



Fast Food in Australia 2009

In what way is the fast food market changing in Australia?

And how does this compare to overseas markets?

How do consumers rate fast food chains?

How is the current trend towards healthy eating impacting fast food options?



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BIS Shrapnel is introducing Fast Food in Australia 2009

The fast food market in Australia has experienced a vigorous growth over the last decade as Australians are making eating out a way of life. In total, an estimated 1.64 billion meals and takeaways were served by fast food chains and independent outlets during 2007. This accounts for 44% of all meals served in the commercial foodservice sector. There are almost 17,000 fast food outlets throughout Australia – representing 28% of all commercial foodservice outlets.

The fast food market has progressively changed over the years with the market being influenced by overseas trends as well as more uniquely developed Australian eating out preferences. The increased popularity of chain outlets at the expense of independent fast food operators seems to hold up while there are shifts in the popularity of various fast food alternatives.

Fast Food in Australia 2009 will seek to uncover Australians' total fast food consumption and their fast food preferences.

The report will address key trends and developments in this significant market segment within the Australian foodservice market, key market drivers, consumer profiles, chain ratings and growth prospects.

For the past 25 years, BIS Shrapnel has conducted in-depth research, analysis and forecasting of Australia's food and beverage markets. The research also includes studies in 20 overseas markets in New Zealand, Asia, The Middle East and Europe.



Fast Food Categories

Main fast food and takeaway categories covered by the report:

- Hamburgers
- Chicken
- Fish
- Pizza
- Hot dogs
- Bakery items
 - Pies
 - Sausage rolls
 - Pasties
- Sandwiches
- Snack foods
 - Donuts
 - Muffins
 - Ice cream/sundaes
 - Yoghurt
- Hot chips
 - Other potato products
- Ethnic
 - Chinese
 - Thai
 - Italian
 - Lebanese
 - Middle Eastern (Kebab, Falafel)
 - Indian
 - Other Asian
 - Mexican
 - Noodles
 - Sushi
- Vegetarian
- Salads
 - Fruit
 - Vegetables
- Soup



The Australian fast food market

Fast Food in Australia 2009 will address key trends and developments in the fast food market as well as main market drivers. We will also examine the Australian market in view of fast food developments taking place in overseas markets such as Europe and the United States over the past decade and the potential impact on the Australian market.

Increased obesity among children and adults alike does already impact the fast food market, and is likely to have further bearing on eating out habits and trends in the near future. To what extent do Australians care about healthy eating when consuming fast food and takeaways? Do their concerns translate into changing habits and menu choices?

What fast food and takeaway do Australians eat?

For each of the fast food categories, the study will explore:

- Various fast food preferences
- Amounts consumed in an average week and an average month
- The time of day when fast food and takeaway is consumed
- The type of outlet used
- Takeaway versus on premise consumption
- Meal occasion

Who is the consumer?

Consumer profiles within each fast food category

Fast Food in Australia 2009 will establish consumer profiles within each main fast food category consisting of key demographics such as age, gender, household income as well as life cycle stages.

Different types of fast food consumers – Cluster analysis

We will conduct cluster analysis to identify different types of fast food consumers. Each group will be identified by a set of key characteristics.

Consumer assessment of fast food chains and independent fast food outlets

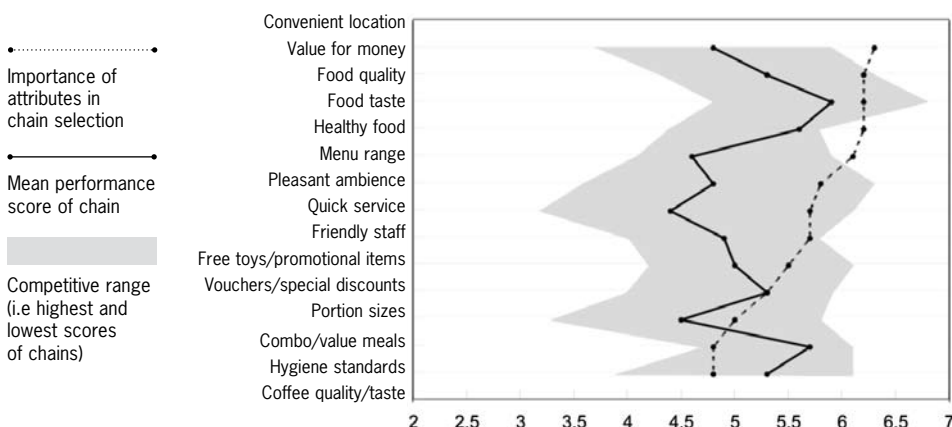
What are the important factors when consumers choose which fast food/café chain to visit?

