circle of friends developed. However, beyond access to the know-how, one other factor seems to have been important to prospering in the new competitive environment. There appears to be little substitute for passion. The degree of passion related to staying true to developing the best pizza possible, to continually experimenting how to improve quality. This, rather than focusing solely on the bottom line is credited with enabling reputations, loyal customers, and profits to be maintained throughout the transformation of the industry.

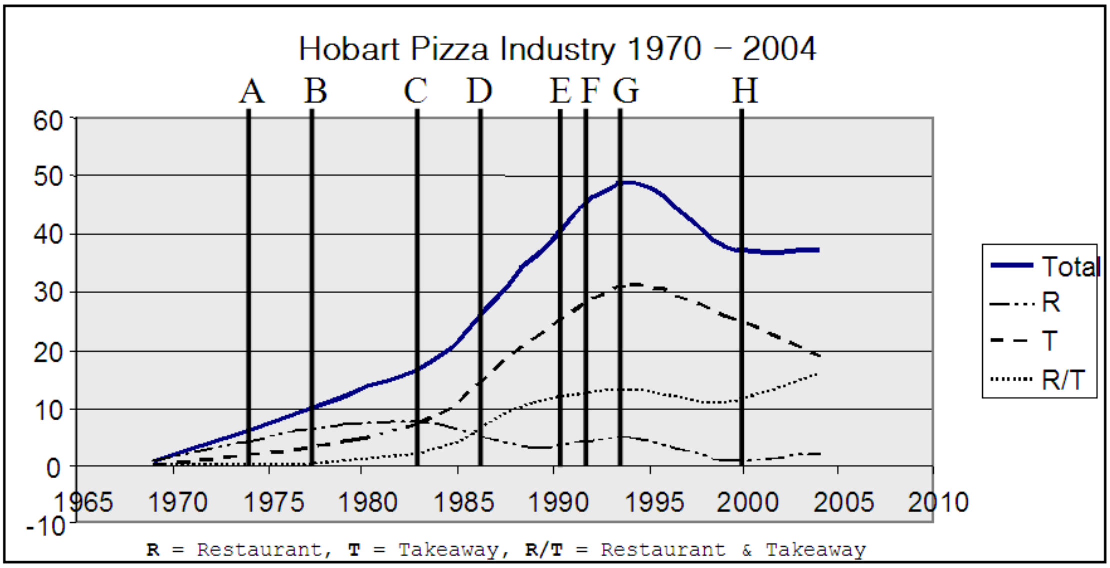
APPENDIX 5

History of the Hobart Pizza Industry

Introduction

The Hobart pizza industry has a history that spans approximately 35 years, and entrepreneurial Italians and several external events have largely driven its growth. There have been three distinct and observable epochs. The first period (1970 – 1983) covered the years before the entry of the national franchise chain, Pizza Hut. The second period (1984 – 1994) was post Pizza Hut, but prior to the entry of the second major national franchise chain, Pizza Haven. The third period (1995 – to present) captures the post Pizza Haven period. Across all three periods, significant events and happenings occurred that were to prove favourable or unfavourable as the case may be to the participating firms. The pioneering firms, with a few exceptions, were typically descended from Italian families. They introduced not only an alternative food source, but also a tremendous passion for excellence. This pursuit of excellence has clearly motivated and guided the development of the industry during the past 35 years. Figure 1, The Hobart Pizza Industry, 1970 –2004, highlights the key events and their relationship to the growth of the industry population.

Figure 1 – The Hobart Pizza Industry 1970 - 2004



Period Effect legend

A = Opening of Wrest Point Casino
B = Introduction of the 1976 liquor Act
C = Introduction of Pizza Hut & Random Breath Testing
D = The Beginning of Home Delivery
E = The 1990 Recession

F = The Introduction of Conveyor Belt Ovens
G = The Introduction of Pizza Haven
H = The Introduction of the GST

What is observable is that the carrying capacity of the industry appears to have settled around the mid to high 30s during the late 1990s. In all, over 100 firms have entered the market with currently around 65 disbandings. In general, the industry has been transformed from low volumes and high profits to one that now has high volumes and low margins. The many social trends that have accompanied the industry's growth are perhaps best considered throughout the following discussion of each distinct period.

Period One – Pre Pizza Hut

Just as post-war immigrants help to establish an Italian restaurant culture in other Australian cities, Hobart was no different. It would appear that the initial knowledge related to producing pizza was imported and/or inherited by first, second and third generation Italians. Initially, three well know eating-houses represented the Pizza industry in Hobart; the Etna, Ramano's, and the Brazil. The industry was just like many other multicultural offerings that increasingly became apart of Australia's culture. It was not without its own special theatre with the tossing of the dough considered essential to producing the perfect pizza.

An event that had considerable influence on the industry's growth was the introduction the Australia's first casino in Hobart. The Wrest Point Casino benefited from a relaxing of operating hours. As a result, rather than Hobart having the lights turned out at 10pm for those desirous of a beverage, the party continued on down at the casino. Initially, this had the effect of producing two specific new groups of clientele. Those that had partied until late and those that had served the party until late. Both had similar needs, a place to unwind and eat. This proved to be a windfall for the handful of pizza restaurants in Hobart. Other more traditional providers of takeaway and restaurant food were closed and not looking for any additional business. The attraction of the casino acted to draw many patrons, many of who dispersed back into Hobart throughout the evening. So a new customer base for pizza restaurants was born and continued to grow, as having a late night pizza became a normal event for many. As will be discussed during the post Pizza Hut – Pre Pizza Haven period, the casino also became an important place for pizza restaurant owners and their staff to meet, relax and share knowledge.

The next event that influenced the industry was the relaxing of hotel trading hours. Coming in to effect in August 1977, the Licensing Act of 1976 provided this fledging industry with much impetus. The volume of hungry patrons grew exponentially. Many new pizza restaurants that would remain as Hobart's favourites were established at this time. These included; The Godfather, Silvano's Pizza House, Cantina Pizza House, Marti Zucco Pizza, and the Casablanca. All five establishments have endured and have employed many eventual pizza restaurant owners. During this period, the demand was so great that at the Cantina Pizza House, its owners, Robert and Lynne Bernardis needed to turn off the lights so as to prevent more patrons from interrupting their cleaning of the premises.

The emerging legitimacy of the pizza industry in Hobart was based upon many different styles of operating formats. From the traditional Etna, to Marti Zucco's modern Pizza House, to Mario Di Ienno's takeaway styled Pizza Palace, pizza was already challenging other forms of restaurant cuisine. The availability of physical resources was not difficult. Marti Zucco established a presence in North Hobart amid concerns the area was not suitable for a restaurant. Marti, like many of his fellow pizza restaurant operators, many of whom banded together to form the Pizza Owner's Association, based his future success on three factors. The first was great food. The pizza had to be made from the best fresh ingredients and cooked to perfection. To a man, it would seem these pizza pioneers were very passionate about the end product. The second was service. For many, the concept of service varied from table service, to the provision of a sense of theatre that drew customers into the production process. As the industry began to emerge as a genuine alternative to other types of restaurants, ambience became the third critical factor.

During this early period, many of the pioneers experimented and exhibited very entrepreneurial practices. For example, Marti Zucco using his previous contacts, knowledge and operating experience of operating pizza restaurants in Melbourne introduced many new innovations. These included; new types of dough mixes, the use of higher quality (mozzarella and Ricotta) cheeses, and the sourcing / distribution of fine coffees. Many of these practices were shared amongst friends and became industry norms. The medium of transfer was the weekly socializing activities, such as ten-pin bowling and Sunday nights at the casino. It was common for staff to be part of these get-togethers and this seems to have added to their abilities to leave their employment and start up their own pizza restaurant. The fact that these early pizza restaurants were distributed throughout Hobart's suburbs and not in direct competition seems to explain the ease at which industry specific information was transferred between the pioneers.

Period Two – Post Pizza Hut – Pre Pizza Haven

The next major event in the industry was the arrival of the national franchise chain Pizza Hut. Far from being viewed negatively, Pizza Hut's presence appears to have benefited incumbents in three specific ways. The first, a substantial increase in the primary demand for pizza. Pizza Hut's entry introduced an array of advertising activities that by and large promoted pizza. Secondly, for the more entrepreneurial pioneers, opportunities were abound. The media used by Pizza Hut (e.g. leaflets, TV, radio, etc) was highly visible and relatively easy to imitate. Those with flair grew with the market to establish a stronger presence, positioned on the basis of their existing orientation towards quality. The last benefit introduced was a by-product of the last two issues. This process of 'educating the public' about pizza led to a change in the time that pizza was consumed. Pizza became not solely the domain of the drunken and partied, it moved back towards those about to party, those thinking about dinner or even lunch. Ultimately, the arrival of Pizza Hut increased the legitimacy of the pizza industry by assisting incumbents and redefining the *how* and *when* of pizza consumption. By altering the hours during which pizza was consumed, many pioneers were encouraged to remain in the industry. The need to be 'on deck' when production was peaking, typically after 10pm, had eased. Owners could now work restaurant hours, returning to a more normal life through leaving a manager in charge to finish the late shift.

As can be seen in Figure 1, the industry experienced a huge increase in foundings after Pizza Hut's entry. In 1986, with the industry growing rapidly, the Adelaide based Dial-a-Dino entered the market to introduce the concept of pizza home delivery. This change is credited with increasing turnover threefold in many well-established places. Many locals responded setting up their own home delivery capabilities. New systems and staffing arrangements needed to be developed to deliver a new form of service that was unique to pizza. Pizza Hut again became the hero of many local restaurants. There TV advertisements, while clearly aimed at creating primary demand for the Pizza Hut product, had a spill over effect. It was common for everybody else's phone to start ringing as soon as Pizza Hut advertisements had been shown, such was the impact of Pizza Hut on primary demand throughout Hobart. What was emerging however was that many consumers were loyal to existing pizza restaurants whose focus on quality was the most influential determinant attribute of their intention to purchase pizza.

Even so, there were calls from incumbents for market regulation. Marti Zucco feared the market (at this stage 26 firms) was on the verge of saturation. Stephen Konkorzyski also felt that each area should have a limited number of pizza shops. Robert Redshaw of Dial-a-Dino felt that with their mainland backing, it was best to let the market decide. For Garabaldi's, a pioneering restaurant since 1973, being a sole operator of Italian origin with poor English did not seem to lend itself to receiving phone orders as opposed to having orders come from a menu board on a shop wall. They appear to have been an early casualty of the move towards the home delivery revolution. Adding to this new trend was the increasing acceptance of the Random Breath Testing laws enacted in 1983. Fewer and fewer consumers were out and about driving around at night and the whole concept of having pizza delivered was becoming the normal way of acquiring a pizza. By now, additional customer segments had emerged. Taxi drivers not only became loyal customers at many pizza restaurants, but also became a source of recommendation for many of their passengers. Many of the police who manned the random breath testing stations also became regular customers.

During this period of rapid change, the significance of the casino on providing a steady flow of hungry patrons had lessened. Many alternative nightclub venues had emerged and the competition between existing pizza restaurants had now intensified. The market was moving towards high volume / lower margins. Many sought to take advantage of technological innovations to increase their advantage. For example, aluminum trays gave way to steel trays; Marti Zucco replaced his traditional deep oven with a self-designed four-deck oven. Robert Bernardis installed a computerized system that enabled him and his wife to streamline the processing of wages and stocktaking. For the Cantina Pizza House this was a critical investment that enabled the late shift work to be delegated and monitored simultaneously. Software that recognized the callers phone number and recalled past preferences and delivery addresses also became popular with the larger operators. Many operators were increasingly influenced by the preferences of their customers who sought variations, leading to development of gourmet pizzas and in some instances, woodfired pizzas. In the 1989, the market for home deliveries was consolidated with Pizza Hut's acquisition of all of the Dial-a-Dino sites. Without the market power and resources of Pizza Hut, many of the pioneers of the Hobart market used existing friendships to embark upon joint ventures aimed at capturing a larger slice of the growing market.

In 1990, Australia became dominated by the recession *that it had have*, however this downturn in general market conditions proved a bonus for the pizza industry. A combination of not being perceived as a luxury good and the downward pressure on pizza prices resulted in pizza being categorized as a normal good with elevated status during hard times. While fewer families could afford to dine out at even moderately expensive restaurants, the price bundling of a family pizza meal complete with assorted accessories became increasingly popular. This, despite the introduction of the introduction of the successful Praties (1991 onwards) concept and the immediately successful entrance of McDonalds (1989 onwards).

Perhaps the most contentious innovation was the conveyor belt oven. Introduced during the early 1990s, its impact is viewed differently by many restaurateurs. For many, the conveyor belt oven has introduced increased efficiency. Employee burns were decreased, as were burnt pizzas. They were cheaper to run in comparison to conventional pizza ovens, did not suffer temperature fluctuations from continual monitoring of pizzas, required less kitchen staff and enable peak times to be better managed. For others though the conveyor pizza oven (initially around $20,000 compared to about $2500-4000 for a traditional oven) introduced potential decreases in effectiveness and quality. Some argued that the simplicity of its operation encouraged the hiring of less skilled labour whose knowledge of the intricacies of dough lead to pizzas being merely toasted and not cooked. It would seem that in the skilled hands, the conveyor belt oven introduced efficiencies. Alternatively, in the hands of the unskilled, they represented a potentially ineffective means on making pizza. Whatever the perspective held, to the smaller operator, many of the potential efficiencies associated with conveyor belt ovens were unattainable due to the initial investment required to acquire one.

This factor was perhaps dependent upon the size of operations. For instance, if there was a separation between staff that served customers who *dined in* from those who cooked, then the use of less skilled kitchen staff was perhaps limited to pizza quality. Whereas, in smaller operations, it is possible that the use of less skilled staff to cook pizza and serve customers may have put at risk attainment of the three success factors (i.e. great food, great service, & great ambience) discussed earlier. As the industry emerged as a direct competitor to others sections of the restaurant market, these three factors became more important, enabling operators to compete of the basis of quality rather than merely price, an eventual outcome of market competition. The number of operators peaked at 48 in 1994, the same year that the next franchise chain operator, Pizza Haven, would enter the market.

Period Three – Post Pizza Haven

Pizza Haven, entered then market, introducing a ‘fastest gun in the west’ approach to pricing and promoting pizza. Pizza Haven appeared more intent on capturing market share than on promoting the industry as a whole. This view of their intentions was commonly held by independent shop owners and was largely based on the perception they were more interested in selling franchises than pizzas. The impact of Pizza Haven and their pricing led strategies appears to have been very significant. During the five years prior to Pizza Haven’s entry (1989 to 1993), the population of firms in the industry experienced growth of 47%. This despite the effects of the recession, and the introduction of significant competitors (e.g. Praties & McDonalds). During the five years after Pizza Haven's entry (1995 to 1999), the population of firms in the industry experienced a decline of 46.5%. This despite the recession having past and increased profitability being locked in by the industry wide adoption of various technologies.

Rather than taper off prior to a decline, it would appear that the industry's population of firm's crashed to a new carrying capacity as a result of the extreme competition introduced by Pizza Haven. Firms that were unable to maintain prerequisite levels of great food, service, and ambience were in the direct line of fire. Market forces, forces that had continually assisted them previously, selected against them. It would seem that while many firms had adapted to an operating environment through a quality baseline, other firms unable to deliver (or develop in time) these three success factors were susceptible to competing upon a price dependent baseline.

There is clear evidence that new entrants have entered the market and succeeded with an approach based on quality. Two new restaurants that provide such evidence are Da Angelo's and Paesano Pizza. Both are positioned on the highest quality food, encourage BYO and have extensive wine lists that to cater to their middle / upper class target markets. Both avoid trying to compete for the price-conscious customer. They rely upon word of mouth to stimulate demand. This is not to say that they aren't looking for other opportunities within their marketplace. Da Angelo's has recently begun catering to organisations, thereby maximising the output of the physical assets. It would seem that while pizza has been elevated from a meal fit for the court jester to one fit for royalty, both customer types still exist. While the court jester's needs can be satisfied by the likes of Pizza Hut, Pizza Haven, and Dominos, it takes an entirely different type of business model to compete within the quality end of the market.

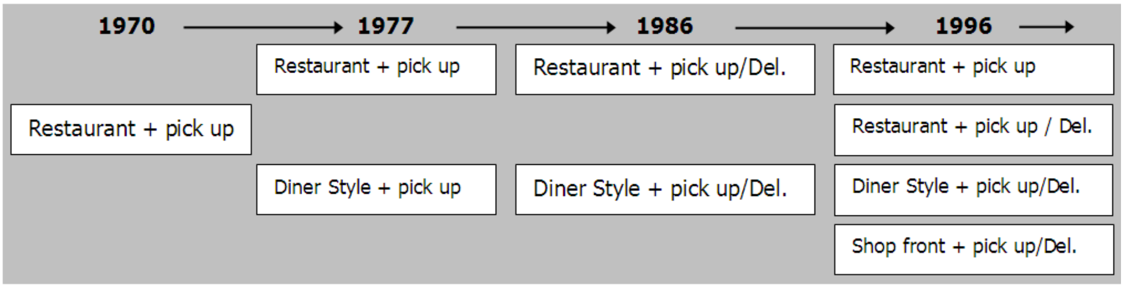
The middle ground would appear to be the most dangerous path traveled. If the time period that covers the two years prior and after to Pizza Haven's entry (1992 to 1996) is considered, it is clear that survival is a tough assignment for new entrants. Of the 23 start-ups during this time period, only 5 have survived to the present. The survivors are all linked by previous industry experience, good locations, and a focus on quality. The La Bella Pizza & Pasta perhaps provides a case in point of the degree of knowledge and experience required to establish a new and successful entity in the market. Owned and operated by Mario Di Ienno, La Bella, situated in Sandy Bay is a sister shop to one in the Hobart CBD. It sells pizza by the slice and avoids head to head competition with other price-based competitors. Quality is still the driver, as is innovation. Mario was one of the first operators to fully exploit the takeaway nature of the industry when he opened his Pizza Palace in 1977. He was the first local operator to exploit the demand for home delivered pizza, and has previously opened many outlets throughout southern Tasmania.

The last significant change in the operating environment was the introduction of a Goods and Service Tax (GST) in 2000 by the Australian Federal Government. It is unclear to what degree this caused problems to existing operators given that well-established operators have continued through its introduction until the present. For the franchised operators, their market segments are contested through continual product innovation and pricing strategies. At the other end of the market, the passionate pursuit of quality, service, and ambience remain the success factors. The middle ground still remains for wily operators to traverse; getting it right in the middle is not as easy as it was when the market was booming in the late 70s and 80s. Those that have survived the past 30 years in this industry have done so through an ability to exploit their own strengths and through the adoption of different organizational forms and production and marketing processes.

The Outcomes Considered

The organizational form of operators has changed during the last 35 years. Figure 2, Taxonomy of Pizza Operators, highlights the changing nature of the structures employed within the market.

