# Foodservice Research

## Autumn 2019: March-May

June 2019 Report

# Out-of-home meals – How many?

Autumn 2019: March-May

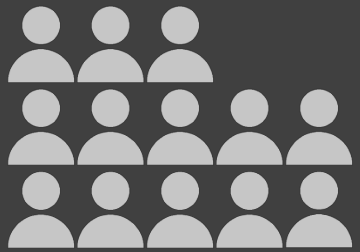
Total of **3,140** out-of-home meals

| | Lunches | Dinners | Total |
|---|---|---|---|
| Takeaway/ delivery | 772 | 810 | **1,582** takeaway/delivery meals |
| Dine out | 836 | 722 | **1,558** meals eaten at the outlet |
| Total | **1,608** lunches | **1,532** dinners | **3,140** out-of-home meals |

# Eating out rates

*most recent lunch and dinner*

*amongst all respondents; screened and qualified (n=2,983)*



# Eat-out rate Summary

## Autumn 2019: March-May

Based on all respondents including qualified and screened (i.e. total population) (n=2,983)

### Overall eat-out rates

The recorded eat-out rate has decreased from 28% to **27%** in autumn, continuing to trend downwards since the high in winter '18, and even higher levels previously.

Overall eat out rates are **up** amongst:

- ▲ ACT residents
- ▲ Non-metro areas

Overall eat out rates are **flat** amongst:

- – SA residents.
- – Women
- – 35-49 year olds

Overall eat-out rates are **down** amongst:

- ▼ QLD, VIC, WA, TAS, and NSW residents
- ▼ Metro areas.
- ▼ Adult households (particularly older couples)
- ▼ Families
- ▼ Men
- ▼ 18-34 year olds, 50+ year olds

### Lunch eat-out rates

Eat-out rate for lunch has continued to trend downwards to **18%** for autumn '19.

Rates are **down** amongst:

- ▼ NSW, VIC, QLD, SA, WA, ACT and TAS.

### Dinner eat-out rates

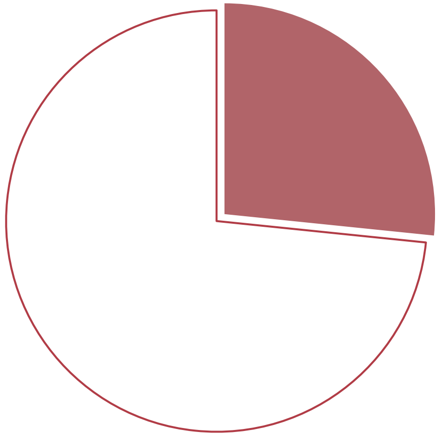
The dinner eat-out rate has dropped considerably further to **16%.**

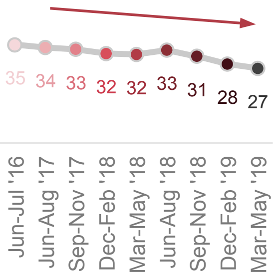
Rates are **up** amongst:

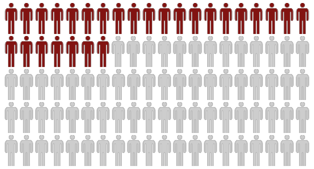
- ▲ QLD, SA, and ACT.

Rates are **down** amongst:

- ▼ NSW, VIC, WA, and TAS.



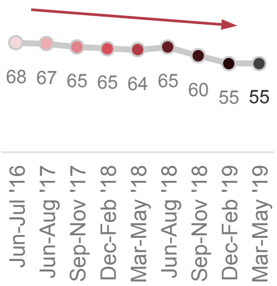


## Autumn 2019: March-May

# 27% of the population ate out of home* for lunch or dinner on any given day

– continuing to trend downwards since the momentary high in Winter ‘18




**55%** of the population have been eating out of home for lunch or dinner at least once *over a 3 day period* during autumn. Though consistent with the previous, summer quarter, a longer-term decline is still evident.

