

# **LASERFIT CLOTHING**

## **Store Location Evaluation**

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## **Executive Summary**

Laserfit Clothing is a new concept in men's suit retailing that has emerged from technological advances in mass customisation and laser full body scanning. Combined these two new technologies allow the costs of tailor made suits to be reduced to appeal to a broader market than is available now at the current price points. In addition further services can be incorporated at little additional cost that will address the needs of the time poor businessman.

Laserfit Clothing will go to market with a two-pronged marketing approach. A business to consumer approach will rely on word of mouth, direct mail and internet access to potential customers. As the concept is new, additional awareness will need to be generated. A single retail premises will be located in the best area to capture the hearts, minds and eyes of the target market.

This report recommends that a store be located in the Sydney CBD and front onto one of the major pedestrian corridors between the down town office building precinct and one of the major transport hubs.

The store is to be 200 – 250 square metres in size and have a good frontage that can be used to advantage to outline the features and benefits of the Laserfit "Perfect Suit".

Data that has been distilled for this report is to be used to create a briefing document that will be presented to a number of city real estate agents with a 3 – 6 month time horizon on the location of suitable premises.

Other findings from this report are to be used within the marketing plan for Laserfit clothing.

## Background

### Concept

Imagine a future where anyone could think up an idea for a garment -- with individualized fit, design, colour and print – and then have it designed, cut and sewn digitally. Technology has revolutionized the shopping experience and opened the door to serving markets of one, diminishing the idea of a "target market" for some businesses.

Laserfit Clothing is a men's suit retailer whose vision is to make off-the-peg suits redundant and the mission is to re-educate and change the way men buy suits. The company differentiates itself from other retailers in a number of ways, these are:

- The company only sells made to measure men's suits.
- It is to operate out of a central retail location, supplemented by a team of travelling "tailors" who will visit your home or office to measure and fit you for a suit.
- It uses Australian designers and modern hi-tech fabrics to fashion "The Perfect Suit".
- A full body laser scanner is used to map 200,000 body points, which are then converted to 200 exact measurements for each garment. This ensures the "perfect fit".
- All Laserfit suits carry a six-year warranty that covers materials and workmanship.
- One visit and fitting are all that are required to complete the purchase. The final garment is delivered direct to the customer's choice of delivery point.
- Laserfit Clothing offers a time payment option where a suit can be paid off on a monthly payment schedule.

A full business plan has been developed and the project is to a point where a site for the retail presence of the company needs to be selected.

New South Wales has been chosen as the location for the initial trial store as this is the home state of the promoters of the project.

## The Market

### Target Market.

The target market for Laserfit Clothing has the following profile:

- Male.
- Aged 18 – 60.
- Employed, self-employed or a close to graduation business student.
- Working or about to enter a white-collar occupation.
- Possibly time poor.
- Reasonably affluent.

### Market Size.

Prices range from \$200 to \$2,500 for men's suits. Off the peg suits start at \$200 and are available from discount menswear and department stores. The upper end of the price range represents bespoke suits, often made off-shore at renown men's fashion houses. The bulk of the market by value is estimated to be in the \$500 - \$1,000 price bracket.

It is estimated, that a suit should be able to be worn twice a week, 52 weeks a year (in appropriate weight fabric) for about six years and that the average businessperson has between 2 – 3 suits. This equates to 0.55 suits per year on average purchase potential for suit buyers.

The Australian apparel sector is valued at around \$10 billion per year at retail and clothing imports are averaging \$250 - \$300 million per month.

Within this market is the men's business suit sector. It is estimated that men's suits contribute approximately \$384 million per annum to the total market.

### Locating the Target Market.

Statistics compiled by the Australian Bureau of statistics can assist in locating potential "clusters" of potential targets to assist in the location of a retail store. Using information from the salary & wage earner statistics (see appendix 7) and combining this with a "suit-wearing index" based on occupation (see appendix 6) estimates of total target market size can be estimated. A further distillation can be made by using the average suits per year figure to arrive at a potential yearly market size.

<b>District</b>	<b>Targets</b>	<b>Potential</b>	<b>Suits/Year</b>
1. St George-Sutherland	43,844	23,557	12,956
2. Lower Northern Sydney	37,155	23,650	13,008
3. Hornsby-Ku-ring-gai	30,276	18,866	10,376
4. Blacktown-Baulkham Hills	34,464	18,160	9,988
5. Inner Sydney	28,316	15,751	8,663

A retail store could be located in the major shopping precinct or mall in any of the above 5 districts. There would be a reasonable probability of a profitable operation.

## Locating Laserfit Clothing.

### Location Alternatives.

An alternative to locating a retail store close to where the higher densities of the target market reside is to locate a store close to where the target market work.

A review of statistics compiled by the City of Sydney (see appendix 1) reveals the following:

- The daily working population of Sydney CBD is 253,000
- Males make up 53% of the population.
- More than half of the population is either a professional, associate professional or manager 51.9%
- Almost half of the population travel to work by train.
- Less than 25% travel to the CBD by car.
- The balance catch buses, ferries or some other means.

Combining this data with the assumptions that have been made to arrive at the targets, potential targets and suits per year

<b>District</b>	<b>Targets</b>	<b>Potential</b>	<b>Suits/Year</b>
Sydney CBD	134,090 <sup>1</sup>	73,750 <sup>2</sup>	41,300 <sup>3</sup>

This data suggests that in terms of potential business locating a store in the Sydney CBD would yield a potentially greater concentration of targets than the best district outside of the CBD.

The fact that a potential CBD location for Laserfit Clothing is possibly more than 3 times that of the best suburban location is compelling and focuses the next section of this report on determining where within the Sydney CBD a suitable location may be found.

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<sup>1</sup> Total daily workforce x male proportion.

<sup>2</sup> Targets x "Suit Probability Index.

<sup>3</sup> Potential x Frequency of Purchase.

## Meeting the Market

### Competitors

Competitors to the Laserfit Clothing concept are:

- Menswear stores
- Department stores
- Men's Tailors (Bespoke)

A review of the Telstra Yellow Pages Online web site has revealed the following numbers of competitors within the Sydney CBD. (See appendix 4)

Competitor Type	Number
Menswear Retailers	80
Tailors (Bespoke)	9
Department Stores	3

These competitors are listed in appendix 4 and have been mapped onto a map of the Sydney CBD using green dots. (See appendix 5)

There is a concentration of competitors within the main shopping precincts of George Street and slightly north of Town Hall railway station. These competitors are located within the main Arcades and shopping precincts like Pitt Street Mall, Centre Point, Skygarden etc. Otherwise competitors are evenly distributed throughout the CBD.