Figure 2 – Taxonomy of Pizza Operators



What is evident from Figure 2 is that three period effects have had a profound effect upon the natural of how pizza operators have organized their operations. The organizational form in the early 1970s was that of a restaurant that allowed for customers to pick up pizza, similar to the practices of the traditional Chinese restaurant. However, the advent of the casino and the *1976 Licensing Act* combined to create different types of customers. One less discerning more interested in the availability of food than on the service or ambience. For them, a diner style operation was suitable. Alternatively, others continued to prefer to unwind in a place that focused upon great food, service and ambience.

The second change in organizational form occurred in the mid 1980s after the arrival of Dial-a-Dino and the commencement of home deliveries. This was quite transformational with the activities of the restaurant and diner changed to facilitate delivery and their boundaries redefined (i.e. their zone of delivery). The third change in organizational form was as a result of the increased price competition introduced by Pizza Haven in 1994 and latter reinforced by Domino’s entry in 1996. Many existing and new entrants chose to compete on the same basis as when the industry first developed, on the basis of quality food, service, and ambience. The delivery of pizza was not continued, but the picking up of pizza has remained. A new organizational form emerged, the shop front pizza outlet. Operated by the franchise chains, it sought not to seat patrons, but merely to produce pizzas for collection or delivery. In between these two sharply contrasting organizational forms are those business types that contest the middle ground. Some even producing pizzas for other competitors on a contract basis. These remaining restaurants and diner style establishments still cater to both pick and delivery.

Conclusion

Perhaps the most interesting factor to arise from consideration of these three distinct periods is the flow of knowledge that has or hasn't occurred. It would seem that during period one (i.e. pre Pizza Hut) strong friendships existed that involved social relationships through which knowledge was shared. The establishment of new pizza restaurants during period two (i.e. post Pizza Hut – pre Pizza Haven) by previous employees and new entrants occurred within a more competitive climate within which knowledge sharing was restricted. Finally, there is little evidence that knowledge has been shared during period three (i.e. post Pizza Haven).

What is clear is that various pizza operators have successfully changed their methods of operation, while others have failed to do so. When they haven't been successful, the operating environment has selected against them. They have however all too some degree introduced variations that have shaped the evolving nature of the industry over the past 35 years. The introduction of such variation has occurred during times when the market has been relatively easy to enter, and during times when it has been extremely difficult to survive within. Essentially, there is evidence that there has been a process of population evolution occurring that was dependent upon the interaction of organisations attempting to replicate new and/or copied activities within the given operating environment.

APPENDIX 6
List of all 24 Sub-Populations

Pizza and,

Asian

Chicken

Italian

Seafood

Indian

Fish & Chips

English

General

Steak

Spanish

French

Kebab

Sandwich

Burgers

Ice Cream

Mexican

Turkish

Coffee & Teas

American

Japanese

Pub Food

Vegetarian

APPENDIX 7

Independent Variables used during SPSS Survival Analysis

A range of variables were used throughout this study. Below, they are presented in the categorories of Nominal, Ordinal, or Scale.

Nominal Variables

Sub-Population (*SubPop*) 1=Asian, 2= Chicken, 3=Italian, 4=Pizza, 5=Seafood, 6=Indian, 7=Fish & Chips, 8=English, 9=Greek, 10=General, 11=Steak, 12=Spanish, 13=French, 14=Kebab, 15=Sandwich, 16=Burgers, 17=Ice Cream, 18=Mexican, 19=Turkish, 20=Coffee & Teas, 21=American, 22=Japanese, 23=Pub Food, 24=Vegetarian.

Firm Type (*Type*) 1=Independent, 2=Franchised.

Town Type (*townTYPE*) 1=Large Towns, 2=Connected Towns, 3=Isolated Towns.

Specialist/Generalist (*SG*) 1=Specialist Take Away, 2=Generalist Take Away / Restaurant, 3=Specialist Restaurant.

Pre Franchise (*Pre*) 1=Pre Franchise, 2=Post 1st Franchise, 3=Post 2nd Franchise.

Main Sub-Populations (*MainSubPop*) 1=Asian, 2=All Other, 3=Pizza, 4=Indian, 5=Fish & Chips.

Selective Neighborhood (*SN*) 1=York, 2=Harrogate, 3=Scarborough, 4=Malton, 5=Pickering, 6=Market Weighton, 7=Pocklington, 8=Selby, 9=Thorne, 10=Goole, 11=Ripon, 12=Knaresborough, 13=Filey, 14=Hornsea, 15=Withernsea, 16=Bridlington, 17=Howden, 18=Driffield, 19=Stamford Bridge, 20=Boroughbridge, 21=Helmsley, 22=Kirkbymoorside, 23=Easingwold (the main 23 towns).

Ordinal Variables

Advertising Spend (*adSPEND*) 1=Heavy Advertising, 2=Light Advertising, 3=No Advertising.

Population Growth (*popGrowth*) 1=Negative to Very Low, 2=Low, 3=Medium to High.

Guild Increase (*guildINCR*) 1=High Growth, 2=Medium Growth, 3=Low Growth.

Resource Availability Decrease (*raD*) 1=Low Level Decrease, 2=Mid Level Decrease, 3=High Level Decrease.

Community Diversity (*Diversity*) 1=Relatively Low Diversity, 2=Medium Diversity, 3=Relatively High Diversity.

Community Advertising >1992 (*COM92*) 1=Very Low Advertising, 2=Low Advertising, 3=High Advertising, 4=Very High Advertising.

Community Advertising >2000 (*COM00*) 1=Very Low Advertising, 2=Low Advertising, 3=High Advertising, 4=Very High Advertising.

Scale Variables

Advertising Spend (*adINDEX*), average advertising spend per firm.

Years (*Years*), total years each firm participates during the study period.

Dominance
Shannons
Simpsons
Evenness
Menhinick A range of Diversity indices.
Margalef
Equitability
FisherA
BergerA

Distance to Large Town (*Distance*), the distance of each firm to the (next) closest town.

APPENDIX 8

UK Dataset Characteristics

North Yorkshire / East Riding Data Set 1975 to 2004

Macro Level

	Overall	Total
Pizza Firms	183	183
All Firms	2440	2440

Meso Level

	Large Towns	Connected Towns	Isolated Towns	Total
Pizza Firms	119	26	31	176
All Firms	1528	342	419	2289

Micro Level

	Town 1 ...	2 ...	3 ...	4 ...	5 ...	6 ...	7 ...	8 ...	9 ...	10 ...	11 ...	12 ...	13 ...	14 ...	15 ...	16 ...	17 ...	18 ...	19 ...	20 ...	21 ...	22 ...	23	Total
Pizza Firms	60	27	22	5	10	4	6	1	3	1	5	1	8	4	4	1	1	1	4	2	2	1	3	176
All Firms	615	375	332	97	206	39	67	13	36	28	49	29	78	52	64	13	12	36	43	32	22	23	28	2289

APPENDIX 9

Example of Informal Interview Transcript

Date: June 2006

Conversation with an employee of a local Harrogate business who lives in Weatherby confirmed the suspicion of that such consumers do indeed spend monies on food and entertainment outside there place of residence. In this case, it was noted as most common to travel to either of the cities; Leeds, Harrogate or York, to dine out. A lack of local eating houses in Weatherby was cited as the main reason for eating elsewhere. Also noted was the fact that once you are committed to traveling to and from work each day it increases the likelihood of such 'local' dollars being spent elsewhere.

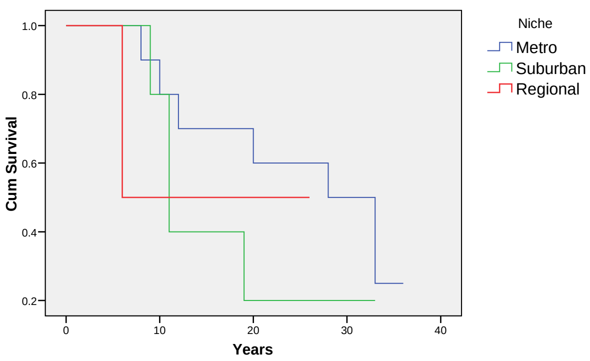
This observation is inline with other such remarks, and is consisitent with the owner of the Tico Tico restaurant in Knaresborough who commented on the challenge of attracting the custom of local residents (many of whom work in York or Harrogate).

APPENDIX 10

Survival Across Time and Space

Survival Function

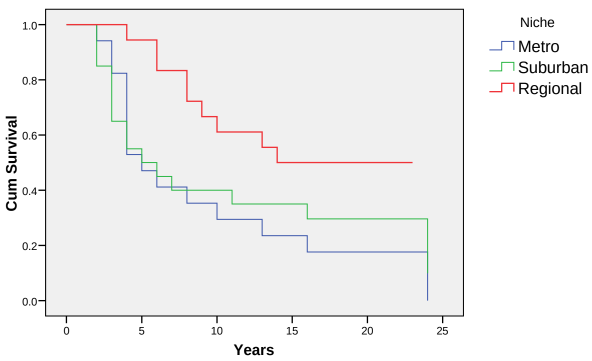
Hobart Pizza - Pre Franchise



Summary: Over time, a survival advantage is seen to occur for those pizza shops located in regional areas, relative to those operating in suburban and metropolitan areas.

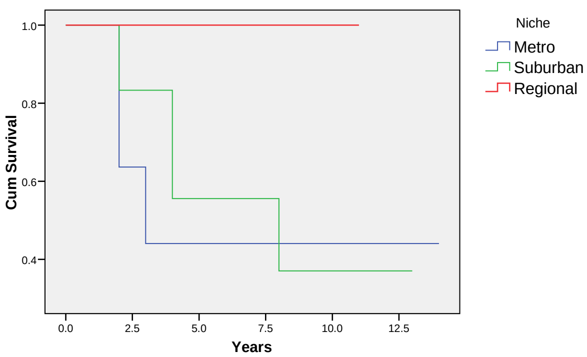
Survival Function

Hobart Pizza - Post 1st Franchise

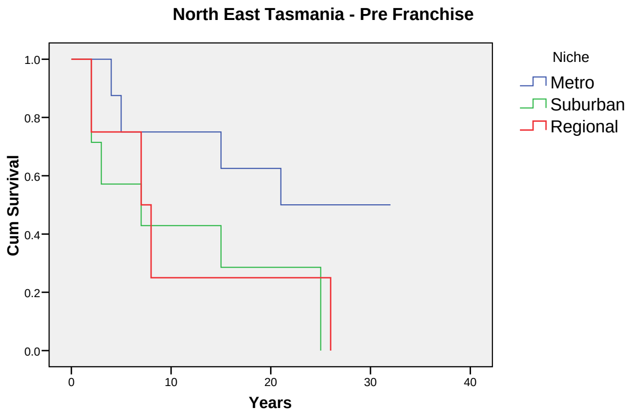


Survival Function

Hobart Pizza - Post 2nd Franchise

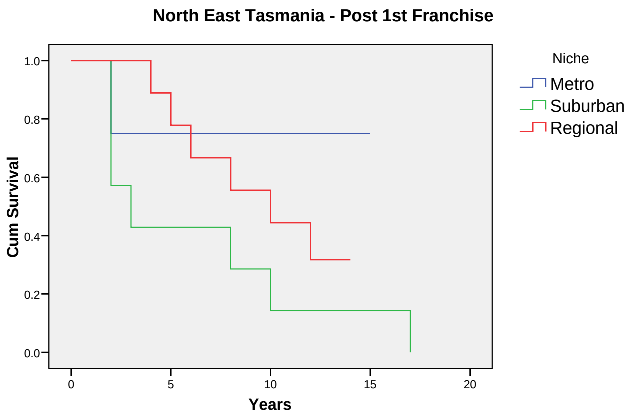


Survival Function

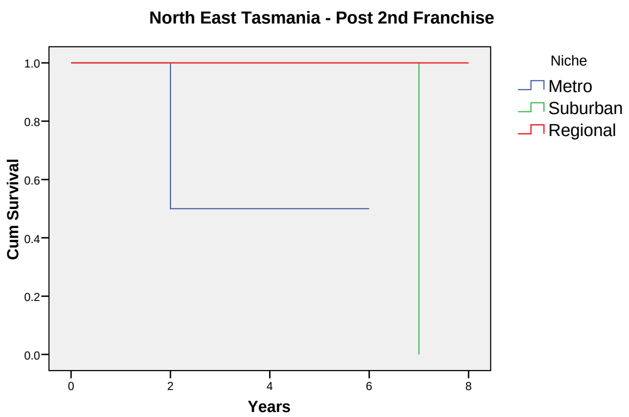


Summary: Over time, a survival advantage is seen to occur for those pizza shops located in regional (and/or suburban) areas, relative to those operating in metropolitan areas.

Survival Function

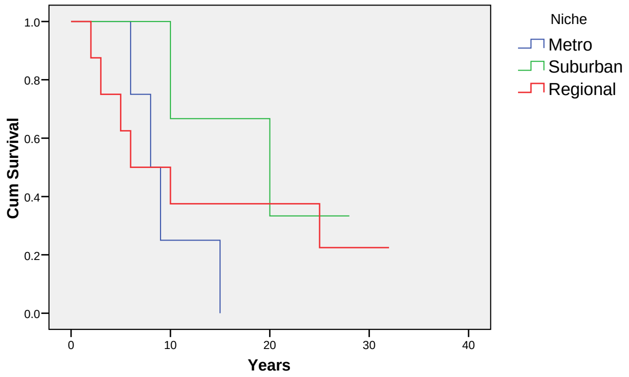


Survival Function



Survival Function

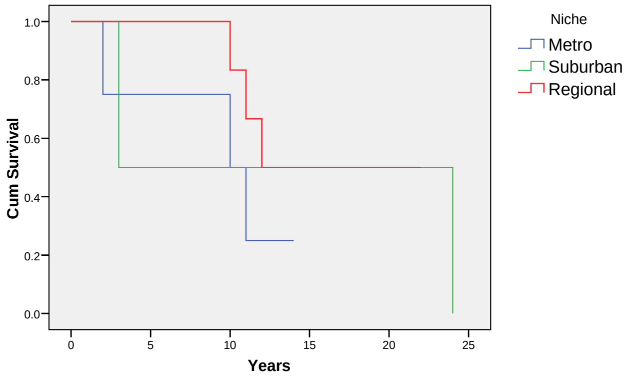
North West Tasmania - Pre Franchise



Summary: Over time, a survival advantage is seen to occur for those pizza shops located in regional areas, relative to those operating in metropolitan areas.

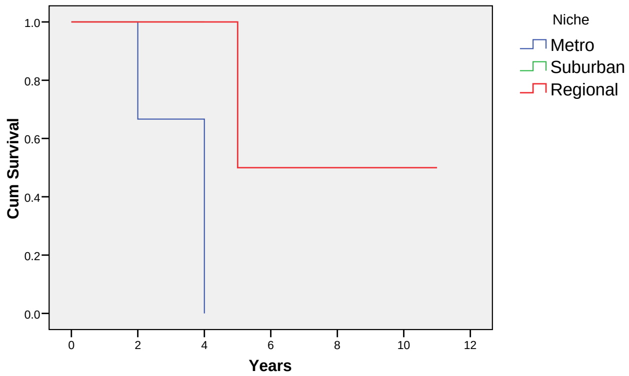
Survival Function

North West Tasmania - Post 1st Franchise



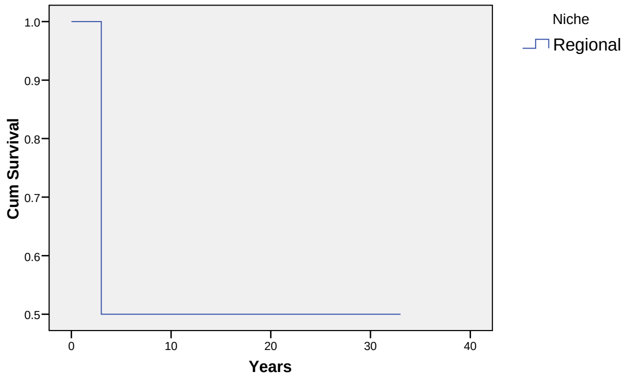
Survival Function

North West Tasmania - Post 2nd Franchise



Survival Function

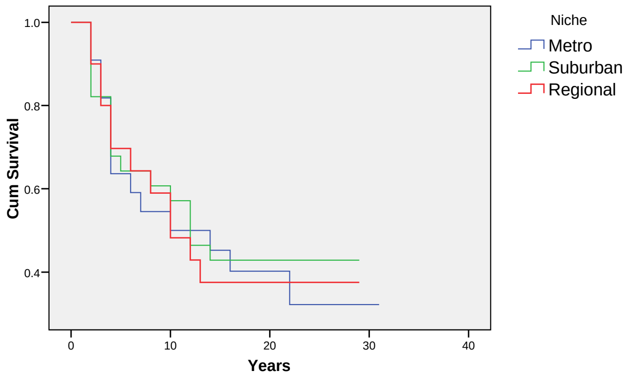
Geelong - Pre Franchise



Summary: Over time, a survival advantage is seen to occur for those pizza shops located in regional areas, relative to those operating in suburban and metropolitan areas.