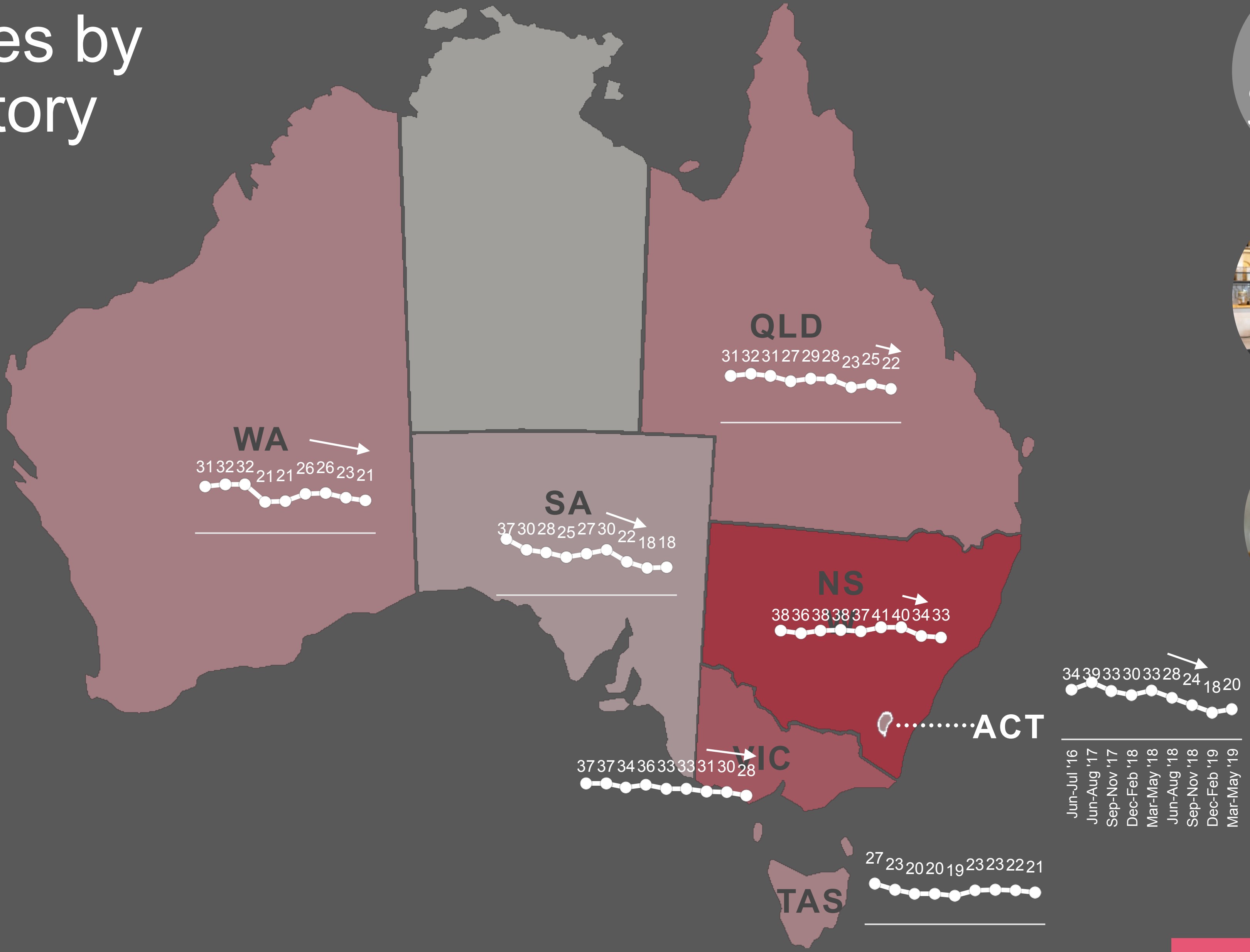
Base: Total population: Jun-Aug ‘17 (n=2,425), Sep-Nov ‘17 (n=2,455), Dec-Feb ‘18 (n=2,560), Mar-May ‘18 (n=2,641), Jun-Aug ‘18 (n=2,716), Sep-Nov ‘18 (2,941), Dec-Feb ‘19 (3,177), Mar-May ’19 (n=2,983).
*”Eating out of home” means a meal purchased take away / home delivery, or eaten at a restaurant / café / food outlet.