### Accessibility

Within the Sydney CBD there are a number of significantly sized office buildings. It could be assumed that the size of an office building is directly proportional to the number of people who work within the building. The top 20 Sydney CBD office towers are as follows:

- |                           |                          |
|---------------------------|--------------------------|
| 1. Citigroup Tower        | 11. 1 O'Connell Street   |
| 2. Chifley Tower          | 12. The Peak             |
| 3. MLC Centre             | 13. 201 Elizabeth Street |
| 4. Governor Phillip Tower | 14. Gateway Plaza        |
| 5. Aurora Place           | 15. HSBC Building        |
| 6. AAP Building           | 16. Capita Centre        |
| 7. AMP building           | 17. Horden Towers        |
| 8. Century Tower          | 18. Pacific Tower        |
| 9. Grovenor Place         | 19. Telstra Plaza        |
| 10. Australia Square      | 20. Westpac Plaza        |

Source: [www.Skyscrapers.com](http://www.Skyscrapers.com)

It can also be assumed that these office buildings would have a higher proportion of Laserfit Clothing targets than other areas of the CBD or surrounding areas. These plus other significant buildings have been plotted on the "Places of Interest Map". It can be seen that these buildings are concentrated to the North of the CBD just

East of Wynyard railway station and to the South of the Circular Quay transport terminus.

Within the Sydney CBD there are a number of major shopping centres as well as traditional strip shopping locations. A decision needs to be made whether to locate Laserfit Clothing within one of these centres or to locate it on the strip.

### **Traffic Flow**

In terms of access it is also important to note the location of the transport hubs and to establish what feeder roads are likely to sustain the major pedestrian traffic flow.

The main transport hubs are as follows:

- Wynyard Railway Station
- Wynyard Bus Terminal
- Circular Quay Railway Station
- Circular Quay Ferry Terminal
- Circular Quay Bus Station
- Town Hall Railway Station
- St James Railway Station
- Museum Railway Station
- Central Railway & Bus terminal.

There is a significant concentration of transport services in the North of the CBD. Wynyard and Circular Quay, two of the busiest transport hubs within the city, underpin this area. Feeder roads that are likely to have significant pedestrian traffic are:

- George Street
- Hunter Street
- Grosvenor Street
- Bridge Street
- Alfred Street
- Pitt Street

Further research is required to ascertain the exact traffic flows. This should be undertaken once an area has been narrowed down for selection. A traffic flow count should then be commissioned. However given that almost 75%<sup>1</sup> of city workers use transport other than cars these roads are likely to carry significant pedestrian volumes at commuting times.

### **Natural & Artificial Boundaries**

There are a number of natural and artificial boundaries that exist North of the CBD. The area to the North is bounded by Sydney Harbour from a natural point of view and by the Rocks which is more of a tourist precinct rather than a business district.

To the West the Western Distributor freeway acts as a physical barrier and also the Darling Harbour industrial area and port limit this catchment direction.

To the East The Domain, Botanical Gardens, Hyde Park and the Conservatorium of Music act as physical barriers.

The catchment area can extend further south than any other direction and is likely to reach Liverpool Street, which is the limit of most of the commercial aspects of the city.

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<sup>1</sup> Sydney City Workforce fact sheet.



### Visibility

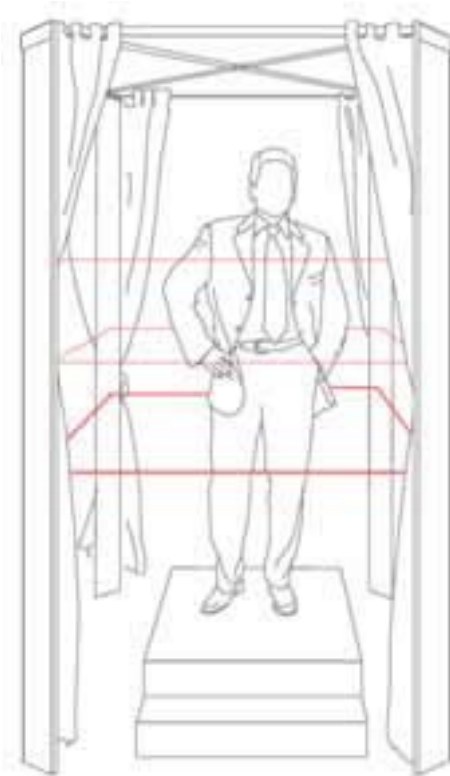
While the concept of Laserfit Clothing relies on a mix of direct to consumer selling in the home or office and traditional storefront retail, from an awareness point of view it is important to select the initial retail site so that it can create a high degree of awareness. This would dictate that the store is located on one of the main pedestrian traffic flow streets between the transport hubs and the major office building precinct, ideally this would be at street level, with a wide enough store frontage to enable displays that can be used to explain the Laserfit Clothing concept.

As the majority of the target market do not use cars to travel to their workplace, parking is not an issue in this case.

Laserfit Clothing is considered to be more of a destination store rather than a parasite store. As the concept is new and unique, awareness of the concept is of paramount importance. For this reason location of the store is likely to be weighted towards the site that offers the greatest pedestrian traffic flow and convenience to the CBD office precinct. Within the Sydney CBD this is likely to be a strip location in the vicinity of the corner of Pitt and Hunter Streets. This will be the point from which the primary and secondary trading areas are determined.

### Store Size

It is anticipated that the store at peak times will need to be able to process four customers concurrently. It also will require space for a full body laser scanner.



Depiction of customer being scanned for measurements.

It is anticipated that 200 – 250 square metres will be required.

## The Trade Area

### Primary Trade Area

Using the intersection of Pitt & Hunter Streets as the reference point of our primary trade area, an area equivalent to the distance that can be traveled by a pedestrian in ten minutes or less is determined. (See appendix 5) Characteristics of this area are as follows:

- 68% of the cities tallest office buildings fall within the primary trading area.
- The area covers the main public transport commuter corridors that run between the main Sydney commercial areas and the Circular Quay and Wynyard transport terminals.
- 35% of the competitors fall within the primary trading area.