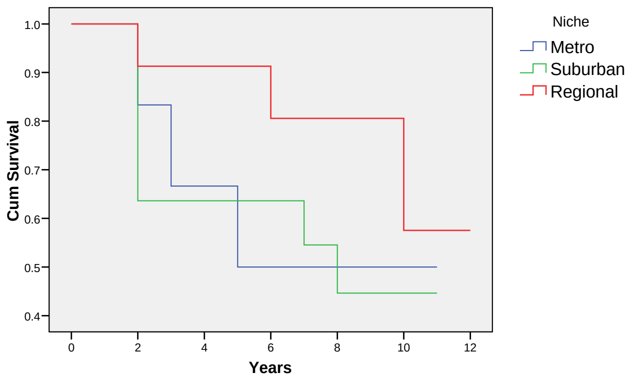
Survival Function

Geelong - Post 1st Franchise



Survival Function

Geelong - Post 2nd Franchise



APPENDIX 11

North Yorkshire / East Riding Towns

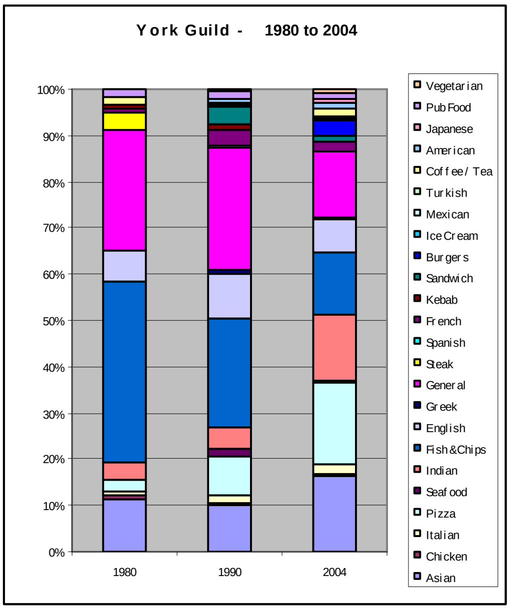
York	1	Hunmanby	25	Hovingham	49	Leven	73
Harrogate	2	Hornsea	26	Whitwell	50	Elvington	74
Scarborough	3	Skipsea	27	Bishop Mokton	51	Alne	75
Patrington	4	Pickering	28	Escrick	52	Sheriff Hutton	76
Goole	5	Bubwith	29	Shurburn	53	Burton Leonard	77
Bridlington	6	Tockwith	30	Tockwith	54	Ravenscar	78
Thorne	7	Copgrove	31	Nanburn	55	Wenslydale	79
Ripon	8	Snaith	32	Thirsk	56	Cowthorpe	80
Seamer	9	Cloughton	33	Wiggington	57	Whixley	81
Stamford Bridge	10	Snaiton	34	Appleton Roebuck	58	Burythorpe	82
Howden	11	Coxwold	35	Wilberfoss	59	Hazlewood	83
Filey	12	Thorton dale	36	Lastingham	60	Markington	84
Malton	13	Holme	37	Burn	61	Rawcliffe	85
Aldborough	14	Nunnington	38	Green Hammerton	62		
Boroughbridge	15	Camblesforth	39	Melmerby	63		
Selby	16	Kirby Malzeard	40	Brandsby	64		
Knaresborough	17	Easingwold	41	Sawdon	65		
Driffield	18	Ampleforth	42	South Milford	66		
Helmsley	19	Masham	43	Helperby	67		
Kirbymoorside	20	Mkt Weighton	44	Ricall	68		
Withersea	21	Pocklington	45	Cawood	69		
Pateley Bridge	22	Linton on Ouse	46	Tollerton	70		
Flamboro	23	North Allerton	47	Coneythorpe	71		
Darley	24	Flaxton Moor	48	Leyburn	72		

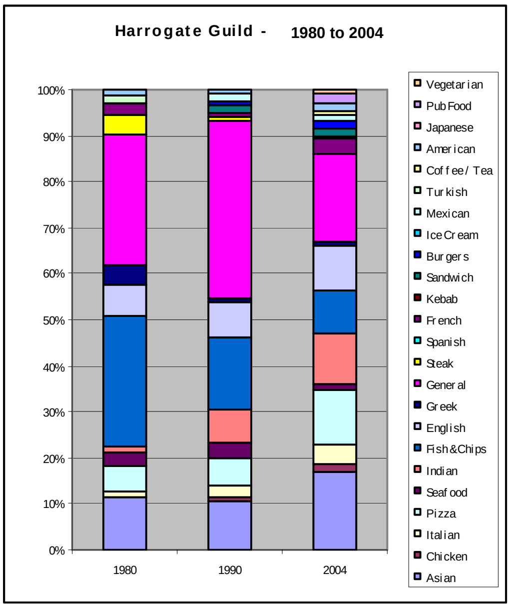
Core 23 Towns

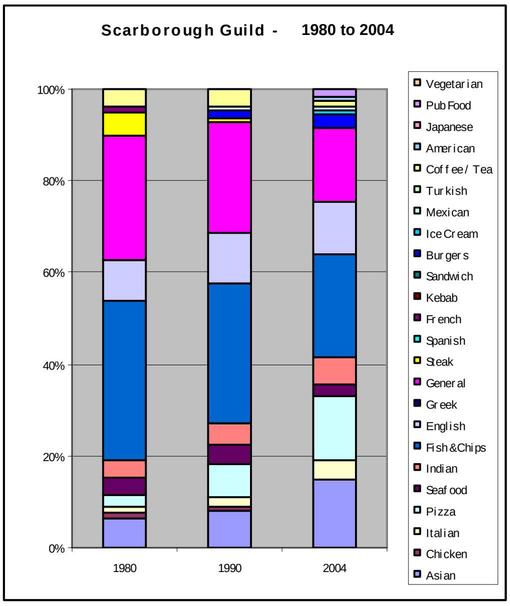
Excluded Towns

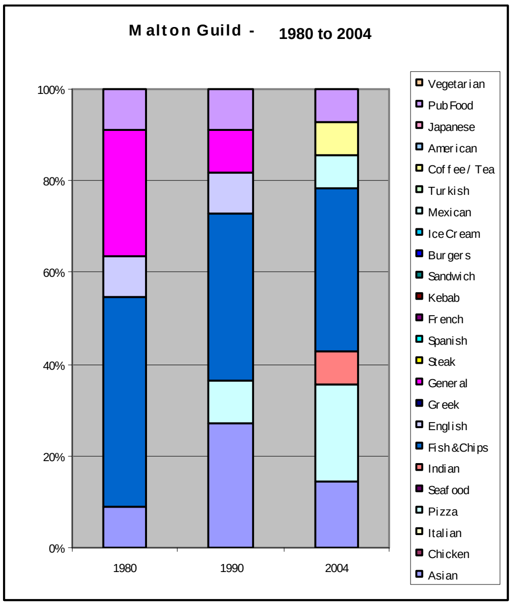
APPENDIX 12

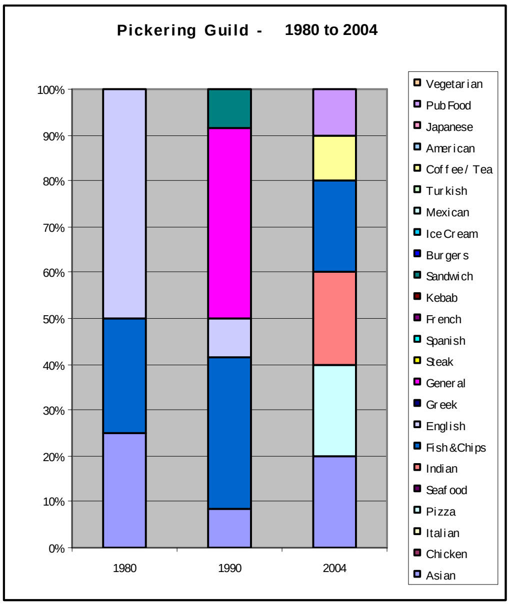
Guild Composition over Time

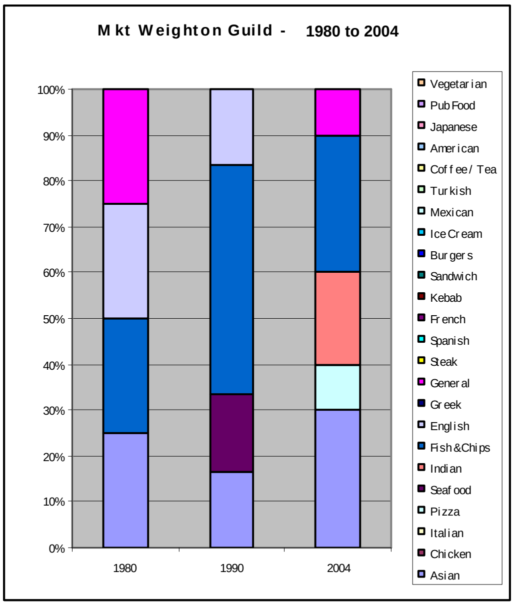


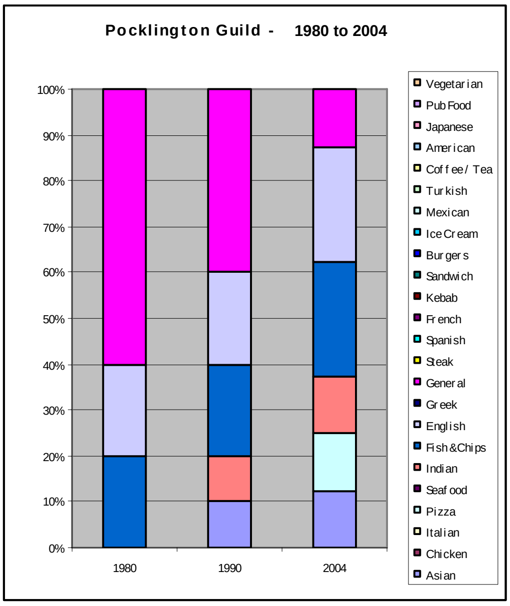


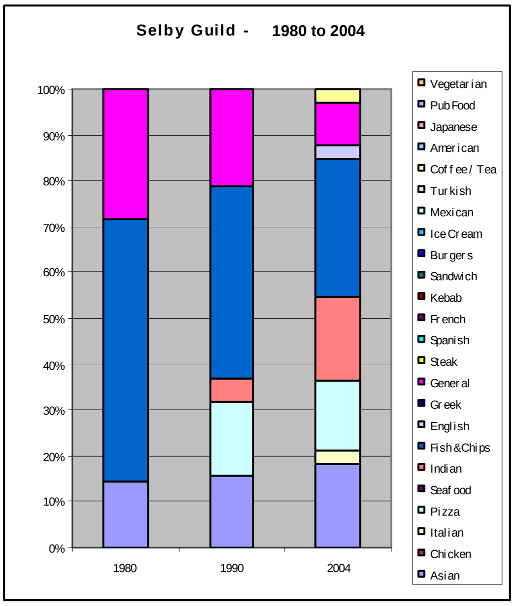


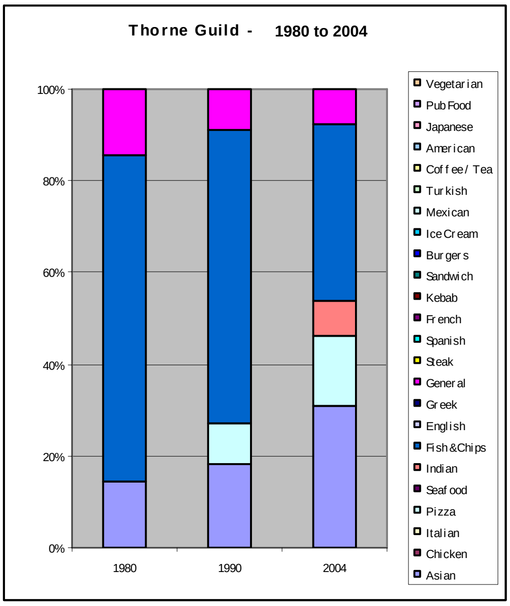


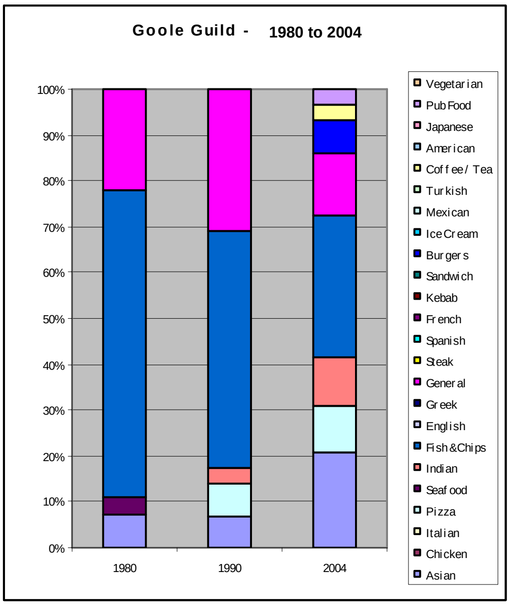

Pickering Guild - 1980 to 2004
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee/ Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

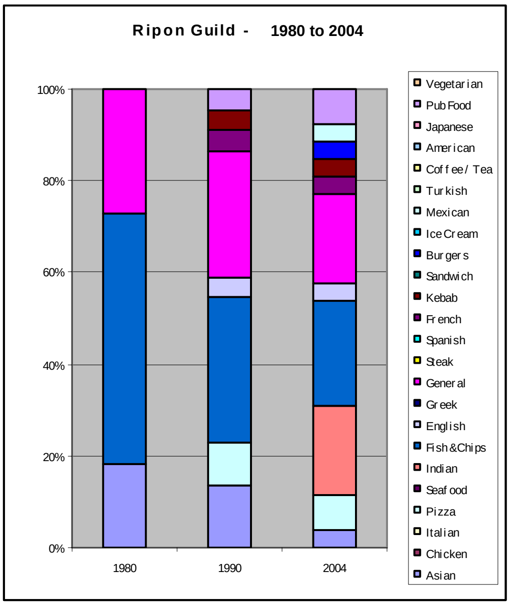

Mkt Weighton Guild - 1980 to 2004
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee/ Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

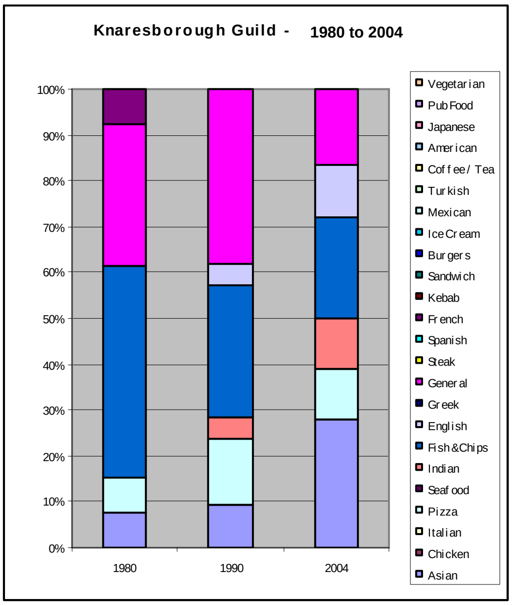

Pocklington Guild - 1980 to 2004
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee/ Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

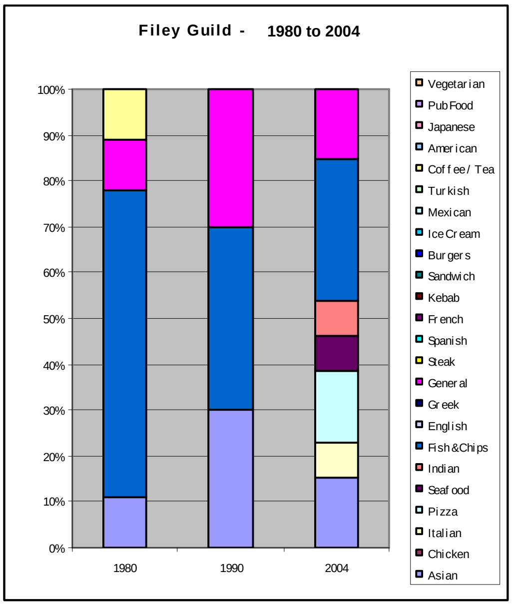

Selby Guild - 1980 to 2004
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee/ Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

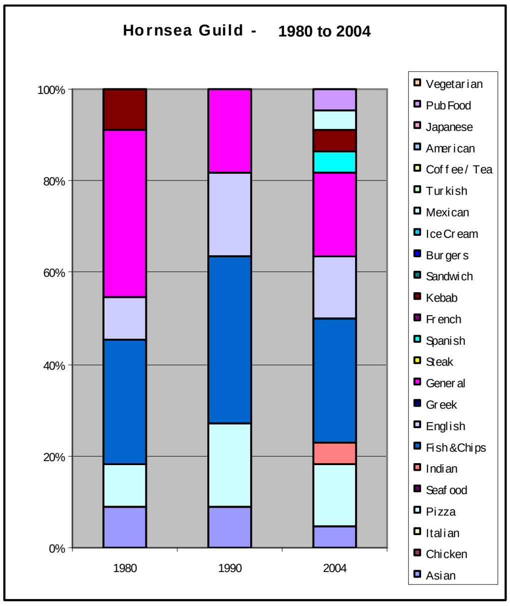

Thorne Guild - 1980 to 2004
100%
80%
60%
40%
20%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee/ Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

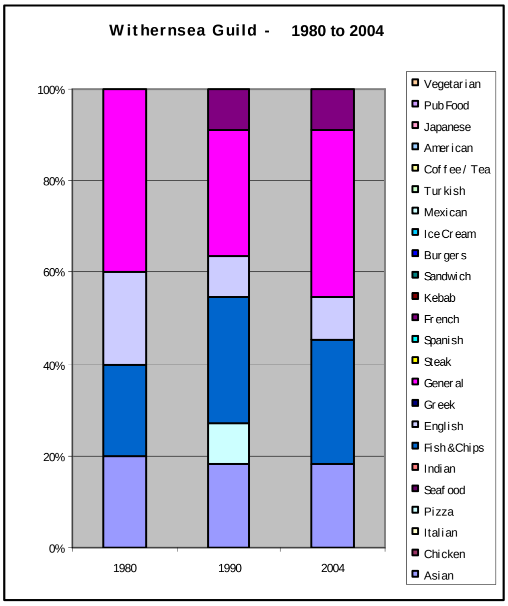

Goole Guild - 1980 to 2004
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee/ Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

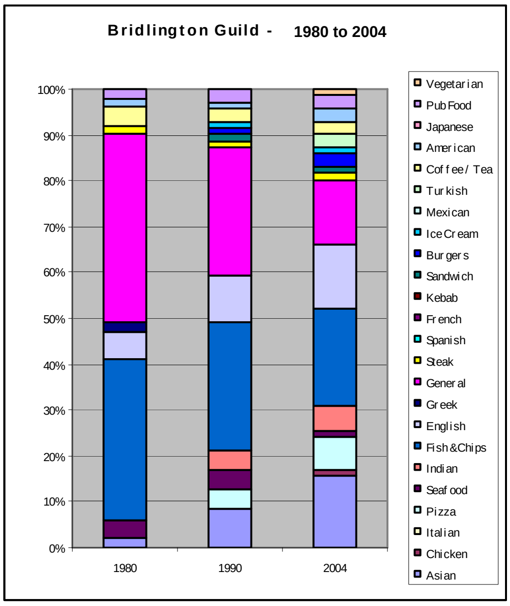

Ripon Guild - 1980 to 2004
100%
80%
60%
40%
20%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee/ Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

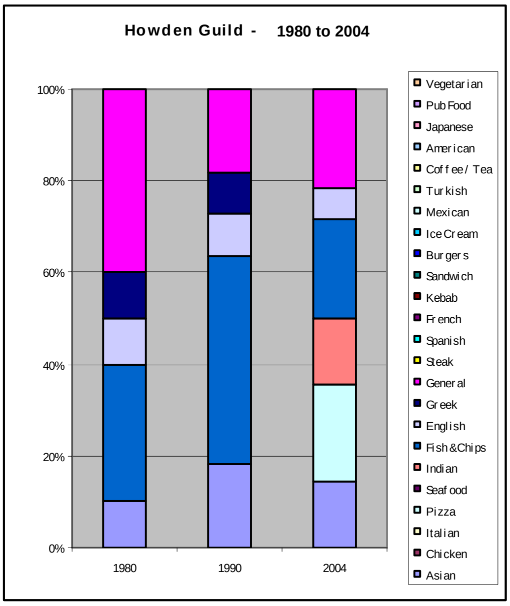

Knaresborough Guild - 1980 to 2004
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee/ Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