What are the attractions of independent fast food outlets?

In this section the importance of various attributes and selection factors are determined. Then consumers will rate the fast food chain and/or independent fast food outlet frequented most often on the same attributes. Key attributes/selection criteria will include:

- | | |
|-----------------------|-------------------------------|
| ■ Convenient location | ■ Friendly staff |
| ■ Value for money | ■ Free toys/promotional items |
| ■ Food quality | ■ Vouchers/special discounts |
| ■ Food taste | ■ Portion sizes |
| ■ Healthy food | ■ Combo/value meals |
| ■ Menu range | ■ Hygiene standards |
| ■ Pleasant ambience | ■ Coffee quality/taste |
| ■ Quick service | ■ Known & trusted |

Based on this quantitative information gap analysis charts will be developed for the major chains and independent outlets as a group.



Methodology

The methodology for this report includes three main modules:

Desk research

BIS Shrapnel has extensive and proprietary databases of the Australian food and beverage markets built up over the past 25 years, including market sizing.

Our information specialists will also access a number of secondary on line sources and industry and market data.

Quantitative research

The quantitative survey will have a sample size of 1,200 consumers.

The sample will have national representative coverage.

All interviews will be conducted by a leading research agency using a structured questionnaire.

Analysis & reporting

All qualitative and quantitative information will be analysed in a team approach.

The final report will be user-friendly and succinct with the information and analysis presented in point form using graph and colour presentations.



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.

Brand Awareness

Advertising Awareness

We will determine advertising recall of the major fast food chains and explore the most memorable advertisements in print media, radio and television over a six month period.

Fast Food Chains & Independent Outlets

Fast Food in Australia 2009 will chart the total number of:

- Outlets by *chain* and by state
- Independent outlets by type and by state

Market size

We will establish total market size for each main fast food category by:

Value at consumer prices

Volume consumed

The market size will also be broken down by:

Channel

Demographics

State

The main fast food categories will include:

- | | | |
|--------------|----------------|--------------|
| – Hamburgers | – Bakery items | – Vegetarian |
| – Chicken | – Sandwiches | – Salads |
| – Fish | – Ethnic | – Soup |
| – Pizza | – Snack foods | – Ice cream |
| – Hot dogs | – Hot chips | – Pies |

Subscribers will have direct access to our market size database by an authorisation code and can access relevant data and estimates at any time. The database will allow for subscriber market share estimations.

Growth prospects

- **Challenges and opportunities** will be analysed for each main fast food category.
- We will also identify the **growth prospects** for each fast food category.

The analysis will be enhanced using mapping techniques to present the current fast food market as well as growth prospects.

COSTS & TIMING

The report will be available end of February 2009.

The cost (excl. GST) is **A\$9,500**

GST applies to Australian based companies.

Our standard payment plan is:

- 50% of subscription on ordering
- 50% when the report is published

A subscription order form is enclosed with this proposal.

About Us

BIS Shrapnel has provided research, analysis and forecasts on the foodservice industry for over 25 years. BIS Foodservice runs continuous information services in Australia and New Zealand as well as in-depth country reports on another 20 foodservice markets in South East Asia, China region, The Middle East and the Nordic markets.

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

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Subscription

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\$9,500 (plus GST)

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Total: _____

Each subscription includes one hard copy of the report and online access.

Price is exclusive of GST. GST applies to Australian based companies.

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