### Secondary Trade Area

This area unlike the primary trading area is not symmetrical.

- It is bordered on the east by the Western Distributor roadway and Darling Harbour Industrial sector.
- On the North, Sydney Harbour borders the area.
- On the East the area is bordered by the Botanical Gardens and Hyde Park.
- The area extends south to Liverpool Street, which is considered the furthest point a customer is likely to travel within the city precinct.
- All competitors, and significant office buildings fall into either the primary or secondary trading areas.

### Tertiary Trade Area

A tertiary trade zone has not been nominated. This is not to say that there are not areas of interest from a target customer point of view outside the primary and secondary trade areas. A strict reading of the definition of a trade area:

*A trade area is a contiguous geographic area that accounts for the majority of a store's sales and customers.<sup>1</sup>*

The districts highlighted in the ABS statistics with a high potential residency of Laserfit Clothing targets should be considered areas of interest from a marketing point of view. They have not been identified as the tertiary zone as they are not contiguous with the primary and secondary trade areas.

The importance of communicating with targets within these areas should not be underestimated.

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<sup>1</sup> Retailing Management Levy & Weitz International Edition 2000 page 267

## **Conclusion**

From the data that has been collated and distilled throughout this report, it can be concluded that Laserfit Clothing should focus its efforts on locating a store that fronts onto one of the main arterial pedestrian routes that connect either Wynyard Railway station or Circular Quay Railway station with the downtown office block precinct of the Sydney CBD. This area is east of George Street, north of Martin Place west of Macquarie Street and south of Circular Quay. The ideal heart of the area is around the corner of Pitt Street and Hunter Street.

A site should be sort that has a reasonable frontage on street level that can be used to communicate with passing traffic the features and benefits of the Laserfit "Perfect Suit" offer.

The store will need to be between 200 – 250 square metres in size to accommodate four measuring up stations and one full body scanner.

A document outlining the site requirements is to be produced so that a number of inner city real estate agents can be briefed on the proposed store.

Further traffic flow studies are to be commissioned within the designated store location area. It is proposed that this phase of the Laserfit Clothing company establishment will take between 3 – 6 months.

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## Appendix

### Appendix 1 – Fact Sheet Sydney Workforce

Every day, a workforce more than ten times the City of Sydney's residential population commutes to the city. The cosmopolitan nature of this workforce is one of the city's great strengths, adding to its vitality and driving its economic success.

#### Population

- The working population of the City of Sydney is 253,000. This is an increase of 25,000 in the past five years and an increase of over 50,000 over the past decade.

#### Demographics

- The average age of the city worker is 34 years and nine months.
- 53% of the city workforce is male and 47% female.
- Between 1991 and 1996, women dominated employment growth, accounting for 61.6%.
- While almost 50% the city workforce is married, this proportion is decreasing over time.
- Within the city workforce, 29.3% of men are married compared to 18.8% of women.

#### Place of Birth

- 65% of the City of Sydney workforce was born in Australia, leaving a significant proportion (35%) born overseas, many in Asian countries.
- Overall, 8.6% of the Sydney Metropolitan workforce was born in six Asian countries - China, Hong Kong, Vietnam, Malaysia, the Philippines and India - with 16.7% of employment growth between 1991 and 1996 occurring among workers from these countries.
- During the same five-year period, the number of city workers born in Europe declined.

#### Languages Spoken

- Almost one quarter of the city workforce (23.1%) can speak a language other than English.

- Chinese is the most common of these second languages, with more than 5% of the city workforce speaking one of the major Chinese dialects.
- With more than 50,000 city workers speaking a second language, it is not surprising that Sydney has emerged as a significant player in the global call centre industry.

### **Education**

- 9.6% of the City of Sydney workforce attends a university or other educational institution.
- Between 1991 and 1996, the proportion of the city workforce attending university rose considerably, by 42.5%.
- 62.4% of the city workforce holds an educational qualification.
- One-third of the city workforce – more than 70,000 workers – hold a bachelor degree or higher educational qualification, an increase of more than 50% from 1991.
- A further 10% – 23,000 workers – possess an undergraduate or associate diploma.
- Of the 70,000 city workers holding a degree or higher qualification, 30% are qualified in Business and Administration.

### **Type of Work**

- Three-quarters of women and seven-eighths of men in the City of Sydney workforce are employed on a full-time basis.
- The majority of the city workforce is made up of employees rather than employers or "own account" workers.
- More than half the city workforce falls into the top three high-skill occupation categories: one-quarter (26.1%) are professionals, 15.5% associate professionals and a further one-tenth (10.3%) managers and administrators.
- Almost one-quarter (22.3%) of city workers are intermediate clerical, sales and service workers while one-tenth (9.2%) are advanced clerical and service workers.

- Over the five-year period 1991-1996, the proportion of women employed as managers and administrators in the city workforce increased by 63% and the proportion employed as associate professionals by more than a half (51%).

### **Income**

- The increased concentration of high-skill occupations in the City of Sydney workforce is driving up the average personal income of city workers, which is 40% higher than the average Sydney Metropolitan worker.

### **Commuting**

- Over one-third of City residents/workers walk to work and 4% work at home.
- Less than one in four City residents/workers use a car to get to work, either as a driver or passenger.
- Just under half of all City households (46.1%) do not own a car. 43.7% own only one car.
- Almost half the city workforce – more than 100,000 workers – commutes to the city by train.
- Just over one-quarter – about 50,000 workers – commute by car, predominantly as the driver.
- Of the remaining one-quarter, approximately one-sixth travel to work by bus and the rest by ferry, taxi, bicycle, foot or some other means.
- Overall, 68.8% of city workers utilise public transport, while 27.4% utilise a private car.

## **Appendix 2 – Fact Sheet Sydney Residents**

Since 1991, the number of people living within the City of Sydney local government area has more than trebled, greatly increasing the vibrancy of the city heart.