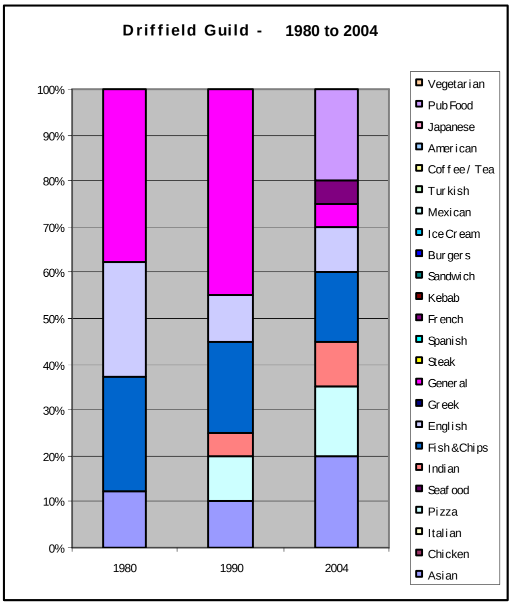

Filey Guild - 1980 to 2004
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee / Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

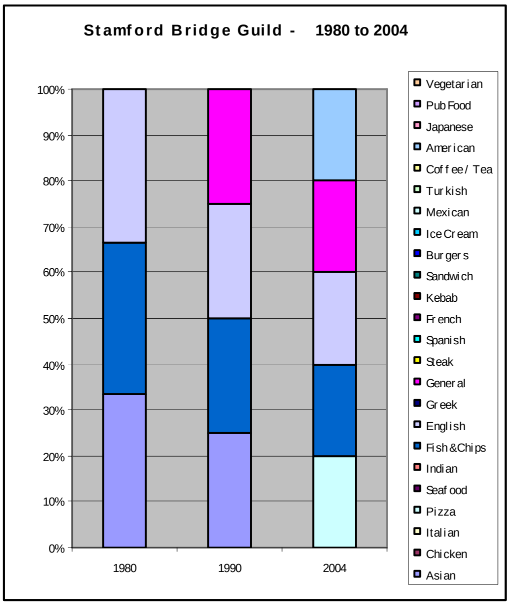

Hornsea Guild - 1980 to 2004
100%
80%
60%
40%
20%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee / Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

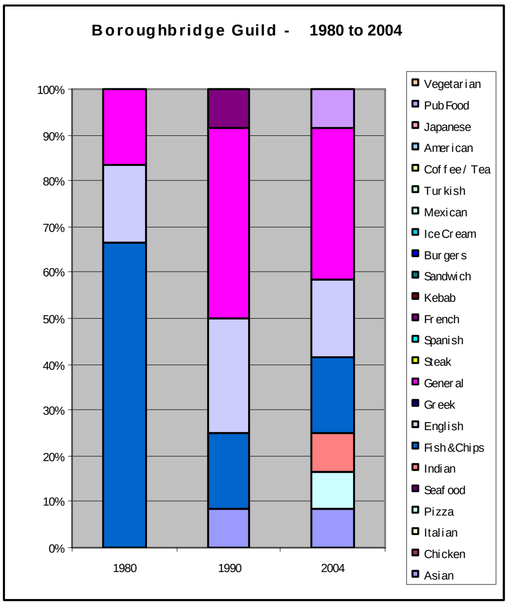

Withernsea Guild - 1980 to 2004
100%
80%
60%
40%
20%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee / Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

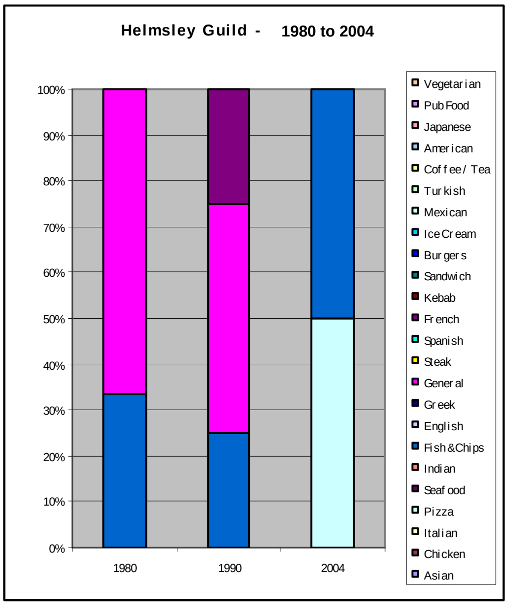

Bridlington Guild - 1980 to 2004
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee / Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

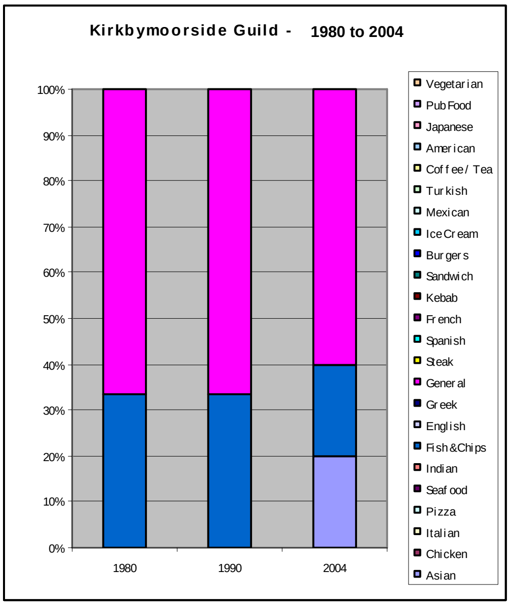

Howden Guild - 1980 to 2004
100%
80%
60%
40%
20%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee/ Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

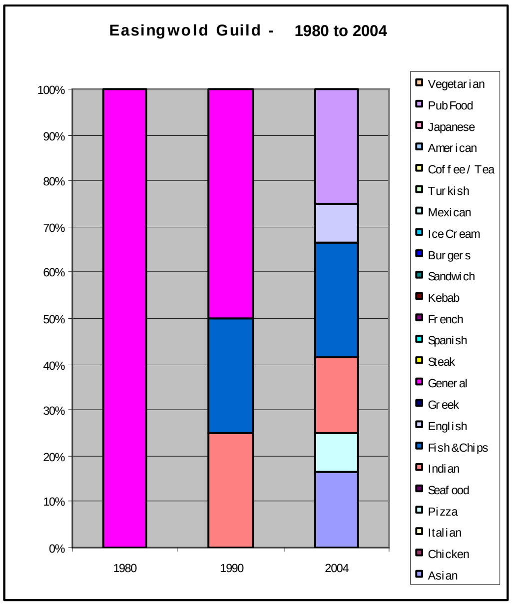

Driffield Guild - 1980 to 2004
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee/ Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian


Stamford Bridge Guild - 1980 to 2004
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee/ Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian


Boroughbridge Guild - 1980 to 2004
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee/ Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

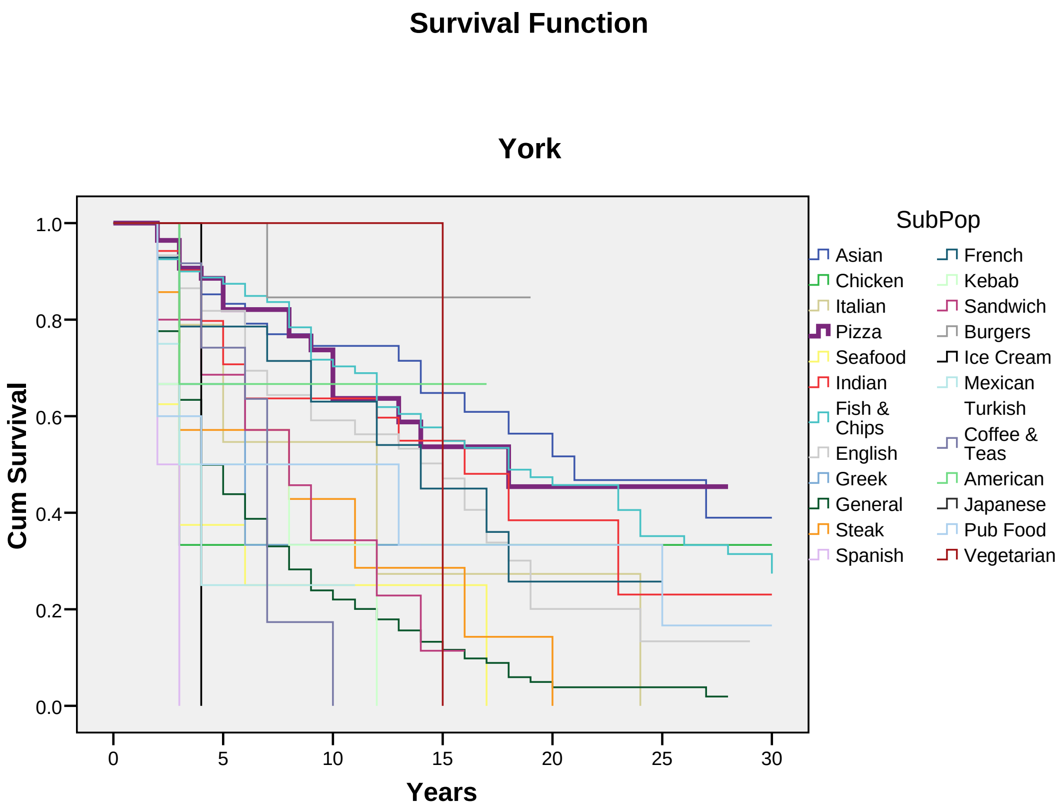

Helmsley Guild - 1980 to 2004
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee/ Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian


Kirkbymoorside Guild - 1980 to 2004
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee/ Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

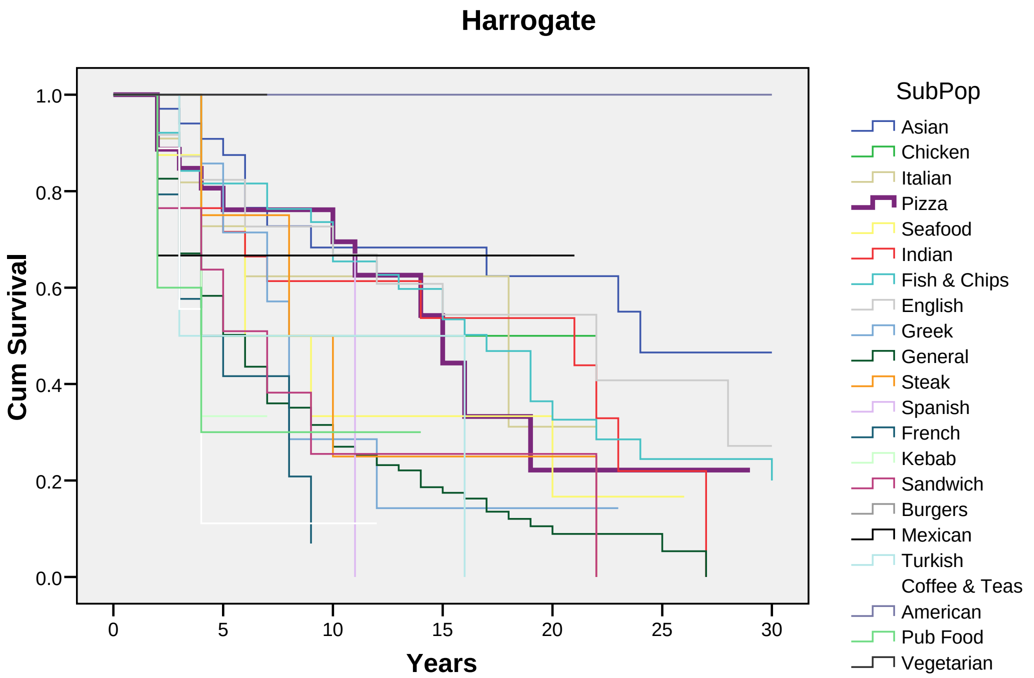

Easingwold Guild - 1980 to 2004
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
1980
1990
2004
Vegetarian
Pub Food
Japanese
American
Coffee/ Tea
Turkish
Mexican
Ice Cream
Burgers
Sandwich
Kebab
French
Spanish
Steak
General
Greek
English
Fish&Chips
Indian
Seafood
Pizza
Italian
Chicken
Asian

