



The Barbecues Market in Australia 2009



APPLIANCES AND POWER TOOLS

1. BACKGROUND

BIS Shrapnel is producing the fifth edition of our barbecues report, *The Barbecues Market in Australia*, to meet the market information needs of a product category that lacks good quality market data.

The earlier editions of this study were published in 2001, 2003, 2005 and 2007.

The 2009 edition will include several new sections, including a continuation of the gas patio heater analysis that we launched in 2007 (and was well received by clients).

BIS Shrapnel has been analysing and monitoring household appliance markets in Australia for 25 years through private and multi-client studies. This study builds on our experience and expertise in analysing these markets.

2. METHODOLOGY

The consumer survey will be conducted via an online survey of 4,000 Australian households; this sample base allows us to obtain a detailed picture of consumers' purchasing behaviour. Results are then weighted up to reflect Australia's 7.7 million households.

The sample structure will reflect the distribution of the population. Interviews will be conducted in Sydney, Melbourne, Brisbane, Adelaide, Perth and regional areas of the eastern states.

This survey will establish the incidence and number of the various barbecues being purchased, along with responses to a series of attitudinal questions regarding these purchases.

3. ONLINE RESEARCH

Online research is a cost effective, thoroughly researched and valuable resource for conducting consumer research. Our fieldwork supplier has exclusive access to over 50,000 Australian households.

Respondents are sampled in gender, age and geographic proportions relative to the greater population (as per telephone surveys). The online community is refreshed and managed to ensure quality maintenance and data is continually validated to ensure ongoing integrity.

BIS Shrapnel has used online research for several large-scale syndicated projects that have previously been undertaken via telephone; the results reveal:

- Minimal variation between the methodologies

Coupled with further online benefits of:

- Shorter fieldwork periods
- Faster access to data, and
- A more efficient and flexible approach.

4. MARKET COVERAGE

The study will be presented in one volume, which will cover the following products:

- Gas barbecues
- Solid fuel barbecues
- Electric barbecues
- Patio heaters snapshot.

5. SCOPE OF THE REPORT

The report will build upon previous editions with time-series presentation across appropriate sections.

Key segments include:

Market Overview...

- Market size estimates
- Household penetration
- Market segmentation (gas, solid fuel and electric)
- Purchase motivation , including:
 - First time versus replacement purchasers
 - Age of replaced barbecue
- Features and accessories analysis, including:
 - Cooking plates
 - Weather cover
 - Cooking tools
 - Hood or flat top
- Use of barbecue outside the home (***new for 2009 report***)
- Extent of pre-purchase research
- Retailer influence in brand choice (***new for 2009 report***)
- Price analysis

Power source issues...

- Bottles versus mains connection
- Swap scheme versus refill
- Normal gas supplier
- Reasons for choosing gas, electric or solid fuel

Cooking analysis...

- Frequency of use
- Use of roasting and covered cooking features

Brand Analysis...

- Market share of leading brands
- Initial brands in mind
- Purchase incidence of initial brand in mind
- Drivers of brand selection
- Demographics (consumer age, household income and household structure)

Brand Perceptions and Ratings

- Perception ratings of leading brands by:
 - Quality
 - Value for money
 - Design/features;
 - Innovation; and
 - Contemporary/modern (*new for 2009 report*)
- Most desirable brand (*new for 2009 report*)
- Perception of brand market position (*new for 2009 report*)

Brand Satisfaction/Performance...

- How is new barbecue performing (*new for 2009 report*)
- Respondents rate their new barbecue in terms of:
 - Retailer advice at point of sale
 - Ease of assembly
 - Ease of cleaning

Retailer analysis...

- Place of purchase analysis
- Price paid by place of purchase

Patio heaters...

- Segment (gas, electric, solid fuel; free-standing, table-top)
- Year of purchase
- Place of purchase
- Price paid

6. SPECIAL QUESTIONS

Early-bird subscribers can ask questions specific to their own needs, to take advantage of the significant economies of scale.

If such information is of general interest or requested by a number of subscribers, it may be incorporated in the report (conditional on available questionnaire space).

Should subscribers prefer confidential questions a higher price will be charged.

7. PRESENTATION

The survey results will be presented in a user friendly report; all clients receive two hard copies and a PDF electronic version.

8. COST AND TIMING

BIS Shrapnel plans to commence the fieldwork for this study in mid March 2009. We expect the report to be published in late May 2009.

If subscribers require specific information prior to publication, we will meet these needs wherever possible.

Companies who subscribe by Friday 13 March will receive a substantial discount.

Given the global financial crisis, we have decided to maintain our 2007 subscription prices:

	Early Bird Price A\$ By Fri 13 March	Standard Price A\$ From Mon 16 March
<i>The Barbecues Market in Australia, 2009</i>	\$11,000 + GST = \$12,100	\$13,000 + GST = \$14,300

9. BIS SHRAPNEL

BIS Shrapnel Pty Limited is Australia's largest independent business research and forecasting company. We offer an unmatched combination of strengths: economic analysis and forecasting, coupled with marketing intelligence gathering and analysis. For further details visit the BIS Shrapnel website at: www.bis.com.au.