### **Population**

- In 1991, for the first time in a century, people began to move back into Central Sydney to live.
- This trend was facilitated by the City of Sydney Council, which from 1991, introduced planning policies to encourage residential development in the city.
- Since then, the City of Sydney's residential population has risen from 7,500 to over 32,500.
- The City of Sydney was the fastest growing local government area (LGA) in Australia for the five-year period 1996-01, averaging 19% per year.
- Prior to the boom, the City of Sydney's residential population had been stagnant or in decline.

### **Demographics**

Data based on enumerated population on Census night, excluding overseas visitors.

- Almost 40% of the City of Sydney residential population is aged between 20 and 35.
- Only 9.3% is aged under 15 and just 8.1% is aged 65 and over.
- 52.2% of the City of Sydney residential population is male and 47.8% female.
- Less than 40% of City residents aged 15 and over are married.
- 36.0% of households in the City consist of one-person only
- Reflecting the City's growing student population, the majority of city residents (59.6%) live in non-family households, including group households

### **Place of Birth**

- The City of Sydney's tremendous diversity stems from the fact that more than half its residents (55.9%) were born overseas.



- The largest groups of migrants to the City of Sydney are those born in China (10.7%) and Indonesia (8.1%).
- Migrants from the United Kingdom account for just 7%, the third largest group.
- A considerable proportion of young migrants to the city are overseas students.

### **Languages Spoken**

- 41% of city residents aged 5 and over can speak a language other than English.
- The most common second language is Chinese. Almost one-in-five city residents (17.9%) speak one of the various Chinese dialects, with Cantonese the most common dialect (9.3%), followed by Mandarin (7.4%).
- Four of the top five languages spoken in the City of Sydney are Asian with almost one-third (30.1%) of the residential population proficient in them.
- With such a high proportion of city residents able to speak second languages, it is not surprising that Sydney has emerged as a popular regional headquarters for international call centres, particularly those dealing with Asia.

### **Religion**

- More than one-quarter of City of Sydney residents (26.2%) do not claim to belong to an organised religion.
- 15% of city residents belong to non-Christian religions, with Buddhism the third most common religion in the city, accounting for 10.8%, having grown from 6.9% in 1996
- Catholicism is the most common religion in the city at 26.3%.

### **Education**

- Nearly 30% (29.6%) of city residents are enrolled in study.
- Of new residents to the city between 1996 and 2001, nearly one-third was full-time students attending a post-secondary educational institution. This continues the trend evident between 1991 and 1996.
- Of the City of Sydney residents age 15 and over, 55.9% possess a post-school educational qualification.

- Of these, over one-in-three (35.9%) hold a qualification in Management and Commerce and 7.9% in Information Technology.

#### **Work**

- 72.8% of City of Sydney residents are in the workforce.
- Nearly one half (47.5%) of city residents are employed in high skill occupations, classified as managers, administrators or professionals.
- Of those who responded, over 60% use a computer at home and 75% use the Internet, although only 45% at home.
- One quarter of residents (24.7%) work in the Property and Business Service Industries. 11.4% work in Finance, 10.6% in Accommodation, Cafes and Restaurants, and 10.2% in Retail.

### **Appendix 3 - Fact Sheet – Sydney Commerce**

The City of Sydney is not only a beautiful and vibrant place, but also a thriving and innovative centre for commercial enterprise.

#### **Economic Performance**

- Between 1994 and 2001, the City of Sydney's economic growth rate was more than 5% - that's 1% above the Australian average.
- Given the 1997 Asian financial crisis, this performance is all the more remarkable.
- The city's economic success was not limited to income growth – its unemployment rate at the end of 2002 was 4.9%, a full 1.0% beneath the national average (6.0%).
- The city economy is becoming increasingly specialised in financial and business services, information technology and telecommunications (IT&T) and retail.

#### **National Headquarters**

- Sydney accounts for more than one-quarter (25%) of Australia's total economic activity.
- Sydney is headquarters to Australia's main financial institutions, the Reserve Bank of Australia, the Australian Stock Exchange and the Sydney Futures Exchange.

- More than 90 commercial and merchant banks are headquartered in the CBD.
- Of the nation's top 100 companies, 60% are headquartered in greater Sydney, most within the CBD itself.
- Two thirds of Australia's banking and finance industry business, almost three-quarters of financial services and nearly half of Australia and New Zealand's top 500 companies are located in Sydney. Sydney has more than twice the international flight departures and two and half times the departures to Asia per week than Melbourne.

### **Regional Headquarters**

- Sydney is regional headquarters to around 500 global corporations operating in the Asia Pacific region. This represents more than 60% of the national total.
- Just under 60% of these global corporations are based in the United States, 15% in the United Kingdom and a further 5% each in Germany and Canada.
- Significantly, one third (33%) are in the IT industry.
- Multinationals to have made Sydney their base for their Asia Pacific headquarters include American Express, British Aerospace, Coca-Cola Amatil, SITA, Krone, State Street Bank, Unilever and H.J. Heinz.
- IT&T companies with regional headquarters in Sydney include IBM, Microsoft, Oracle, Sun Microsystems, Compaq, Philips, SAP, Novell, AT&T, AAPT, Vodafone and Optus Cable & Wireless.
- In the recent past, Royal Bank of Canada, Western Union Financial Services, Mastercard International and Deutsche Asset Management have relocated their regional headquarters to Sydney.

### **The Financial Sector**

- In 2002, the ASX ranked 12<sup>th</sup> internationally in terms of size and 19<sup>th</sup> in terms of turnover.
- In 2001, the SFE was the second largest financial futures and options exchange in the Asia Pacific and the 11<sup>th</sup> largest in the world.

- Approximately half the City of Sydney workforce (47.1%) is employed in financial and business services.
- Nationally, Sydney accounts for:
- Almost four-fifths of all international and domestic banking;
- 34 of the 37 foreign banking groups in Australia;
- 70% of financial services groups in Australia;
- the majority of the 113 investment banks in Australia.

#### **Business and Property Services**

- In the increasingly significant global business services sector, Sydney rates among the top 10 world cities for the provision of finance, accounting, legal and marketing services.
- In 2001, there was a high concentration of legal, accounting and business consultancy firms in Sydney, with such services representing one of the fastest growing sectors of the city economy. Over the past decade, employment in this sector increased by 81%.
- Undoubtedly, this is a flow-on from growth in the city's financial sector.