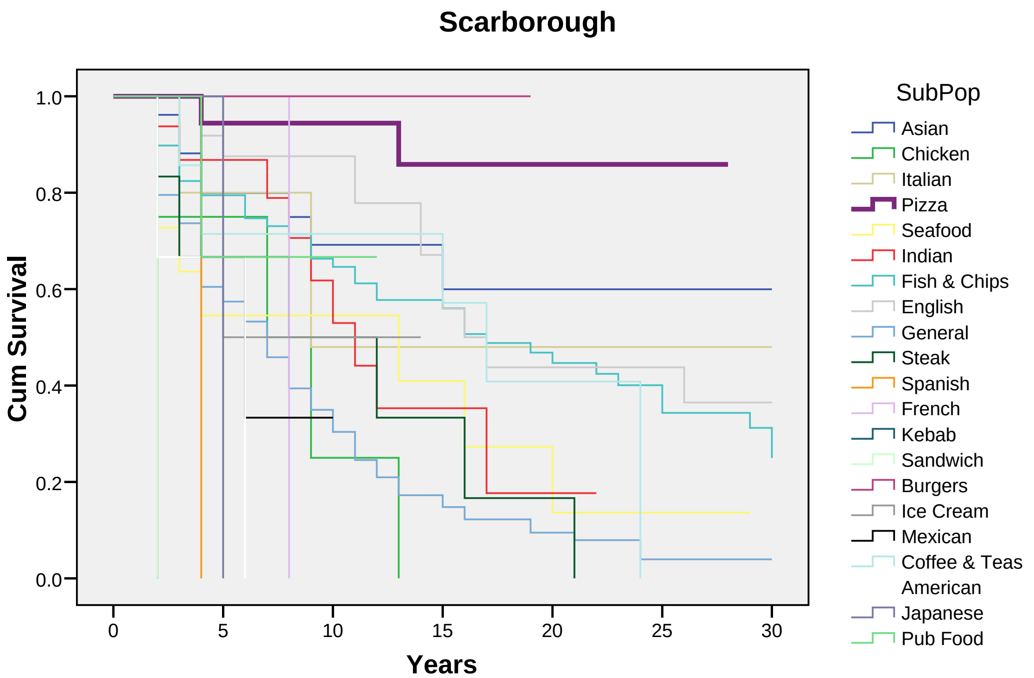
APPENDIX 13

Guild Survival across Main 23 Towns

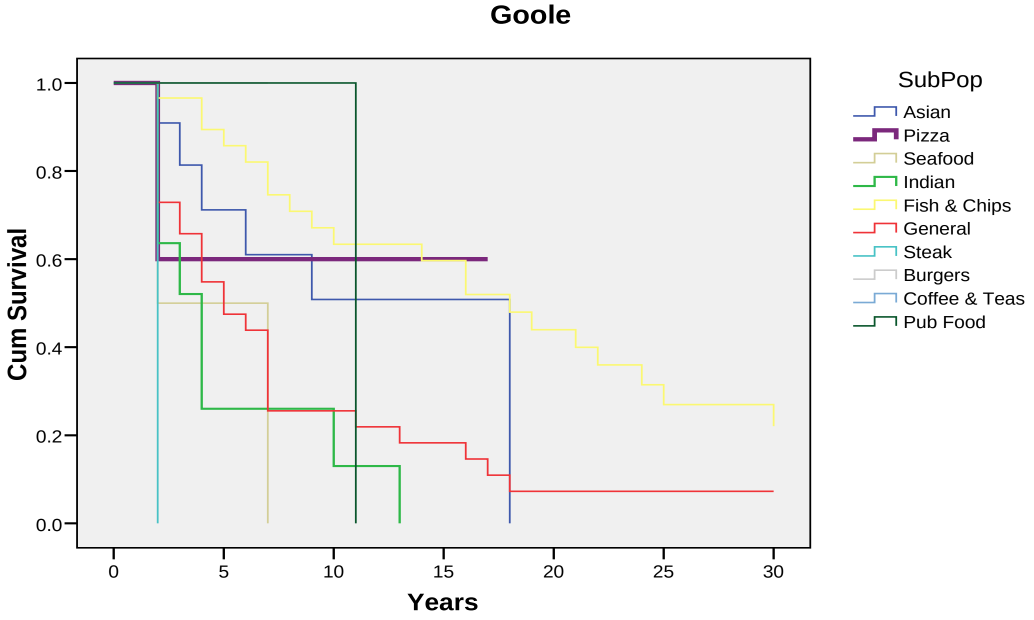


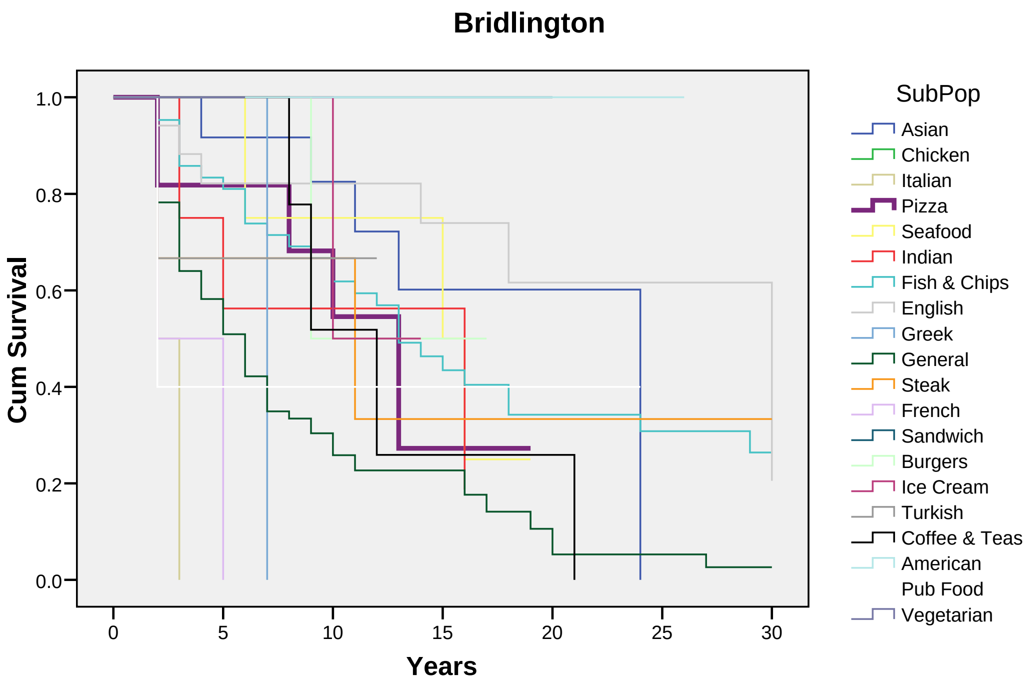
Survival Function





Survival Function





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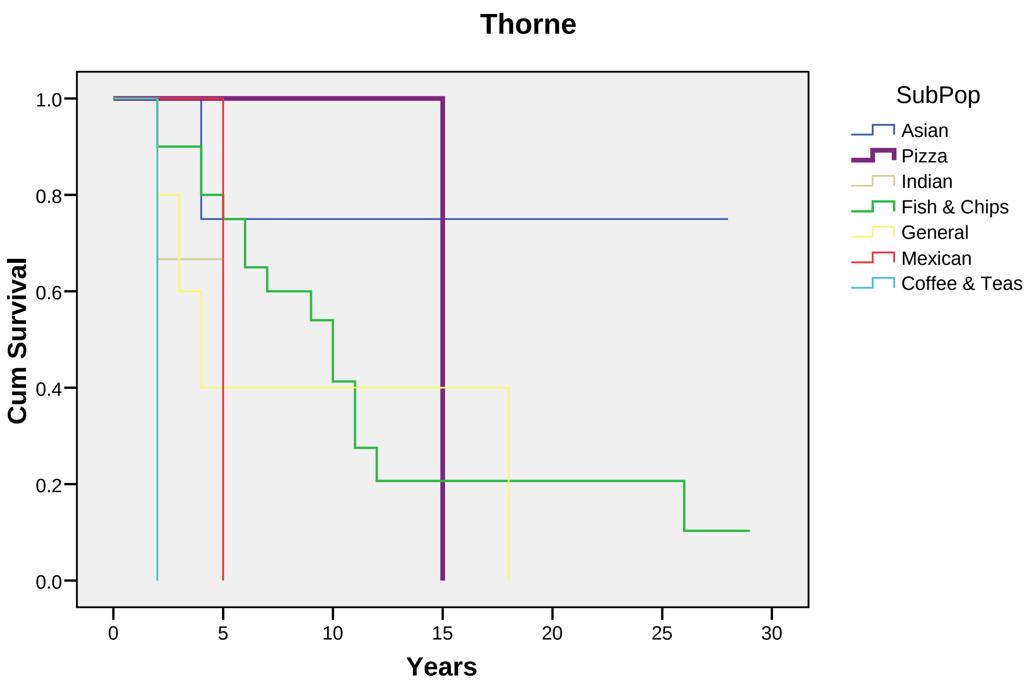
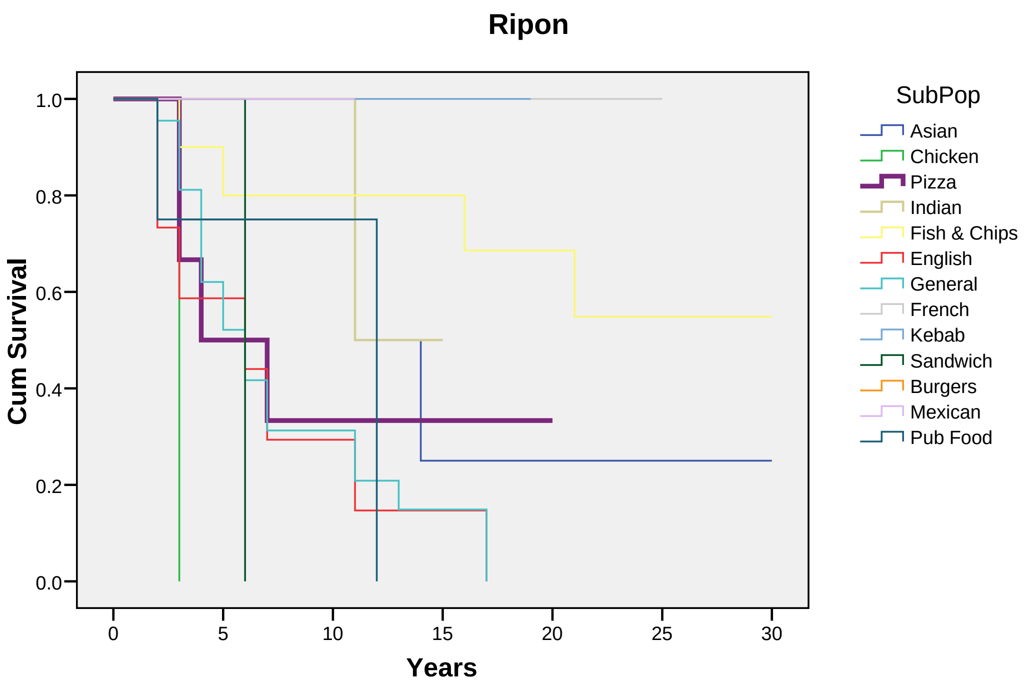
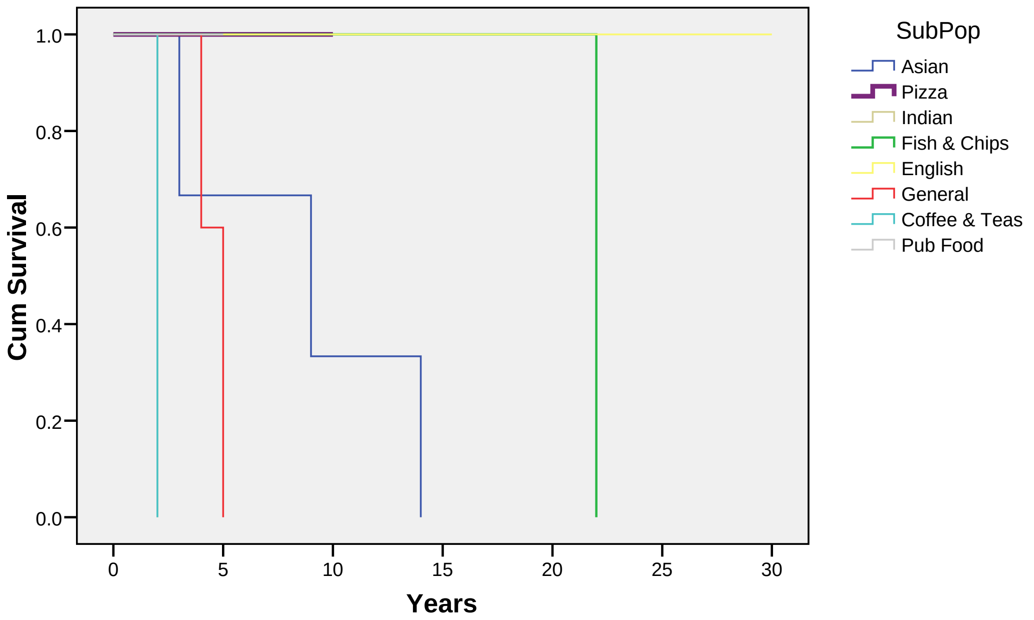


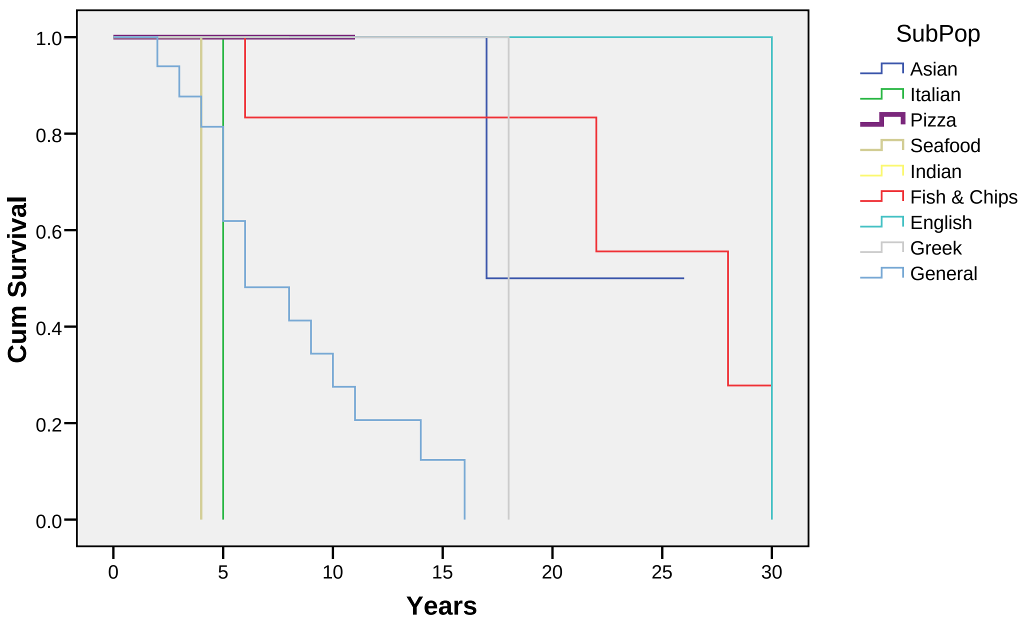


Survival Function

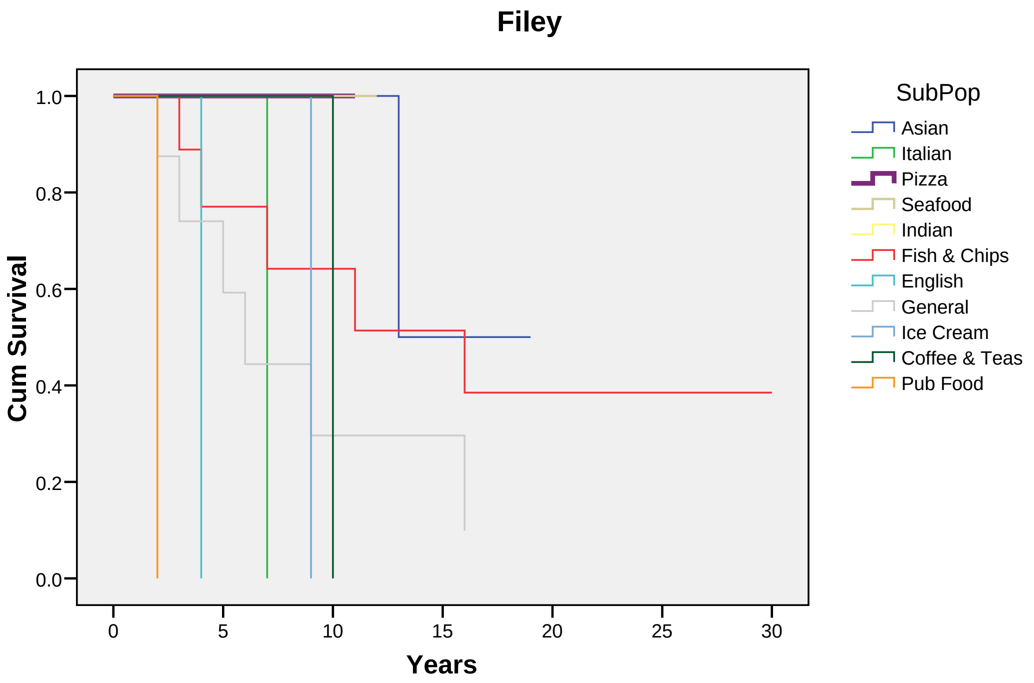
Stamford Bridge

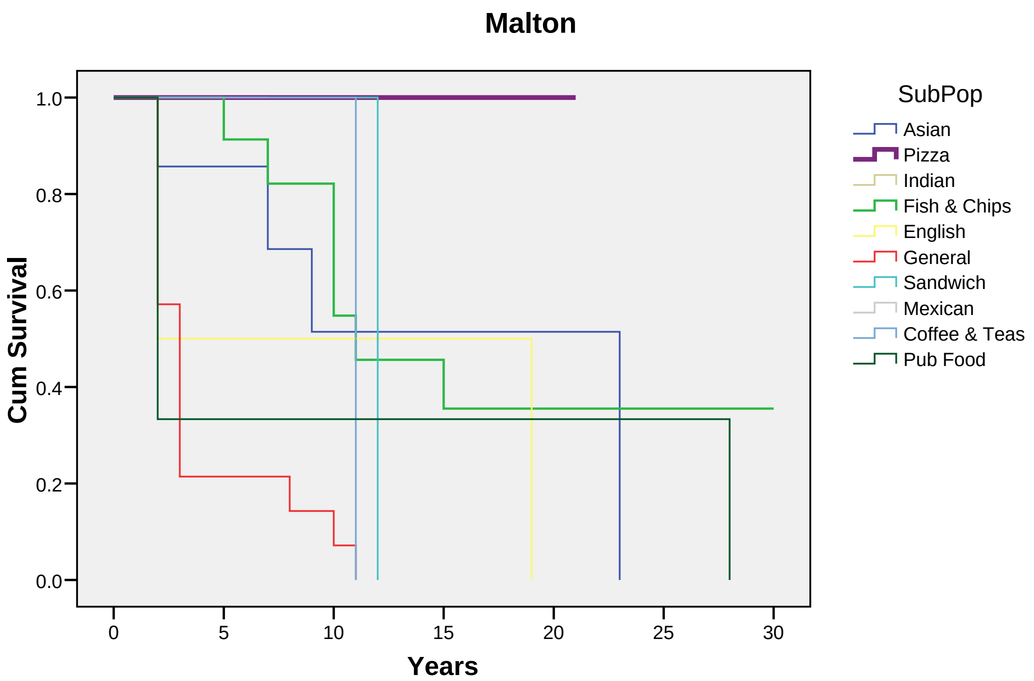


Howden



Survival Function





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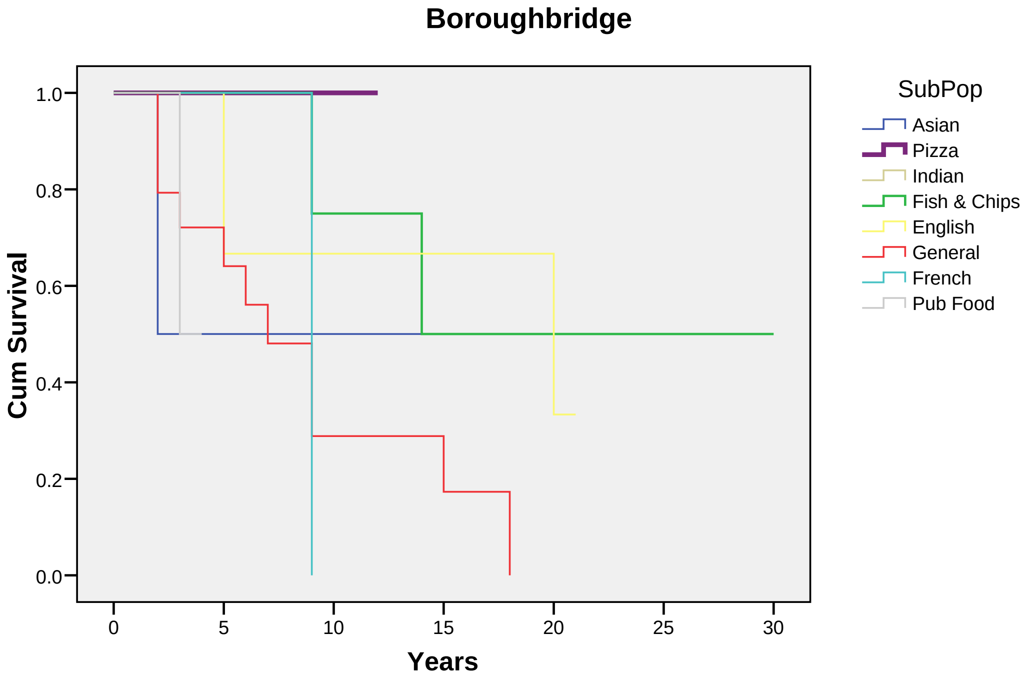
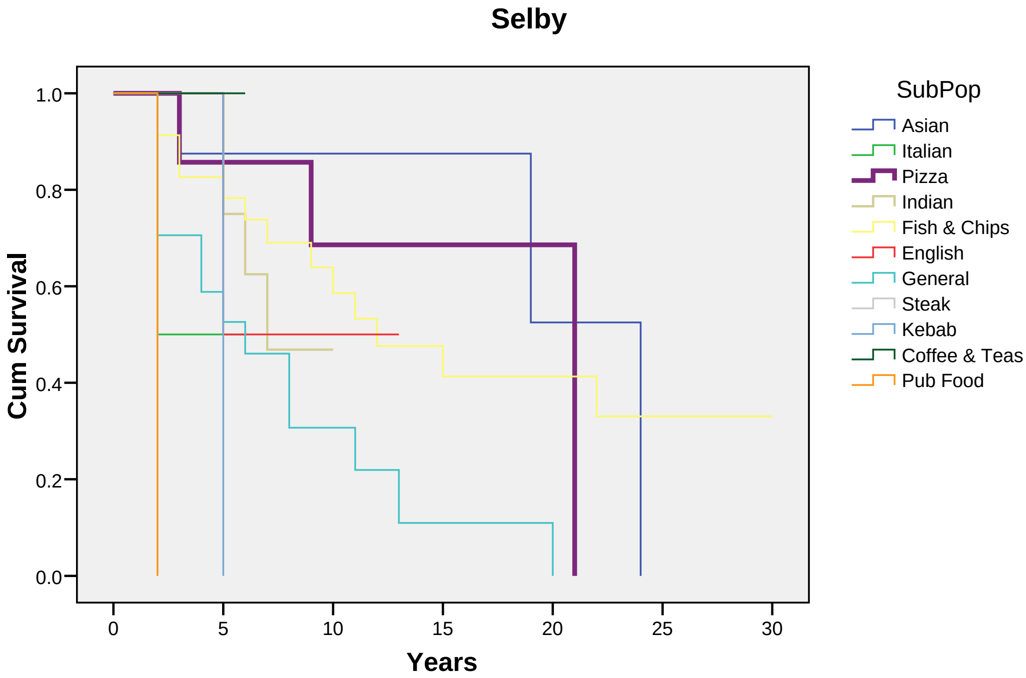
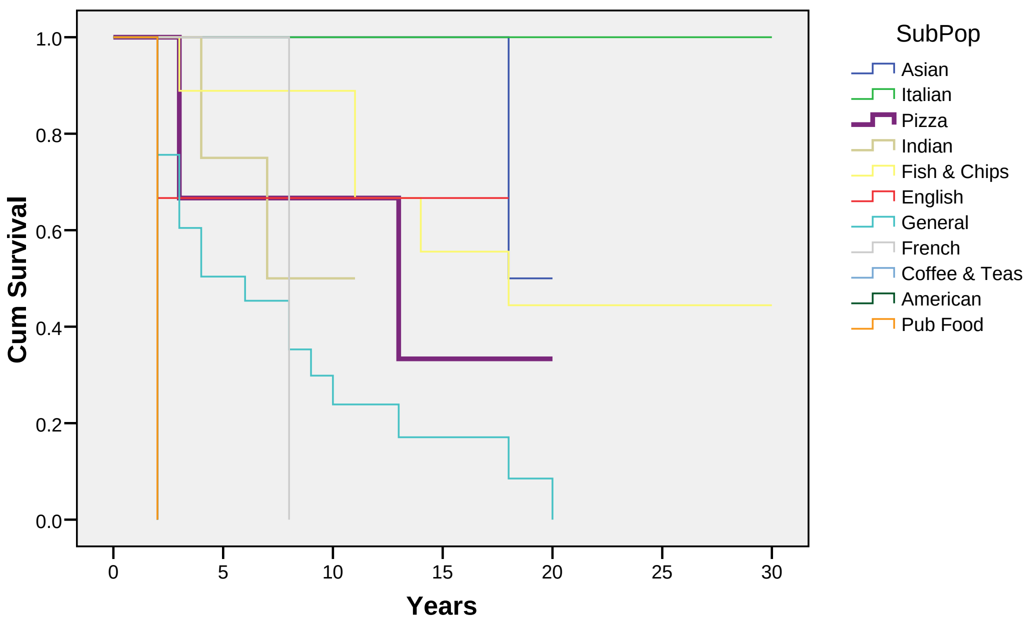


