



# *Australian foodservice*



{ *A continuous information service* }

# Australian Foodservice

**Australian Foodservice** addresses key trends, developments and drivers within a highly dynamic industry as well as providing detailed market size estimates down to product and channel level.

Our annual reports comprise three main modules:



**BIS Foodservice** provides a two year subscription during which time subscribers have on-line access to our foodservice database including market size estimates, yearly reports, latest market forecasts and Foodservice Symposia presentations as well as hard copy reports.

**Australian Foodservice** comprises **two** reporting occasions:

Every **November** ■ Every **May**

Over a **two** year subscription period **Australian Foodservice** addresses:

## November

General foodservice trends and developments  
Regional foodservice market conditions  
BIS Foodservice Confidence Index  
R&G Coffee Barometer  
Market Prospects and Outlook  
Individual Channel Characteristics & Market Drivers  
Product & Customer Service Requirements  
The Importance of Sales & Distributor Representatives  
Tracking of Major Distributor Reputation  
Tracking of Internet Usage in the Foodservice Market  
Healthy Eating in Foodservice

*Brand Analysis & Awareness  
Communication & Promotion in Foodservice*

*Packaging in Foodservice  
Distribution & Supplier Choice in Foodservice*

## May

*The Foodservice Consumer – Tracking Study*

- Eating Out Preferences & Trends
- Eating Out Occasions ■ Cuisine Trends ■ Average Spend per Meal
- The Economic Environment's Impact on Eating Out ■ Other Topical Issues

*Market Forecasts*

© **Think foodservice, not retail**

# Market size database

**BIS Foodservice** consistently refines both our methodology for data gathering as well as analysis models for reaching well founded market estimates.

We also work with major foodservice distributors to validate our estimates.

Clients have on-line access to our **market size database** which contains:

- Market size estimates down to product and channel/segment level in the commercial and institutional sectors
- The database allows for market share indications
- The database also allows for currency manipulation
- Number of outlets by sector and channel
- Number of meals served by meal segment and channel



## BIS Foodservice Symposium

The outlook for the Australian foodservice market

**Every May Sydney • Melbourne**

As part of the subscription, clients are invited to our annual half day symposium when we report on the latest developments, trends and drivers in the Australian foodservice market. Clients will also have the opportunity to meet various industry specialists as speakers, and hear BIS Shrapnel's latest economic forecasts from our economists.

# The Australian Foodservice Market

**The Australian foodservice market** is valued at around AUD\$30 billion at consumer prices. Foodservice operators' expenditure on food and non-alcoholic beverages accounts for about one third of this value.

Australians have made eating out a way of life, and today spend 42% of their food budget on eating out of home. The propensity to eat out has climbed steadily over the last decade, and even during economic downturns, Australians do not stop going out for meals, but instead trade down.

The Australian foodservice market is vibrant and sophisticated and offers a unique choice of various cuisines and eating experiences in cities as well as regional areas.

## Institutional Sector

HEALTH

EDUCATION

MILITARY

CORRECTIONAL

WORKPLACE CANTEENS

CHARITABLE ORGANISATIONS

## Commercial Sector

FULL SERVICE RESTAURANTS (FSR)

HOTELS/MOTELS/PUBS

CAFÉS

FAST FOOD (QSR)

SNACK FOOD

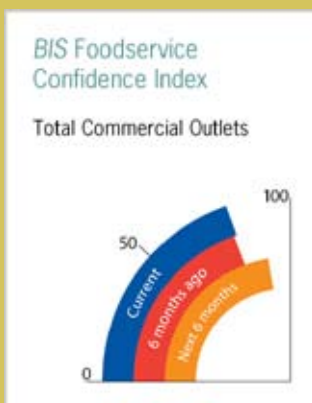
CATERERS

CLUBS

FUNCTION CENTRES

SPORTING VENUES

## BIS Foodservice Confidence Index



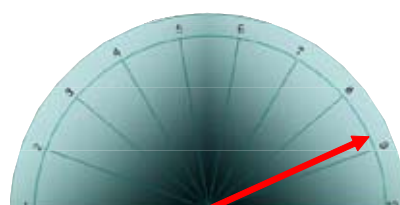
BIS Foodservice Confidence Index gauges the general business sentiment and confidence level among a cross section of commercial foodservice operators.

## Roundtable discussions with clients

In July every year we hold Roundtable discussions in Sydney and Melbourne with our clients in order to understand areas of particular interest to the industry in terms of current foodservice research needs and objectives.

## R&G Coffee Barometer

R&G Coffee Barometer captures and explains, in one figure, the development phase of the café and R&G coffee culture in the foodservice market.



## Brand Analysis

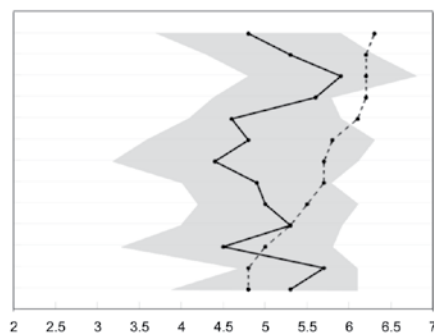
The **brand analysis** gives detailed information on each brand's position and performance in the market as perceived and rated by both commercial and non-commercial foodservice operators within each channel. It also indicates the importance of each brand selection criteria.



Brand positioning maps

The **brand analysis** will be presented using **Brand Positioning Maps** or **Gap Charts** as pictured below.

Reputation of brand  
Quality of product  
Stock availability  
Price/value for money  
Product range  
Quality of packaging



Gap charts

These **brand selection criteria** include:

- Reputation of brand
- Quality of brand
- Price/value for money
- Innovative products
- Product range
- Service by sales representatives
- Stock availability
- Delivery terms
- Specific sales promotions & support
- Quality of packaging

## Research Methodology

**Australian Foodservice methodology includes:**

- › Qualitative face-to-face interviews by *BIS Foodservice* consultants
  - › 1,300 quantitative interviews
  - › 1,200 consumer interviews
- › Secondary research including proprietary databases
  - › Extensive analysis

## BIS FOODSERVICE

BIS Foodservice is a business unit within BIS Shrapnel. For the last 25 years we have provided research and analysis into the foodservice industry drawing on our two core competencies:

- ▶ *Market research & market intelligence*
- ▶ *Forecasting*

BIS Foodservice runs continuous information services in Australia and New Zealand as well as in-depth country reports in another 14 markets in Asia and The Middle East.

For further details about our business and studies please visit our website: [www.bis.com.au](http://www.bis.com.au) (click on Foodservice).

### **Inquiry & consultancy facility**

Our consultants are continually available to clients who want to discuss trends, developments and market estimates. We are contactable via telephone and email and will seek to facilitate face-to-face meetings whenever possible.

### » CONTACTS

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