#### **The IT Industry**

- Between 1986 and 1996, employment growth in computer services in the Sydney metropolitan area grew by 315%. In the City this sector of employment has risen by 80% since 1996.
- In 1999, 70% of the top 100 Australian IT companies were headquartered in Sydney, as were two-thirds of the 50 largest computer software producers.
- 65% of Australia's Internet traffic is carried by NSW-based Internet service providers, making Sydney the national leader in the Internet industry.

#### **The Call Centre Industry**

- In 1999, it was estimated that 85% of all call centres servicing the Asia Pacific region were located in Australia. Within Australia, 50% of these centres were located in Sydney.

- The Australian call centre industry was estimated to be worth almost US\$6 billion, is growing at a rate of 20% per annum and employs more than 160,000 people.
- Growth in Sydney's call centre industry is facilitated by the city's technological capacity as well as its skilled and multicultural workforce.

#### **The Retail Industry**

- In 2001, the City of Sydney continued to experience a retail renaissance, recording Australia's highest retail turnover.
- Retail turnover growth in the city has consistently exceeded both Australian and State rates
- The Pitt Street Mall is Australia's busiest retail strip, boasting a passing trade of 1 million people per week.

**Appendix 4 - Competitors****Tailors**

Floor B2 Norwich House 6  
O'Connell St Sydney NSW 2000  
ph: (02) 9232 3382 Tailors--Men's

250 Pitt St Sydney NSW 2000  
ph: (02) 9267 3382 Tailors--Men's

332-336 Pitt St Sydney NSW 2000  
ph: (02) 9264 5774 Tailors--Men's

Sydney NSW 2000  
ph: (02) 9746 8993 Tailors--Men's

Ground Floor, 17  
O'Connell St Sydney NSW 2000  
ph: (02) 9232 7122 Tailors--Men's

420 Pitt St Sydney NSW 2000  
ph: (02) 9212 1658 Tailors--Men's

66 King St Sydney NSW 2000  
ph: (02) 9299 4744 Tailors--Men's

104 Bathurst St Sydney NSW 2000  
ph: (02) 9267 6775 Tailors--Men's

Suite 405, Lvl 4/ 45  
Market St Sydney NSW 2000  
ph: (02) 9266 0161 Tailors--Men's

428 George St Sydney NSW 2000  
ph: (02) 9231 3705 Tailors--Men's

135 Macquarie St Sydney NSW 2000  
ph: (02) 9247 4943 Tailors--Men's

Level 5 300 George St Sydney NSW 2000  
ph: (02) 9233 6231 Tailors--Men's

428 George St Sydney NSW 2000  
ph: (02) 9233 2006 Tailors--Men's

Shop 127 Strand Arc Sydney NSW 2000  
ph: (02) 9231 2496 Tailors--Men's

75 King St Sydney NSW 2000  
ph: (02) 9279 1356 Tailors--Men's

Ste 4, Level 1, 468  
George St Sydney NSW 2000  
ph: (02) 9267 0427 Tailors--Men's

Room 42, Level 4, 104  
Bathurst St Sydney NSW 2000  
ph: (02) 9267 3260 Tailors--Men's

Level 2 104 Bathurst St Sydney NSW 2000  
ph: (02) 9267 3974 Tailors--Men's

56 Oxford St Sydney NSW 2000  
ph: (02) 9331 3675 Tailors--Men's

**Retailers**

1 O'Connell St Sydney NSW 2000  
ph: (02) 9251 1915 Menswear—Retail

Skygarden Centre Sydney NSW 2000  
ph: (02) 9235 1252 Menswear—Retail

225 Castlereagh St Sydney NSW 2000  
ph: (02) 9261 1539 Menswear—Retail

Shop C20 Skygardens Sydney NSW 2000  
ph: (02) 9223 6729 Menswear—Retail

Shop 201a Level 2/2  
Quay St Haymarket NSW 2000  
ph: (02) 9281 9431 Menswear—Retail

125 York St Sydney NSW 2000  
ph: (02) 9264 6365 Menswear—Retail

144 Goulburn St Sydney NSW 2000  
ph: (02) 9267 2199 Menswear—Retail

Market City Haymarket NSW 2000  
ph: (02) 9211 9118 Menswear—Retail

139 Elizabeth St Sydney NSW 2000  
ph: (02) 9267 9321 Menswear—Retail

64 Castlereagh St Sydney NSW 2000  
ph: (02) 9233 1997 Menswear—Retail

199 George St Sydney NSW 2000  
ph: (02) 9247 0366 Menswear—Retail

245 Pitt St Sydney NSW 2000  
ph: (02) 9267 1855 Menswear—Retail

Sydney Central Plaza Sydney NSW 2000  
ph: (02) 9283 5699 Menswear—Retail

Ground Floor, 17  
O'Connell St Sydney NSW 2000  
ph: (02) 9232 7122 Menswear—Retail

139 York St Sydney NSW 2000  
ph: (02) 9267 1130 Menswear—Retail

Shop R2.16B Market City, 9-13 Hay St  
Haymarket NSW 2000

S325 Mid City Centre Sydney NSW 2000  
ph: (02) 9221 3018 Menswear—Retail

Pedestrian Concourse Sydney NSW 2000  
ph: (02) 9212 1820 Menswear—Retail

Level 1 Shop 54 Strand Arcade 193  
Pitt St Sydney NSW 2000  
ph: (02) 9231 3479 Menswear—Retail

379 George St Sydney NSW 2000  
ph: (02) 9299 5961 Menswear—Retail

145 King St Sydney NSW 2000  
ph: (02) 9221 4994 Menswear—Retail

1 O'Connell St Sydney NSW 2000  
ph: (02) 9241 6875 Menswear—Retail

97 Pitt St Sydney NSW 2000  
ph: (02) 9233 2246 Menswear—Retail

39 Martin Pl Sydney NSW 2000  
ph: 1300 888 828 Menswear—Retail

12 O'Connell St Sydney NSW 2000  
ph: (02) 9232 5755 Menswear—Retail

23- 25 O'Connell St Sydney NSW 2000  
ph: (02) 9232 4255 Menswear—Retail

Shop rg23/ 500  
George St Sydney NSW 2000  
ph: (02) 9266 0244 Menswear—Retail

Queen Vic Building Sydney NSW 2000  
ph: (02) 9261 2588 Menswear—Retail

Shop 6 St James Arcade Sydney NSW 2000  
ph: (02) 9231 6950 Menswear—Retail

Shop 3b Hunter Connection 11- 13  
Hunter St Sydney NSW 2000  
ph: (02) 9223 6368 Menswear—Retail