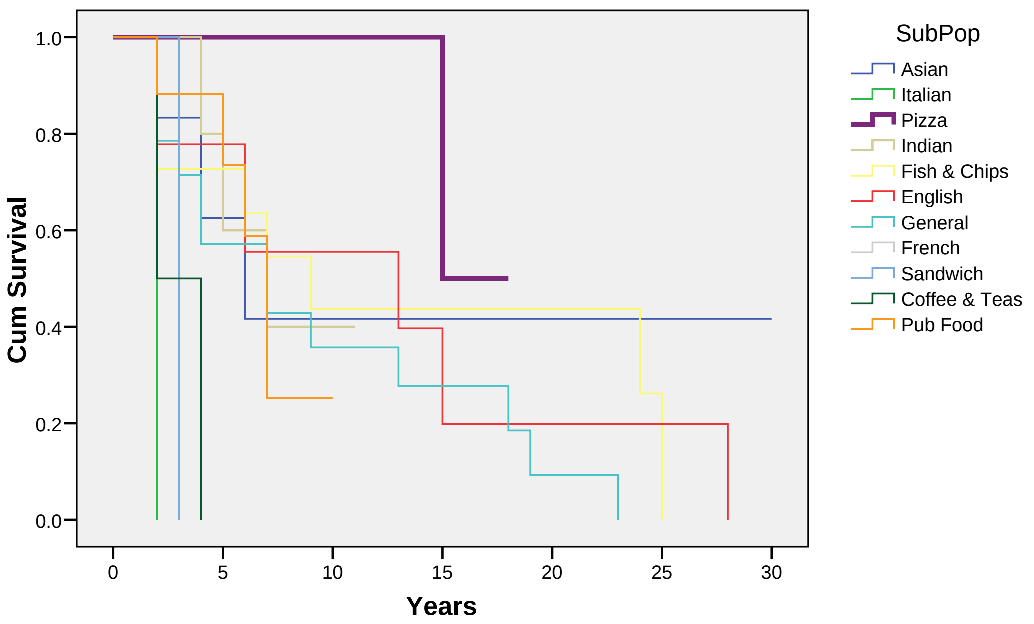


Survival Function

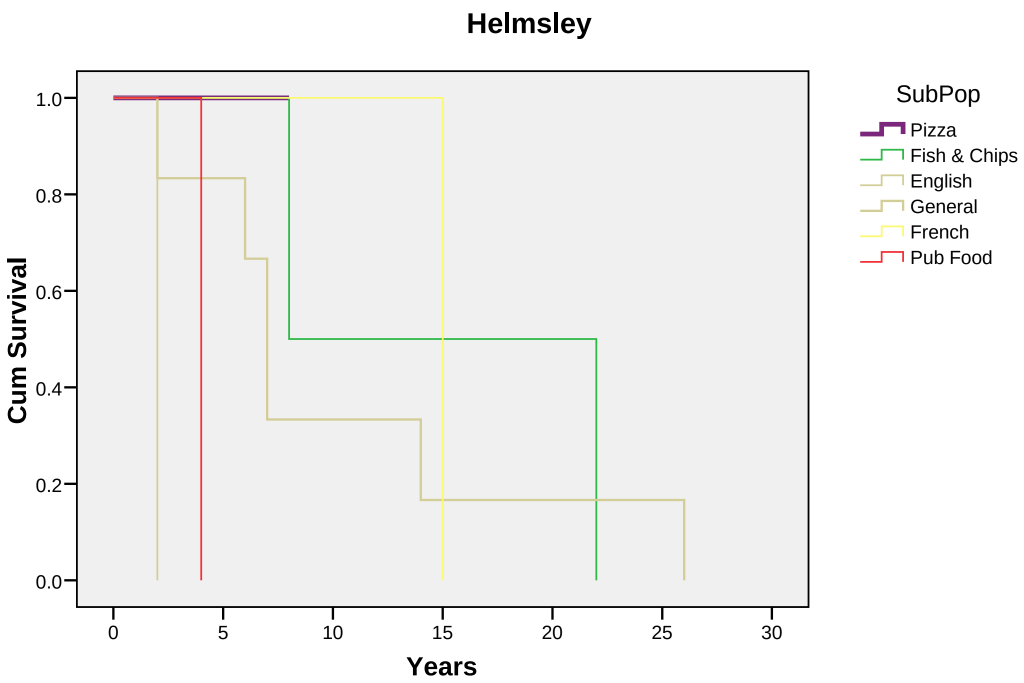
Knaresborough

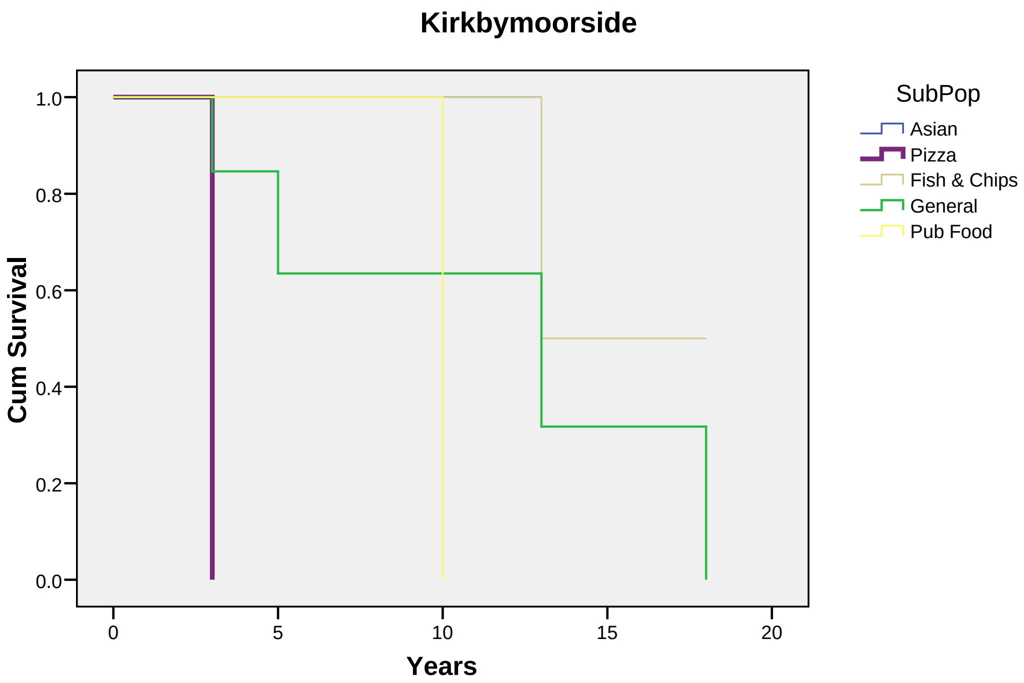


Driffield



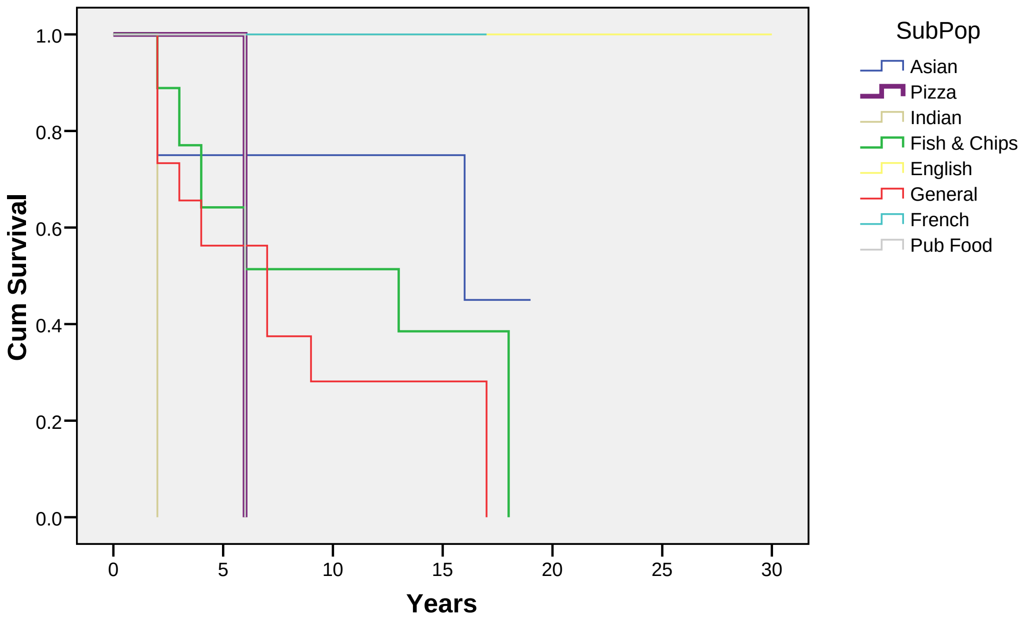
Survival Function



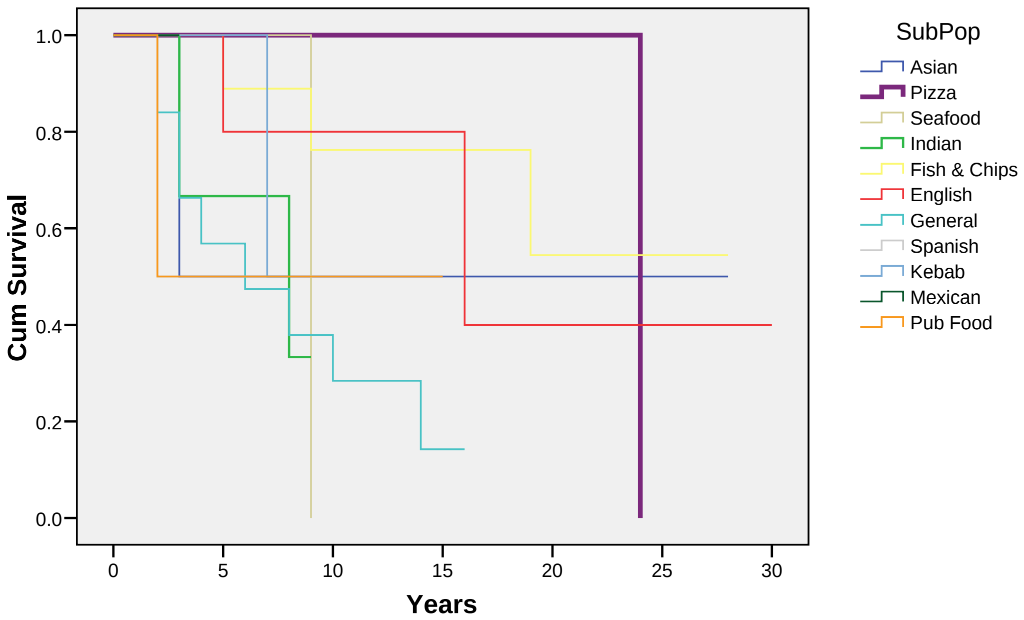


Survival Function

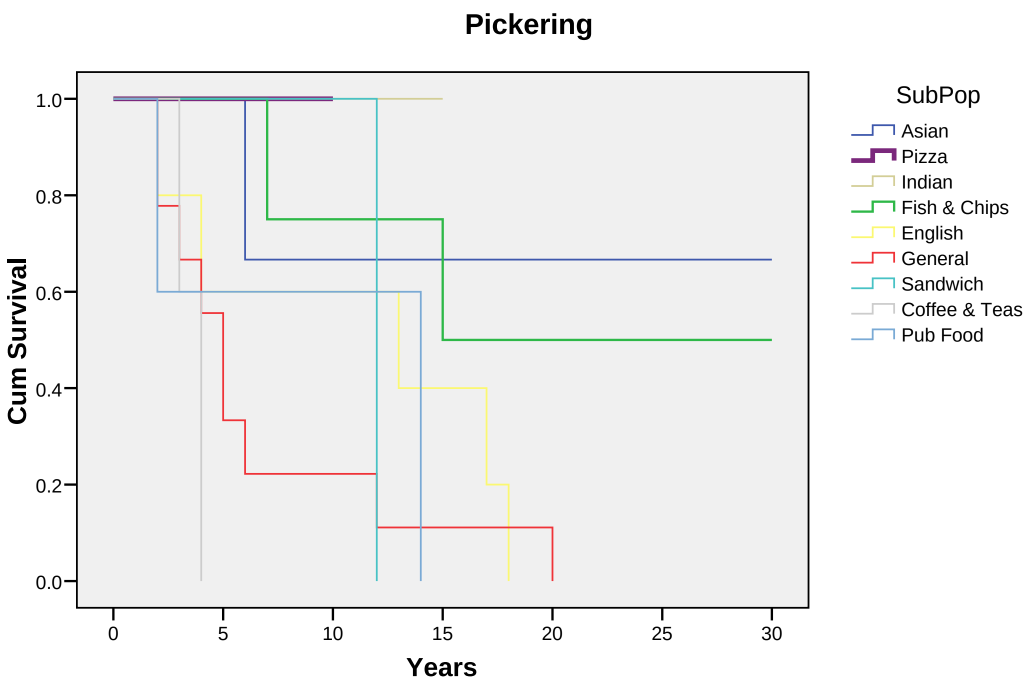
Withersea

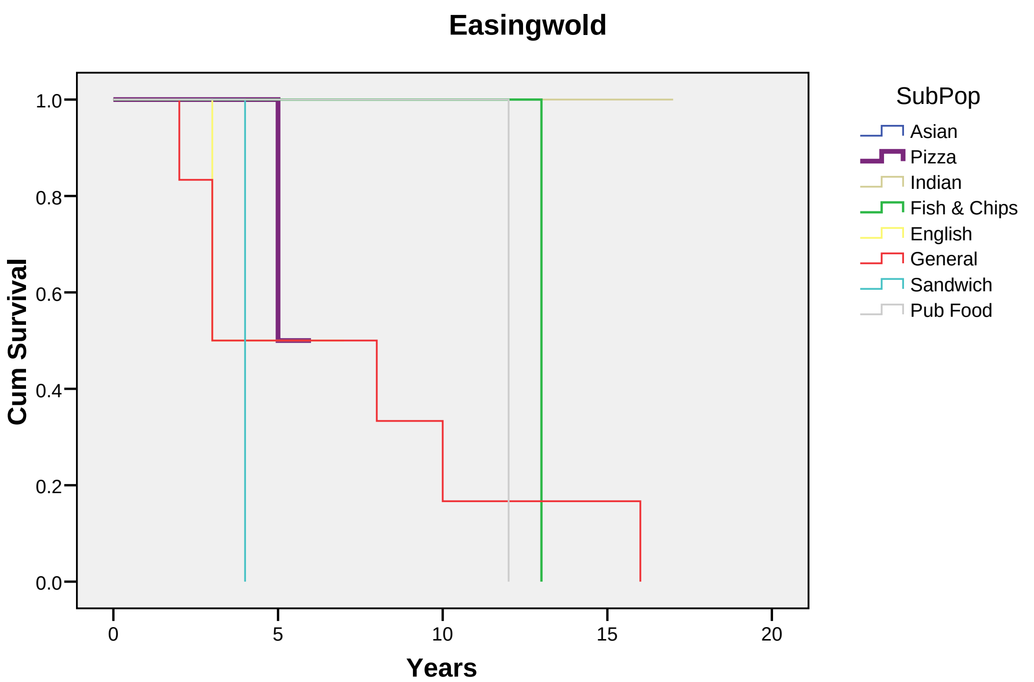


Hornsea

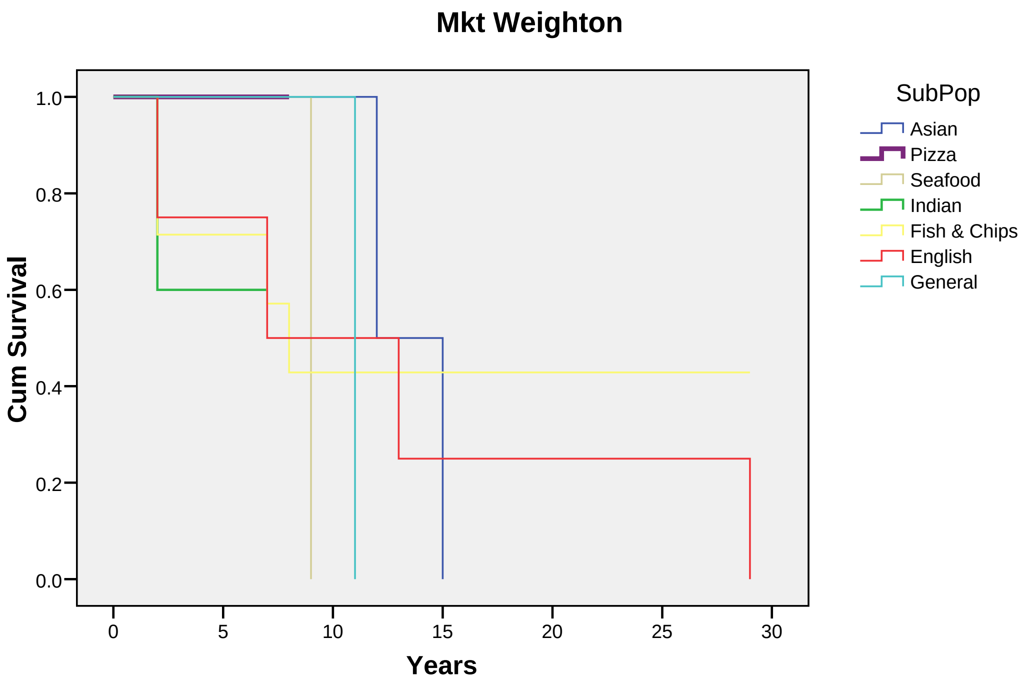


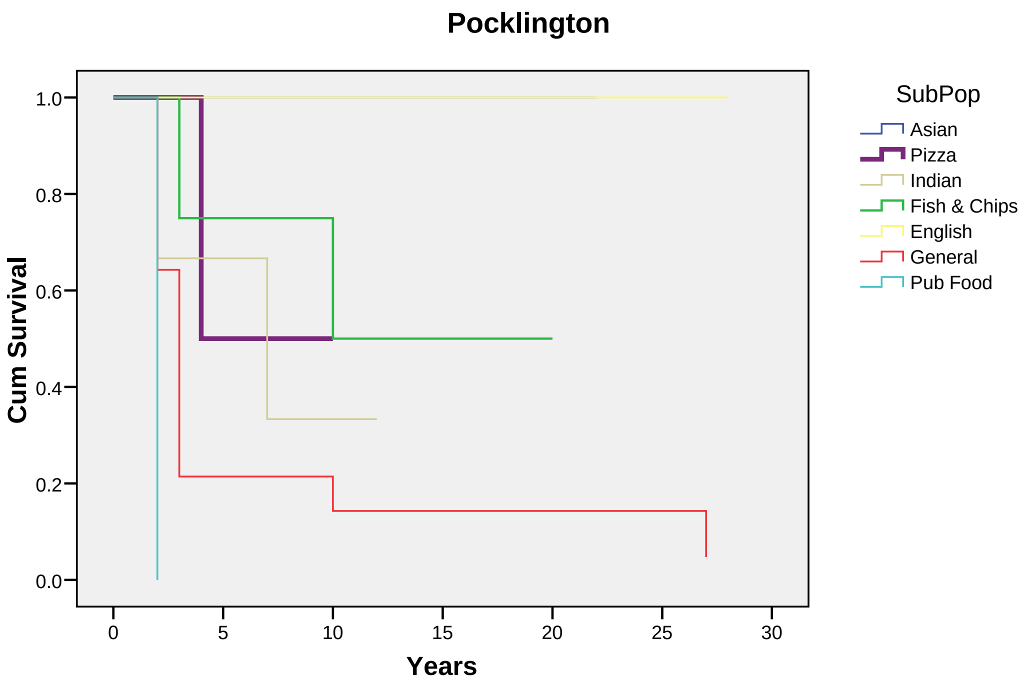
Survival Function





Survival Function





APPENDIX 14

Community Similarity Index – 1975, 1990 and 2004

1975

	York	Harr	Scar	Thorne	Knare	Goole	Brid	Malton	Selby	Helmsley	Ripon	Driffield	Pock	Withern	Picker	Kirkby	Filey	Mkt W	Hornsea	Easing	Stam.	Howden	Borough
York		0.60	0.77	0.18	0.36	0.27	0.50	0.45	0.27	0.09	0.36	0.36	0.00	0.36	0.27	0.18	0.36	0.09	0.27	0.09	0.27	0.27	0.27
Harrogate	0.60		0.50	0.17	0.31	0.25	0.50	0.31	0.25	0.08	0.33	0.33	0.00	0.33	0.25	0.17	0.33	0.08	0.29	0.08	0.25	0.25	0.25
Scarborough	0.77	0.50		0.17	0.31	0.25	0.46	0.41	0.25	0.08	0.33	0.33	0.00	0.33	0.25	0.17	0.33	0.08	0.46	0.08	0.25	0.25	0.25
Thorne	0.18	0.17	0.17		0.40	0.66	0.33	0.40	0.66	0.50	0.50	0.50	0.00	0.50	0.66	0.33	0.50	0.00	0.33	0.00	0.66	0.25	0.25
Knaresborough	0.36	0.31	0.31	0.40		0.60	0.33	0.43	0.60	0.20	0.50	0.50	0.00	0.50	0.33	0.40	0.50	0.00	0.57	0.20	0.33	0.33	0.33
Goole	0.27	0.25	0.25	0.66	0.60		0.50	0.60	1.00	0.33	0.75	0.75	0.00	0.75	0.50	0.66	0.75	0.00	0.50	0.33	0.50	0.50	0.50
Bridlington	0.50	0.50	0.46	0.33	0.33	0.50		0.57	0.50	0.17	0.66	0.66	0.00	0.66	0.50	0.33	0.66	0.17	0.50	0.17	0.50	0.50	0.50
Malton	0.45	0.31	0.41	0.40	0.43	0.60	0.57		0.60	0.20	0.80	0.80	0.00	0.80	0.60	0.40	0.66	0.20	0.57	0.20	0.60	0.60	0.60
Selby	0.27	0.25	0.25	0.66	0.60	1.00	0.50	0.60		0.33	0.75	0.75	0.00	0.75	0.50	0.66	0.75	0.00	0.50	0.33	0.50	0.50	0.50
Helmsley	0.09	0.08	0.08	0.50	0.20	0.33	0.17	0.20	0.33		0.25	0.25	0.00	0.25	0.33	0.50	0.25	0.00	0.17	0.00	0.33	0.33	0.33
Ripon	0.36	0.33	0.33	0.50	0.50	0.75	0.66	0.80	0.75	0.25		1.00	0.00	1.00	0.75	0.50	0.60	0.25	0.66	0.25	0.75	0.75	0.75
Driffield	0.36	0.33	0.33	0.50	0.50	0.75	0.66	0.80	0.75	0.25	1.00		0.00	1.00	0.75	0.50	0.66	0.20	0.66	0.20	0.75	0.75	0.75
Pocklington	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Withernsea	0.36	0.33	0.33	0.50	0.50	0.75	0.66	0.80	0.75	0.25	1.00	1.00	0.00		0.75	0.50	0.66	0.25	0.66	0.25	0.75	0.75	0.75
Pickering	0.27	0.25	0.25	0.66	0.33	0.50	0.50	0.60	0.50	0.33	0.75	0.75	0.00	0.75		0.25	0.40	0.33	0.50	0.00	1.00	0.75	0.50
Kirkbymoorside	0.18	0.17	0.17	0.33	0.40	0.66	0.33	0.40	0.66	0.50	0.50	0.50	0.00	0.50	0.25		0.50	0.00	0.33	0.50	0.50	0.66	0.66
Filey	0.36	0.33	0.33	0.50	0.50	0.75	0.66	0.66	0.75	0.25	0.60	0.66	0.00	0.66	0.40	0.50		0.00	0.43	0.33	0.40	0.40	0.40
Mkt Weighton	0.09	0.08	0.08	0.00	0.00	0.00	0.17	0.20	0.00	0.00	0.25	0.20	0.00	0.25	0.33	0.00	0.00		0.17	0.00	0.33	0.33	0.33
Hornsea	0.27	0.29	0.46	0.33	0.57	0.50	0.50	0.57	0.50	0.17	0.66	0.66	0.00	0.66	0.50	0.33	0.43	0.17		0.17	0.50	0.50	0.50
Easingwold	0.09	0.08	0.08	0.00	0.20	0.33	0.17	0.20	0.33	0.00	0.25	0.20	0.00	0.25	0.00	0.50	0.33	0.00	0.17		0.00	0.33	0.33
Stamford Bridge	0.27	0.25	0.25	0.66	0.33	0.50	0.50	0.60	0.50	0.33	0.75	0.75	0.00	0.75	1.00	0.50	0.40	0.33	0.50	0.00		0.50	0.50
Howden	0.27	0.25	0.25	0.25	0.33	0.50	0.50	0.60	0.50	0.33	0.75	0.75	0.00	0.75	0.75	0.66	0.40	0.33	0.50	0.33	0.50		1.00
Boroughbridge	0.27	0.25	0.25	0.25	0.33	0.50	0.50	0.60	0.50	0.33	0.75	0.75	0.00	0.75	0.50	0.66	0.40	0.33	0.50	0.33	0.50	1.00	

0.39

1990

	York	Harr	Scar	Thorne	Knare	Goole	Brid	Malton	Selby	Helmsley	Ripon	Driffield	Pock	Withern	Picker	Kirkby	Filey	Mkt W	Hornsea	Easing	Stam.	Howden	Borough
York		0.75	0.6	0.21	0.32	0.26	0.65	0.32	0.26	0.16	0.42	0.32	0.26	0.32	0.26	0.11	0.16	0.21	0.26	0.16	0.21	0.26	0.26
Harrogate	0.75		0.66	0.25	0.38	0.31	0.53	0.29	0.31	0.19	0.33	0.38	0.31	0.38	0.31	0.13	0.19	0.25	0.31	0.19	0.25	0.31	0.31
Scarborough	0.6	0.66		0.31	0.46	0.38	0.44	0.36	0.38	0.14	0.31	0.46	0.38	0.36	0.29	0.15	0.23	0.31	0.38	0.23	0.29	0.29	0.29
Thorne	0.21	0.25	0.31		0.66	0.8	0.29	0.66	0.8	0.4	0.5	0.66	0.5	0.66	0.5	0.5	0.75	0.33	0.8	0.4	0.5	0.5	0.5
Knaresborough	0.32	0.38	0.46	0.66		0.83	0.46	0.5	0.83	0.29	0.55	1	0.83	0.71	0.71	0.33	0.5	0.43	0.83	0.5	0.66	0.57	0.57
Goole	0.26	0.31	0.38	0.8	0.83		0.38	0.57	1	0.33	0.44	0.83	0.66	0.57	0.43	0.4	0.6	0.29	0.43	0.6	0.5	0.43	0.43
Bridlington	0.65	0.53	0.44	0.29	0.46	0.38		0.46	0.38	0.14	0.31	0.46	0.38	0.36	0.38	0.15	0.23	0.31	0.38	0.15	0.31	0.29	0.29
Malton	0.32	0.29	0.36	0.66	0.5	0.57	0.46		0.57	0.29	0.75	0.71	0.57	0.57	0.57	0.33	0.5	0.43	0.83	0.29	0.66	0.57	0.57