72 Pitt St Sydney NSW 2000  
ph: (02) 9231 2001 Menswear—Retail

Harbourside Shopping Cntr Darling  
Harbour NSW 2000  
ph: (02) 9280 0066 Menswear—Retail

97 Pitt St Sydney NSW 2000  
ph: (02) 9233 2246 Menswear—Retail

320 George St Sydney NSW 2000  
ph: (02) 9235 0066 Menswear—Retail

177 Elizabeth St Sydney NSW 2000  
ph: (02) 9264 8837 Menswear—Retail

Shop R207 Market City  
Haymarket NSW 2000  
ph: (02) 9281 2180 Menswear—Retail

9/ 2 Chifley Sq Sydney NSW 2000  
ph: (02) 9221 1999 Menswear—Retail

Level 1 Shop 34-36 Queen Victoria Building  
Sydney NSW 2000  
ph: (02) 9283 2260 Menswear—Retail

Royal Arcade/ 255 Pitt St Sydney NSW 2000  
ph: (02) 9283 6201 Menswear—Retail

Shop G51- 53 Grand Walk, QVB  
Sydney NSW 2000  
ph: (02) 9264 2730 Menswear—Retail

Shop 18 Skygarden,  
Pitt St Sydney NSW 2000  
ph: (02) 9223 3840 Menswear—Retail

Shop 2/ 02 9-13  
Hay St Haymarket NSW 2000  
ph: (02) 9212 7154 Menswear—Retail

Grand Walk Queen Victoria Building  
Sydney NSW 2000  
ph: (02) 9264 2730 Menswear—Retail

210 Pitt St Sydney NSW 2000  
ph: (02) 9283 3473 Menswear—Retail

Shop 31 G, Sydney Central Plaza  
Sydney NSW 2000  
ph: (02) 9231 1365 Menswear—Retail

Shop 2 413 George St Sydney NSW 2000  
ph: (02) 9290 3966 Menswear—Retail

Shop C 18 Imperial Arcade Castlereagh St  
Sydney NSW 2000  
ph: (02) 9231 1606 Menswear—Retail

155 George St Sydney NSW 2000  
ph: (02) 9252 9373 Menswear—Retail

Shop 12 LG Sydney Central Plaza Pitt St Mall  
Sydney NSW 2000  
ph: (02) 9223 6580 Menswear—Retail

Pitt St Sydney NSW 2000  
ph: (02) 9264 7485 Menswear—Retail

Westpac Plaza Sydney NSW 2000  
ph: (02) 9251 4011 Menswear—Retail

Shop 23G Sydney Central Plaza  
Sydney NSW 2000  
ph: (02) 9231 2436 Menswear—Retail

141 Elizabeth St Sydney NSW 2000  
ph: (02) 9264 1239 Menswear—Retail

Shop 1 Piccadilly Arcade 210  
Pitt St Sydney NSW 2000  
ph: (02) 9283 2442 Menswear—Retail

333 George St Sydney NSW 2000  
ph: (02) 9299 4986 Menswear—Retail

Shop 10 Wentworth Hotel, Wentworth  
Arcade, 61 Phillips St Sydney NSW 2000  
ph: (02) 9221 2203 Menswear—Retail

Castlereagh Street Level Centrepoint  
Sydney NSW 2000  
ph: (02) 9221 4639 Menswear—Retail

18 Grand Walk Queen  
Victoria Bldg Sydney NSW 2000  
ph: (02) 9261 2168 Menswear—Retail

Shop 103 412-414  
George St Sydney NSW 2000  
ph: (02) 9232 0699 Menswear—Retail

Stand Arcade Sydney NSW 2000  
ph: (02) 9232 1159 Menswear—Retail

Shop G47 Queen Victoria Building  
Sydney NSW 2000  
ph: (02) 9264 4979 Menswear—Retail

455 George St Sydney NSW 2000  
ph: (02) 9283 8111 Menswear—Retail

Shop 7, St Martins Tower 31  
Market St Sydney NSW 2000  
ph: (02) 9262 9551 Menswear—Retail

Level 1 Shop 27- 31 Queen  
Victoria Bldg Sydney NSW 2000  
ph: (02) 9283 6210 Menswear—Retail

Shop G2, 1 Martin Pl Sydney NSW 2000  
ph: (02) 9233 8115 Menswear—Retail

Harbourside Shopping Center Darling  
Harbour NSW 2000  
ph: (02) 9281 0200 Menswear—Retail

Shop G2, 1 Martin Pl Sydney NSW 2000  
ph: (02) 9233 8115 Menswear—Retail

Level 1 Shop 27- 31 Queen  
Victoria Bldg Sydney NSW 2000  
ph: (02) 9283 6210 Menswear—Retail

Chifley Plaza Sydney NSW 2000  
ph: (02) 9233 7967 Menswear—Retail

Strand Arcade Sydney NSW 2000  
ph: (02) 9231 1108 Menswear—Retail

### **Department Stores**

18- 24 Argyle St The Rocks NSW 2000  
ph: (02) 9251 4800 Department Stores

436 George St Sydney NSW 2000  
ph: (02) 9238 9111 Department Stores

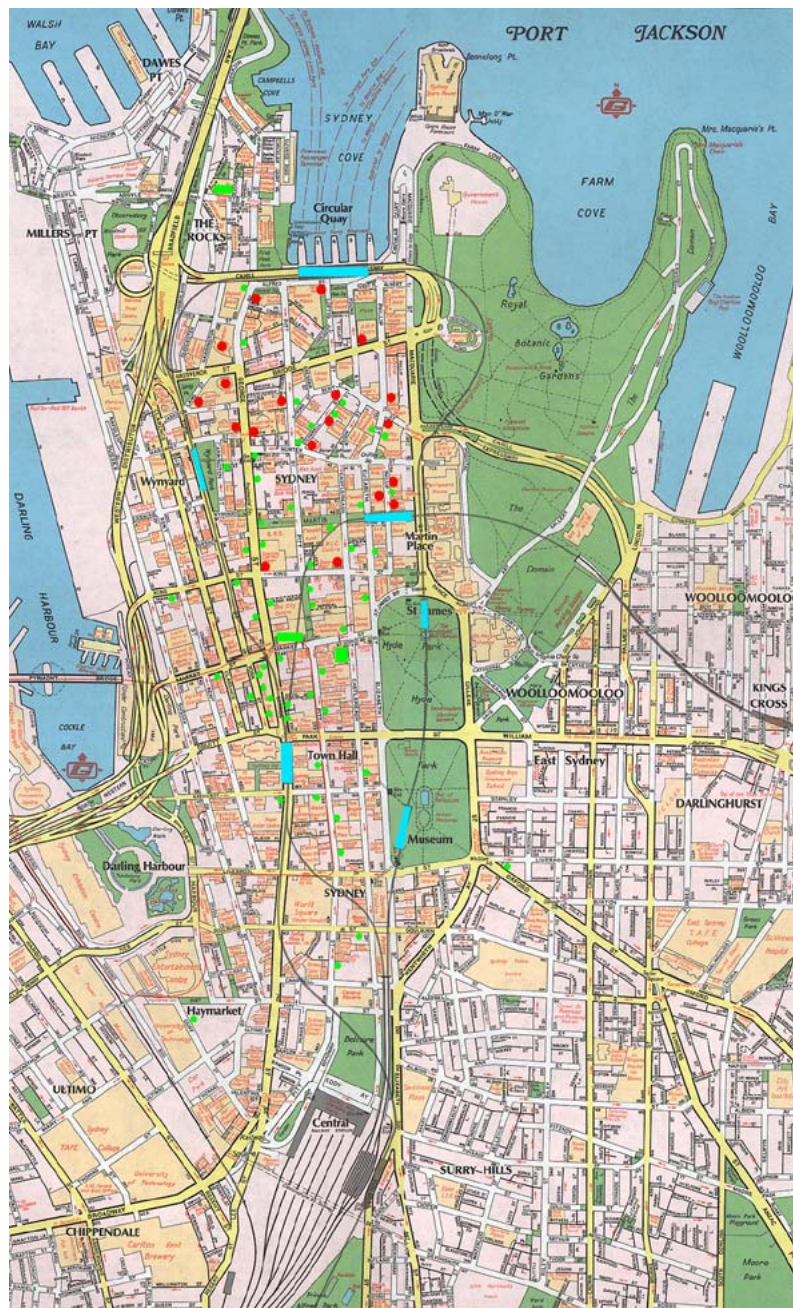
65 -77 Market Street  
Sydney, NSW 2000

Source: Yellow pages Online <http://search.yellowpages.com.au/>  
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## Appendix 5 – Sydney CBD Places of Interest & Trading Area Maps.

### Places of Interest



(©Universal Press Pty Ltd 1990)

#### Major Office Buildings

These are represented by the red dots on the above map and account for the 20 tallest office buildings in the Sydney CBD.

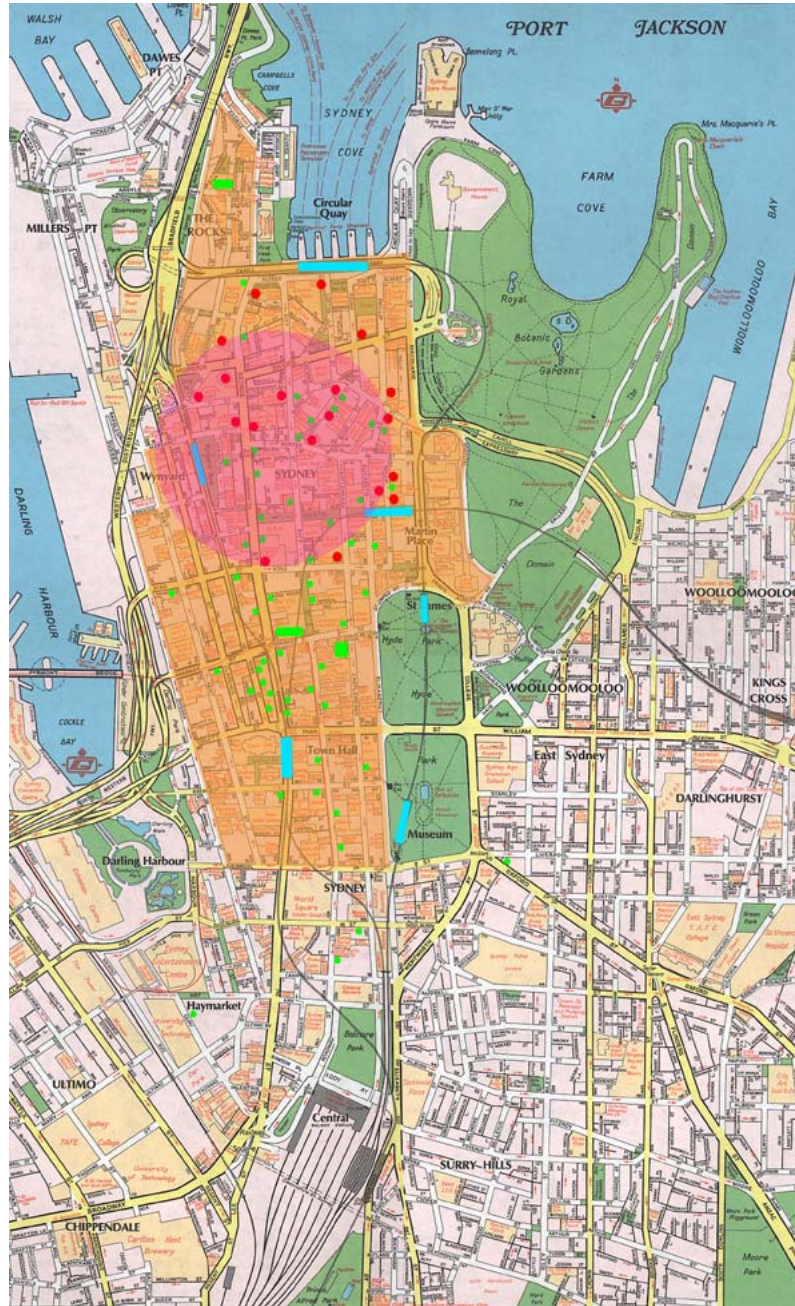
#### Public Transport Hubs

These are represented in blue and cover rail, bus and ferry terminals. Central Station has not been highlighted, while it is a transport hub it services interstate, country and freight services rather than commuter traffic.