Selby	0.26	0.31	0.38	0.8	0.83	1	0.38	0.57		0.33	0.44	0.83	0.66	0.57	0.38	0.4	0.6	0.29	0.66	0.6	0.5	0.43	0.43
Helmsley	0.16	0.19	0.14	0.4	0.29	0.33	0.14	0.29	0.33		0.38	0.29	0.33	0.5	0.33	0.66	0.5	0.17	0.33	0.5	0.4	0.33	0.6
Ripon	0.42	0.33	0.31	0.5	0.55	0.44	0.31	0.75	0.44	0.38		0.55	0.44	0.75	0.44	0.25	0.38	0.33	0.63	0.22	0.5	0.44	0.63
Driffield	0.32	0.38	0.46	0.66	1	0.83	0.46	0.71	0.83	0.29	0.55		0.83	0.71	0.57	0.33	0.5	0.43	0.83	0.5	0.66	0.57	0.57
Pocklington	0.26	0.31	0.38	0.5	0.83	0.66	0.38	0.57	0.66	0.33	0.44	0.83		0.57	0.66	0.4	0.6	0.5	0.66	0.6	0.8	0.66	0.66
Withernsea	0.32	0.38	0.36	0.66	0.71	0.57	0.36	0.57	0.57	0.5	0.75	0.71	0.57		0.57	0.33	0.5	0.43	0.83	0.29	0.66	0.57	0.83
Pickering	0.26	0.31	0.29	0.5	0.71	0.43	0.38	0.57	0.38	0.33	0.44	0.57	0.66	0.57		0.4	0.6	0.5	0.66	0.33	0.8	0.66	0.66
Kirkbymoorside	0.11	0.13	0.15	0.5	0.33	0.4	0.15	0.33	0.4	0.66	0.25	0.33	0.4	0.33	0.4		0.66	0.2	0.4	0.66	0.5	0.4	0.4
Filey	0.16	0.19	0.23	0.75	0.5	0.6	0.23	0.5	0.6	0.5	0.38	0.5	0.6	0.5	0.6	0.66		0.4	0.6	0.5	0.75	0.6	0.6
Mkt Weighton	0.21	0.25	0.31	0.33	0.43	0.29	0.31	0.43	0.29	0.17	0.33	0.43	0.5	0.43	0.5	0.2	0.4		0.5	0.17	0.6	0.5	0.5
Hornsea	0.26	0.31	0.38	0.8	0.83	0.43	0.38	0.83	0.66	0.33	0.63	0.83	0.66	0.83	0.66	0.4	0.6	0.5		0.33	0.8	0.66	0.66
Easingwold	0.16	0.19	0.23	0.4	0.5	0.6	0.15	0.29	0.6	0.5	0.22	0.5	0.6	0.29	0.33	0.66	0.5	0.17	0.33		0.4	0.33	0.33
Stamford Bridge	0.21	0.25	0.29	0.5	0.66	0.5	0.31	0.66	0.5	0.4	0.5	0.66	0.8	0.66	0.8	0.5	0.75	0.6	0.8	0.4		0.8	0.8
Howden	0.26	0.31	0.29	0.5	0.57	0.43	0.29	0.57	0.43	0.33	0.44	0.57	0.66	0.57	0.66	0.4	0.6	0.5	0.66	0.33	0.8		0.66
Boroughbridge	0.26	0.31	0.29	0.5	0.57	0.43	0.29	0.57	0.43	0.6	0.63	0.57	0.66	0.83	0.66	0.4	0.6	0.5	0.66	0.33	0.8	0.66	

0.47

2004

	York	Harr	Scar	Thorne	Knare	Goole	Brid	Malton	Selby	Helmsley	Ripon	Driffield	Pock	Withern	Picker	Kirkby	Filey	Mkt W	Hornsea	Easing	Stam.	Howden	Borough
York		0.86	0.62	0.25	0.3	0.4	0.64	0.35	0.4	0.1	0.5	0.4	0.3	0.25	0.3	0.15	0.35	0.25	0.36	0.3	0.25	0.3	0.35
Harrogate	0.86		0.65	0.26	0.32	0.42	0.59	0.38	0.42	0.11	0.58	0.42	0.32	0.26	0.32	0.16	0.39	0.26	0.45	0.32	0.26	0.26	0.39
Scarborough	0.62	0.65		0.36	0.33	0.57	0.76	0.5	0.57	0.15	0.56	0.47	0.43	0.27	0.43	0.21	0.5	0.36	0.5	0.43	0.36	0.43	0.5
Thorne	0.25	0.26	0.36		0.83	0.63	0.31	0.5	0.63	0.4	0.45	0.63	0.83	0.43	0.57	0.6	0.71	1	0.5	0.57	0.43	0.83	0.71
Knaresborough	0.3	0.32	0.33	0.83		0.56	0.38	0.44	0.75	0.33	0.56	0.75	1	0.57	0.5	0.5	0.63	0.83	0.6	0.71	0.57	1	0.86
Goole	0.4	0.42	0.57	0.63	0.56		0.5	0.66	0.6	0.25	0.58	0.6	0.56	0.3	0.75	0.38	0.5	0.63	0.6	0.56	0.3	0.56	0.66
Bridlington	0.64	0.59	0.76	0.31	0.38	0.5		0.35	0.41	0.13	0.42	0.41	0.38	0.24	0.38	0.19	0.35	0.31	0.37	0.38	0.31	0.38	0.44
Malton	0.35	0.38	0.5	0.5	0.44	0.66	0.35		0.36	0.29	0.5	0.5	0.44	0.2	0.86	0.25	0.4	0.5	0.55	0.63	0.2	0.44	0.56
Selby	0.4	0.42	0.57	0.63	0.75	0.6	0.41	0.36		0.25	0.46	0.6	0.75	0.44	0.55	0.38	0.66	0.63	0.5	0.55	0.44	0.75	0.66
Helmsley	0.1	0.11	0.15	0.4	0.33	0.25	0.13	0.29	0.25		0.18	0.27	0.33	0.17	0.33	0.25	0.29	0.4	0.2	0.33	0.4	0.33	0.29
Ripon	0.5	0.58	0.56	0.45	0.56	0.58	0.42	0.5	0.46	0.18		0.73	0.56	0.45	0.42	0.27	0.38	0.45	0.75	0.55	0.33	0.55	0.64
Driffield	0.4	0.42	0.47	0.63	0.75	0.6	0.41	0.5	0.6	0.27	0.73		0.75	0.63	0.55	0.38	0.5	0.63	0.64	0.75	0.44	0.75	0.88
Pocklington	0.3	0.32	0.43	0.83	1	0.56	0.38	0.44	0.75	0.33	0.56	0.75		0.57	0.5	0.5	0.63	0.83	0.6	0.71	0.57	1	0.86
Withernsea	0.25	0.26	0.27	0.43	0.57	0.3	0.24	0.2	0.44	0.17	0.45	0.63	0.57		0.22	0.6	0.33	0.43	0.36	0.38	0.43	0.57	0.5
Pickering	0.3	0.32	0.43	0.57	0.5	0.75	0.38	0.86	0.55	0.33	0.42	0.55	0.5	0.22		0.29	0.44	0.57	0.33	0.71	0.22	0.5	0.63
Kirkbymoorside	0.15	0.16	0.21	0.6	0.5	0.38	0.19	0.25	0.38	0.25	0.27	0.38	0.5	0.6	0.29		0.43	0.6	0.3	0.29	0.33	0.5	0.43
Filey	0.35	0.39	0.5	0.71	0.63	0.5	0.35	0.4	0.66	0.29	0.38	0.5	0.63	0.33	0.44	0.43		0.71	0.42	0.44	0.33	0.63	0.55
Mkt Weighton	0.25	0.26	0.36	1	0.83	0.63	0.31	0.5	0.63	0.4	0.45	0.63	0.83	0.43	0.57	0.6	0.71		0.5	0.57	0.43	0.83	0.71
Hornsea	0.36	0.45	0.5	0.5	0.6	0.6	0.37	0.55	0.5	0.2	0.75	0.64	0.6	0.36	0.33	0.3	0.42	0.5		0.6	0.36	0.6	0.7
Easingwold	0.3	0.32	0.43	0.57	0.71	0.56	0.38	0.63	0.55	0.33	0.55	0.75	0.71	0.38	0.71	0.29	0.44	0.57	0.6		0.38	0.71	0.86
Stamford Bridge	0.25	0.26	0.36	0.43	0.57	0.3	0.31	0.2	0.44	0.4	0.33	0.44	0.57	0.43	0.22	0.33	0.33	0.43	0.36	0.38		0.57	0.5
Howden	0.3	0.26	0.43	0.83	1	0.56	0.38	0.44	0.75	0.33	0.55	0.75	1	0.57	0.5	0.5	0.63	0.83	0.6	0.71	0.57		0.86
Boroughbridge	0.35	0.39	0.5	0.71	0.86	0.66	0.44	0.56	0.66	0.29	0.64	0.88	0.86	0.5	0.63	0.43	0.55	0.71	0.7	0.86	0.5	0.86	