#### Competitors

Menswear stores, department stores and Tailors are considered to be competitors. These are represented on the map with green dots.

### Trading Areas



(©Universal Press Pty Ltd 1990)

#### Primary Trade Area

This area is represented by the pink circle and covers an area that can be walked in ten minutes or less from the desired store location of the corner of Pitt and Hunter streets Sydney.

#### Secondary Trading Area

This area is represented by the orange shaded area and is constrained by a number of physical and natural boundaries.

**Appendix 6 – Occupation Business Suit Probabilities Table**

Occupation	Index
11 Legislators and Government Appointed Officials	0.9
12 General Managers	0.9
13 Specialist Managers	0.75
15 Managing Supervisors (Sales & Service)	0.6
16 Managing Supervisors (Other Business)	0.6
22 Building Professionals and Engineers	0.3
23 Health Diagnosis and Treatment Practitioners	0.3
24 School Teachers	0.4
25 Other Teachers and Instructors	0.4
26 Social Professionals	0.4
27 Business Professionals	0.9
29 Miscellaneous Professionals	0.8
31 Medical and Science Technical Officers and Technicians	0.4
32 Engineering and Building Associates and Technicians	0.5
33 Air and Sea Transport Technical Workers	0.5
39 Miscellaneous Para-Professionals	0.5
52 Data Processing and Business Machine Operators	0.4
53 Numerical Clerks	0.5
54 Filing, Sorting and Copying Clerks	0.4
55 Material Recording and Dispatching Clerks	0.4
59 Miscellaneous Clerks	0.4
61 Investment, Insurance and Real Estate Salespersons	0.9
62 Sales Representatives	0.9
63 Sales Assistants	0.6
64 Tellers, Cashiers and Ticket Salespersons	0.5
65 Miscellaneous Salespersons	0.5
66 Personal Service Workers	0.4
<b>Total</b>	<b>0.56</b>

Source: Invented for Illustration purposes only – Alex Cochran<sup>1</sup>

<sup>1</sup> This table and its data have been invented for this assignment. However in a practical situation a table such as this would be constructed using quantitative research.

## Appendix 7 – Estimated Men’s Suit Market by District NSW

SSD Code	Statistical District Name	Total	Potential Targets	Yearly Market
10515	St George-Sutherland	43,844	23,557	12,956
10555	Lower Northern Sydney	37,155	23,650	13,008
10560	Hornsby-Ku-ring-gai	30,276	18,866	10,376
10550	Blacktown-Baulkham Hills	34,464	18,160	9,988
10505	Inner Sydney	28,316	15,751	8,663
11005	Newcastle	31,702	14,249	7,837
10510	Eastern Suburbs	28,713	15,929	8,761
10565	Northern Beaches	27,198	15,406	8,473
10545	Outer Western Sydney	25,669	12,597	6,928
10540	Central Western Sydney	22,638	11,284	6,206
10520	Canterbury-Bankstown	23,039	10,474	5,761
11505	Wollongong	20,578	9,366	5,151
10570	Gosford-Wyong	20,080	8,714	4,793
10535	Inner Western Sydney	16,118	8,875	4,881
10530	Outer South Western Sydney	18,143	8,637	4,751
10525	Fairfield-Liverpool	20,530	8,504	4,677
12010	Richmond-Tweed SD Bal	9,556	3,060	1,683
15010	Central Murrumbidgee	7,000	2,686	1,477
11510	Illawarra SD Bal	7,556	2,680	1,474
12505	Clarence	7,643	2,516	1,384
14005	Bathurst-Orange	5,472	2,362	1,299
12510	Hastings	7,245	2,322	1,277
13010	Northern Slopes	5,189	1,949	1,072
13505	Central Macquarie	5,274	1,904	1,047
11010	Hunter SD Bal	4,946	1,780	979
14505	Queanbeyan	3,414	1,798	989
14510	Southern Tablelands (excl. Queanbeyan)	4,137	1,623	893
13015	Northern Tablelands	4,118	1,472	809
15505	Albury	3,912	1,559	858
14015	Lachlan	3,282	1,033	568
14515	Lower South Coast	3,422	968	532
15015	Lower Murrumbidgee	2,584	955	525
14010	Central Tablelands (excl. Bathurst-Orange)	2,089	827	455
12005	Tweed Heads	2,504	728	400
13020	North Central Plain	1,729	626	345
19999	Unknown NSW	1,099	600	330
15515	Central Murray	1,788	533	293
16010	Far West	1,402	478	263
14520	Snowy	1,304	475	261
15510	Upper Murray (excl. Albury)	1,097	361	198
13510	Macquarie-Barwon	898	267	147
13515	Upper Darling	645	227	125
15520	Murray-Darling	546	151	83
Total		528,312	259,960	142,978

Source ABS Experimental Estimates, Regional Wage and Salary Earner Statistics

## **Appendix 8 - Sydney's Tallest Buildings**

1. Citigroup Centre
2. Chifley Tower
3. MLC Centre
4. Governor Phillip Tower
5. Aurora Place
6. AMP Centre
7. AAP Centre
8. Century Tower
9. Grosvenor Place
10. Australia Square Tower
11. 1 O'Connell Street
12. The Peak
13. 201 Elizabeth Street
14. Gateway Plaza 10
15. HSBC Centre
16. Capita Centre
17. Horden Towers
18. Sydney Central
19. Angel Place
20. State Bank Centre
21. Governor Macquarie Tower
22. Authur Anderson Centre
23. Quay West Apartments
24. The Tower
25. Telstra Plaza
26. Bankers Trust Tower
27. Park Regis Apartments
28. Westpac Plaza
29. St Martins Tower
30. British Telecom Tower 1
31. NRMA House
32. Marriot
33. AON Centre
34. ANA Harbour Grand Hotel
35. Mulpha House
36. National Australia Bank Building
37. KPMG Centre
38. Nestlé Tower 39. IBM Centre
40. Le Meridien Hotel

Source: [WWW.Skyscrapers.com](http://WWW.Skyscrapers.com)