0.48

APPENDIX 15

Resource Availability (average consumer spend per firm)

	York	Harrogate	Scarborough	Thorne	Knaresborough	Goole	Bridlington	Malton	Selby	Helmsley	Ripon	Driffield
1977	$124,124	$131,965	$39,159	$284,101	$144,089	$74,940	$73,957	$97,998	$111,051	$168,769	$145,706	$172,664
1978-79	$129,455	$144,431	$42,341	$289,744	$142,731	$81,426	$84,980	$153,713	$129,867	$197,930	$141,978	$175,934
1980	$137,598	$149,653	$45,599	$374,559	$162,154	$92,723	$87,366	$143,565	$126,329	$225,264	$175,756	$198,825
1981	$131,357	$133,948	$41,141	$309,692	$166,714	$88,201	$80,043	$167,315	$139,726	$214,159	$152,722	$187,707
1982	$131,070	$128,686	$39,857	$278,410	$169,336	$93,247	$78,679	$170,739	$141,777	$217,303	$154,319	$168,594
1983	$132,127	$126,639	$40,018	$262,038	$164,165	$88,000	$82,980	$162,129	$137,307	$227,989	$161,236	$176,152
1984	$139,067	$121,106	$38,784	$243,940	$182,895	$82,197	$82,681	$186,096	$122,254	$234,224	$164,961	$162,199
1985	$131,332	$116,873	$38,489	$270,308	$222,025	$83,336	$78,476	$189,100	$123,551	$236,708	$142,308	$181,384
1986	$141,864	$129,785	$44,366	$281,430	$182,391	$99,150	$89,155	$218,436	$152,092	$271,963	$142,479	$186,791
1987	$142,160	$135,858	$43,708	$327,210	$180,684	$102,167	$92,035	$209,567	$132,811	$288,375	$114,637	$197,255
1988	$147,229	$138,697	$45,590	$315,895	$160,564	$116,459	$98,527	$204,029	$150,332	$307,216	$125,840	$190,263
1989	$156,708	$132,980	$45,625	$338,311	$163,582	$110,737	$100,106	$242,368	$143,564	$330,056	$127,707	$172,261
1990	$151,991	$133,867	$46,185	$343,362	$150,829	$132,583	$98,079	$225,475	$131,549	$336,038	$123,098	$113,540
1991	$155,441	$133,918	$45,441	$347,629	$160,994	$130,553	$96,661	$168,775	$127,239	$341,279	$113,683	$109,379
1992	$161,207	$136,436	$46,965	$336,003	$201,185	$160,609	$100,112	$168,745	$135,025	$362,161	$119,694	$111,998
1993	$173,311	$150,076	$51,565	$351,814	$212,200	$147,360	$111,616	$168,181	$124,499	$381,633	$125,178	$109,336
1994	$170,189	$147,028	$50,182	$329,294	$216,746	$146,195	$115,772	$162,877	$117,275	$389,446	$136,957	$112,741
1995	$177,892	$164,195	$55,677	$382,478	$234,086	$181,937	$125,205	$176,589	$131,603	$420,216	$158,515	$122,897
1996	$177,595	$160,238	$55,777	$368,094	$219,959	$167,009	$131,668	$176,363	$138,084	$440,908	$164,243	$115,776
1997	$180,684	$162,076	$55,850	$440,213	$202,852	$170,831	$132,522	$190,469	$135,360	$449,012	$179,047	$114,819
1998	$175,892	$162,762	$56,628	$347,491	$205,275	$192,058	$136,173	$204,841	$136,695	$453,968	$202,751	$117,216
1999	$175,885	$165,448	$59,515	$353,360	$232,386	$212,574	$141,654	$178,992	$134,549	$464,566	$212,836	$130,414
2000	$177,419	$173,523	$61,818	$390,106	$227,950	$238,586	$138,536	$218,218	$125,694	$479,261	$215,262	$147,120
2001	$189,330	$177,168	$62,266	$401,261	$262,164	$249,318	$142,991	$191,025	$122,453	$497,758	$181,556	$161,028
2002	$194,465	$181,507	$63,103	$444,877	$268,554	$267,365	$134,928	$203,878	$128,038	$514,322	$186,011	$152,604
2003	$194,126	$181,916	$62,791	$417,933	$273,268	$261,560	$147,239	$230,194	$129,075	$527,488	$212,314	$185,877
2004	$203,336	$186,278	$63,411	$421,949	$275,297	$217,590	$161,981	$245,118	$129,184	$536,609	$206,146	$198,082

	Pocklington	Withernsea	Pickering	Filey	Kirkbymoorside	Mkt Weighton	Hornsea	Easingwold	Stamford Bridge	Howden	Boroughbridge
1977	$631,591	$177,327	$132,733	$103,393	$110,410	$152,332	$407,447	$109,950	$53,198	$44,685	$187,327
1978-79	$247,494	$166,038	$155,617	$121,276	$129,506	$133,480	$479,509	$128,503	$62,124	$53,714	$218,667
1980	$169,399	$188,589	$118,033	$138,043	$98,273	$110,067	$547,589	$145,750	$56,324	$52,166	$198,169
1981	$161,418	$223,673	$112,179	$131,257	$120,138	$114,676	$522,340	$138,097	$59,248	$43,493	$234,419
1982	$164,613	$181,714	$114,105	$133,571	$142,632	$129,169	$533,229	$140,043	$60,035	$52,906	$189,948
1983	$144,640	$136,289	$120,008	$140,544	$112,557	$135,397	$562,804	$146,846	$62,901	$56,984	$165,779
1984	$149,325	$140,129	$185,380	$115,838	$132,529	$138,972	$581,610	$150,776	$64,534	$51,469	$145,725
1985	$181,968	$165,350	$187,793	$117,397	$134,312	$157,860	$591,203	$152,289	$58,617	$37,315	$147,013
1986	$150,050	$162,965	$216,271	$135,257	$154,744	$181,208	$683,155	$174,873	$61,143	$43,904	$196,717
1987	$139,875	$134,505	$459,714	$143,815	$164,534	$170,642	$728,485	$185,323	$59,351	$47,638	$178,480
1988	$149,708	$143,404	$245,440	$153,629	$175,760	$181,630	$780,416	$295,984	$75,774	$51,896	$147,634
1989	$161,579	$138,766	$264,290	$137,913	$165,668	$175,466	$210,764	$158,908	$67,751	$51,796	$109,619
1990	$132,203	$117,824	$179,792	$140,787	$169,119	$162,264	$215,750	$161,700	$68,889	$49,368	$131,674
1991	$134,868	$102,644	$137,253	$143,360	$229,612	$106,540	$176,232	$218,844	$64,498	$51,173	$133,502
1992	$133,428	$109,007	$194,633	$132,635	$209,397	$127,315	$188,005	$233,720	$55,615	$55,394	$140,293
1993	$144,071	$123,795	$154,160	$124,341	$221,223	$117,682	$142,249	$371,756	$58,609	$71,414	$161,035
1994	$183,984	$117,393	$157,658	$128,957	$198,037	$119,388	$145,909	$254,483	$63,801	$74,260	$180,809
1995	$166,185	$136,511	$170,479	$125,656	$190,421	$108,858	$158,238	$207,203	$73,764	$90,676	$158,062
1996	$196,110	$155,282	$179,254	$150,632	$180,266	$120,670	$194,674	$174,975	$67,726	$108,962	$150,535
1997	$204,064	$158,249	$146,347	$138,428	$184,033	$106,514	$132,823	$224,066	$78,829	$112,913	$151,797
1998	$210,680	$174,665	$148,271	$127,832	$186,520	$103,376	$110,411	$227,870	$79,705	$103,212	$151,963
1999	$183,358	$178,869	$190,057	$132,716	$147,182	$101,740	$113,535	$187,633	$81,571	$87,861	$153,977
2000	$192,937	$184,656	$157,175	$154,287	$164,884	$114,900	$107,877	$243,343	$78,546	$101,329	$188,734
2001	$270,749	$192,032	$207,133	$133,778	$187,737	$131,591	$122,865	$202,487	$71,556	$117,460	$173,572
2002	$277,777	$184,461	$175,455	$137,014	$212,499	$135,905	$137,369	$172,526	$77,921	$89,247	$194,661
2003	$282,426	$208,298	$184,291	$139,664	$180,994	$126,627	$138,466	$175,280	$84,618	$98,005	$131,432
2004	$285,234	$232,530	$197,419	$155,020	$199,949	$129,033	$125,871	$211,994	$91,564	$89,711	$165,068

APPENDIX 16

Domino's and Pizza Hut's TV Advertising

IPA **Advertising Effectiveness Awards** **2002**

Institute of Practitioners in Advertising, 44 Belgrave Square, London SW1X 8QS, UK
Tel: +44 (0)171 235 7020 Fax: +44 (0)171 245 9904

Agency: BLM Media **Author:** Charlie Makin

BEST INTERACTIVE
BEST MEDIA THINKING
&
SILVER AWARD

Domino's Pizza Group Ltd

Building a High Street Brand Through a Change in Media Strategy

There are few examples where a change in media strategy has altered the fortunes of a business over a sustained period.

Can you prove this strategy has worked?

In the period 1998 to 2002 there is an inextricable link between communication investment and incremental sales.

1. The Simpsons sponsorship. An investment of £2.4m generated incremental sales in excess of £12.7m.
2. TV advertising. An investment of £0.9m in TV advertising generated incremental sales of £17.2m in 2001.
3. Competition. Although outspent 8:1 by Pizza Hut, Domino's has grown market share in a growing market.
4. Number of stores. The growth in store numbers has increased the efficiency of advertising investment. The brand stimulated demand from franchisees.
5. Individual store sales. Average weekly sales for individual stores have increased in line with advertising investment (Table 2).

The above excerpts detail the enormous levels of expenditure committed by Pizza Hut (approximately 7.2 million pounds) and Domino's (3.5 million pounds) directly into TV advertising in the UK market.

Source: http://www.arenablm.co.uk/pdf/IPA%20Dominos%20Pizza%202002.pdf

Wednesday, 28 January 2009, 19:21 EUR-USD 1.32440 +0.00824

:. Food Industry News

REUTERS

UK Domino's Pizza Sees Life After the Simpsons

Source: Reuters
24/11/2006

email print

London, Nov 24 - Domino's Pizza UK & Ireland Plc is looking at new ways to spend 10 percent of its advertising budget after being forced to ditch its long-running sponsorship of U.S. television series The Simpsons.

UK media regulator Ofcom ruled this week that the advertising of food high in fat, salt and sugar during programmes intended for children under 16 should be banned.

This forced Britain's largest home-delivery pizza chain to drop an association with The Simpsons that has run for nearly nine years.

"It is disappointing," Chief Operating Officer Chris Moore told Reuters in a telephone interview. "The sponsorship gave potential customers a constant reminder of the brand at meal times 365 days a year.

"We don't advertise at children. We've never done Nickelodeon for example," he said. "It's a bit of a ricochet."

Since the Simpsons sponsorship started in 1998, its share of the company's marketing budget has shrunk to 10 percent from 35 percent, while boosting brand awareness of Domino's to 98 percent of the British market from 65 percent.

But Moore said there were positives to be gained from the loss.

"There are a number of different things that would make good use of that 10 percent," he said. "We have a lot of data on customers, so we can do more direct mailing, while advertising over the Web has grown phenomenally."

MARKETING BUDGET

Moore explained that the company takes for its marketing budget 4 to 5 percent of revenues from each of the 428 stores and that it has opened 40 to 50 new outlets a year.

The chain reported overall revenue of 200.7 million pounds ($384.5 million) in 2005.

"Our target is 800 to 1,000 stores. Our pace of growth is how we like it. We could do 70 a year, but we'd probably end up closing 20 of those in the short term," he said.

Moore is a 16-year veteran of Domino's, which is now fully independent from its founding company in the United States, although it pays Domino's Pizza Inc. a cut of its revenues every year.

Analysts at Numis Securities advised shareholders in a note that the Simpsons loss should not affect their overall view of Domino's. "These advertising restrictions do not fundamentally alter the attractive dynamics of the Domino's Pizza business model."

Domino's said on Thursday it would return 10 million pounds to shareholders by way of a tender offer.

Its shares were down 1.8 percent at 543.5 pence by 1251 GMT on Friday, valuing the group at 298 million pounds.

Moore said he first started in the industry as a 19-year-old, when he tried to open a restaurant in Rio de Janeiro but was prevented from doing so by Brazilian gangsters.

Source: http://www.flex-news-food.com/pages/5972/Fat/Restaurant/UK/uk-dominos-pizza-life-simpsons.html

APPENDIX 17

Domino’s Interactive TV Advertising

ONLINE

TiVo Completes The Evening TV Dinner: Adds Domino's Pizza Ordering

Posted by Kit Eaton at 10:30 PM on November 17, 2008

Ahh...digitally controllable TV, and the chance of fresh tasty pizza: That's what TiVo and Dominos Piz are now offering. Broadband-connected TiVo users will be able to order pizza for delivery or pick-up (though that'd involve leaving the comforting hug of your sofa's cushions...crazy!) and then can ever track the progress all via the TiVo interface. It starts today, it's free to broadband TiVo subscribers, and the only inconvenience is having to pay in cash when the food arrives. Press release below.

> AU: We know this is coming to Australia next year... just a few more months before you can literally live on your couch.

Source: http://www.gizmodo.com.au/2008/11/tivo_completes_the_evening_tv_dinner_adds_dominos_pizza_ordering-2.html

Domino’s serves up profit growth thanks to promotional success and online ordering

August 20, 2008
James Ferre

Australian pizza maker Domino’s Pizza Enterprises Limited (DMP) today announced a $11.8 million full year Net Profit After Tax, up 29.6% on the previous year.

DMP, Australia’s only publicly-listed pizza company and the master franchisor for the Domino’s Pizza brand in Australia, New Zealand, France, Belgium and The Netherlands, reported that their profit was generated from Total Network Sales of $591.2 million, an increase of 13.9% on full year 2007.

The opening of 36 new stores in Europe and 42 stores in Australia and New Zealand, including five stadium stores, brought their total number to 741 - the network of 741 incorporates 437 in Australia.

Domino’s Pizza Enterprises Limited CEO and MD, Don Meij, advised that recent sales had been aided by strong promotional success in Australia, New Zealand and Europe, along with positive feedback for online ordering.“Successful promotional launches in all three markets contributed to strong Same Stores Sales growth, including the Big Taste Range in Australia and the launch of TV advertising in France,” Mr Meij noted. “All markets continue to benefit from technological advances in internet ordering with The Netherlands now averaging 19.2% of all delivery orders placed online and more than 12% of Australian sales generated through internet ordering. We have also introduced a new telephone ordering number in Australia, 1300 DOMINOS and France recently launched a new four digit number, 3959.”

Domino’s Pizza Enterprises Limited was Australia’s first publicly-listed pizza chain, making its debut on the Australian Stock Exchange in May 2005.

Source: http://www.ausfoodnews.com.au/2008/08/20/dominos-serves-up-profit-growth-thanks-to-promotional-success-and-online-ordering.html

APPENDIX 18

List of Firms Interviewed

Hobart Area

Mondo’s Pizza	397 Macquarie Street, South Hobart
Bakers	Cnr Barrack & Macquarie Street, Hobart
Brazil Pizza Parlor	171 Sandy Bay Road, Sandy Bay
Cantina Pizza House	240 Main Road, Glenorchy
Sandy Bay Woodfired Pizza	7a Beach Road, Sandy Bay
Hobart Woodfired Pizza	118 Melville Street, Hobart
La Bella Pizza	163 Sandy Bay Road, Sandy Bay
Leaning Towner Pizza Bar	5 Gregory Street, Sandy Bay
Maldini’s Restaurant	47 Salamanca Place, Hobart
Casablanca Pizza House	221a Elizabeth Street, Hobart
Da Angelo’s Restaurant	47 Hampden Road, Battery Point
Marti Zucco’s Pizza Restaurant	364 Elizabeth Street, North Hobart
Mister Pizza	117 Sandy Bay Road, Sandy Bay
Perfect Pizza	93 Golburn Street, West Hobart
Poppa’s Pizza	443b Main Road, Glenorchy

North-East Launceston Area

Calabrisella Pizza	56 Wellington Street, Launceston
Ozzie Pizza Place	373 Invermay Road, Mowbray
Mario’s Dial a Pizza	Hobart Road, Youngtown
Village Pizza	18a Marlborough Street

North-West Launceston Area

The Red Grasshopper	16 Reibey Street, Ulverstone
Mama Rosa’s	25 Ladbrooke Street, Burnie
Herb’s Pizza	3/132 William Street, Devonport

Geelong Area

Labuan Pizza	11 Labuan Square, Norlane
Surf Coast Pizza	12 Gilbert Street, Torquay
Le Campagnola	272 Shannon Road, Geelong West

North Yorkshire / East Riding Area

Deals Takeaway	9 Castle Road, Scarborough
Prima Pizzeria	33 Kirkgate Street, Ripon
Joe Rigatoni Italian Restaurant	3 Ripon Road, Harrogate
Tico Tico	92 High Street, Knaresborough
Florio’s Pizzeria Restaurant	11 Yorkersgate Street, Malton
Café Uno	1-3-Clifford Street, York
Golden Skewers	51 Micklegate Road, Selby
Pinocchio’s Pizzeria	1 Mount Parade, Harrogate
Donatello’s	6 Kings Road, Harrogate

APPENDIX 19

Peer-Reviewed Papers Published from this Study

Journal Paper

Jones, C. (2007a). Using old concepts to gain new insights: Addressing the issue of consistency. ***Management Decision***, v 45 (1): 29-42.

See http://eprints.utas.edu.au/857/

Conference Papers

Jones, C. (2008a). Imagining, developing and explaining the concept of Transferred Demand: Transcendental realism and entrepreneurship. ***Proceedings of the 53rd ICSB Conference***, Halifax, Canada, June 22-25, 2008.

See

Jones, C. (2008b). The assumption of competition: An argument for considering facilitation. ***Proceedings of the 5th AGSE International Entrepreneurship Exchange***, Melbourne, Australia, February 6-9, 2007.

Jones, C. (2007b). Firm survival: Adding transferred demand into the equation. ***Proceedings of the 4th AGSE International Entrepreneurship Exchange***, Brisbane, Australia, February 6-9, 2007.

See http://eprints.utas.edu.au/859/

Jones, C. (2006a). Understanding regional start-up Success: A lily not yet guilded. ***Proceedings of the 29th Institute for Small Business and Entrepreneurship Conference***, Cardiff, UK, October 31-November 2, 2006.

See http://eprints.utas.edu.au/860/