# Eat-out Rates by State / Territory

**31%**
*Overall population*
***Jun '17 – May '19***

*Eat-out rates have **dropped** in a number of states and territories during Autumn 2019, namely: QLD, VIC, WA, TAS and NSW; while the rate has actually picked up slightly in the ACT and been consistent in SA, after heavy declines in both of these regions previously.*

*After mostly **resisting** declines in the eat-out rate since mid-2016, it appears **NSW and VIC** have now shown signs of decline.*




35
30
25
20
15
% Out-of-home eating rates

Base: Total population: Jun-Jul '16 (n=9,389); Jun-Aug '17 (n=2,425); Sep-Nov '17 (n=2,455); Dec-Feb '18 (n=2,560); Mar-May '18 (n=2,641); Jun-Aug '18 (n=2,716), Sep-Nov '18 (n=2,941), Dec-Feb '19 (n=3,177), Mar-May '19 (n=2,983).
Mar-May '19: NSW (n=664), VIC (n=692), QLD (n=632), SA (n=373), WA (n=343), ACT (n=96), TAS (n=117).

AUSTRALIAN Pork
THRIVE INSIGHTS

# Eating out rates: lunch vs dinner

Autumn 2019
March-May

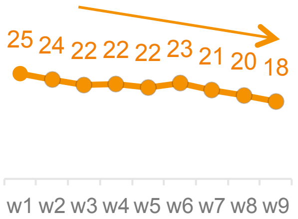
# OCCASIONS:

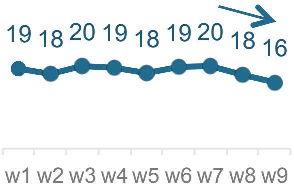
## LUNCH VS. DINNER


*The number eating out for lunch on any given day has declined further during Autumn.*

*The recent decline in eat-out rate during dinner has also continued in Autumn.*

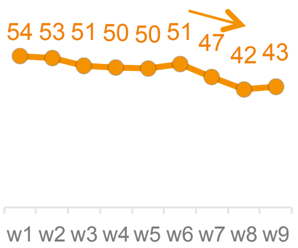

**18%** of Australian adults ate out of home* for **lunch** on any given day during autumn.

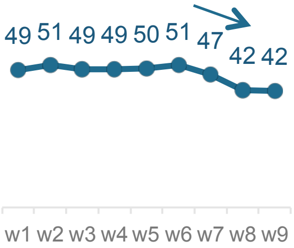



**16%** of Australian adults ate out of home* for **dinner** on any given day during autumn.

43% of the population ate out of home for lunch at least once in the *last 3 days*.




42% of the population ate out of home for dinner at least once in the *last 3 days*.

| w1 | w2 | w3 | w4 | w5 | w6 | w7 | w8 | w9 |
|---|---|---|---|---|---|---|---|---|
| Jun-Jul '16 | Jun-Aug '17 | Sep-Nov '17 | Dec-Feb '18 | Mar-May '18 | Jun-Aug '18 | Sep-Nov '18 | Dec-Feb '19 | Mar-May '19 |

Base: Total population: Jun-Jul '16 (n=9,389); Jun-Aug '17 (n=2,425); Sep-Nov '17 (n=2,455); Dec-Feb '18 (n=2,560); Mar-May '18 (n=2,641); Jun-Aug '18 (n=2,716), Sep-Nov '18 (n=2,941), Dec-Feb '19 (n=3,177), Mar-May '19 (n=2,983).
*"Eating out of home" means a meal purchased take away / home delivery, or eaten at a restaurant / café / food outlet.

# Lunch & Dinner eat-out rates – by State

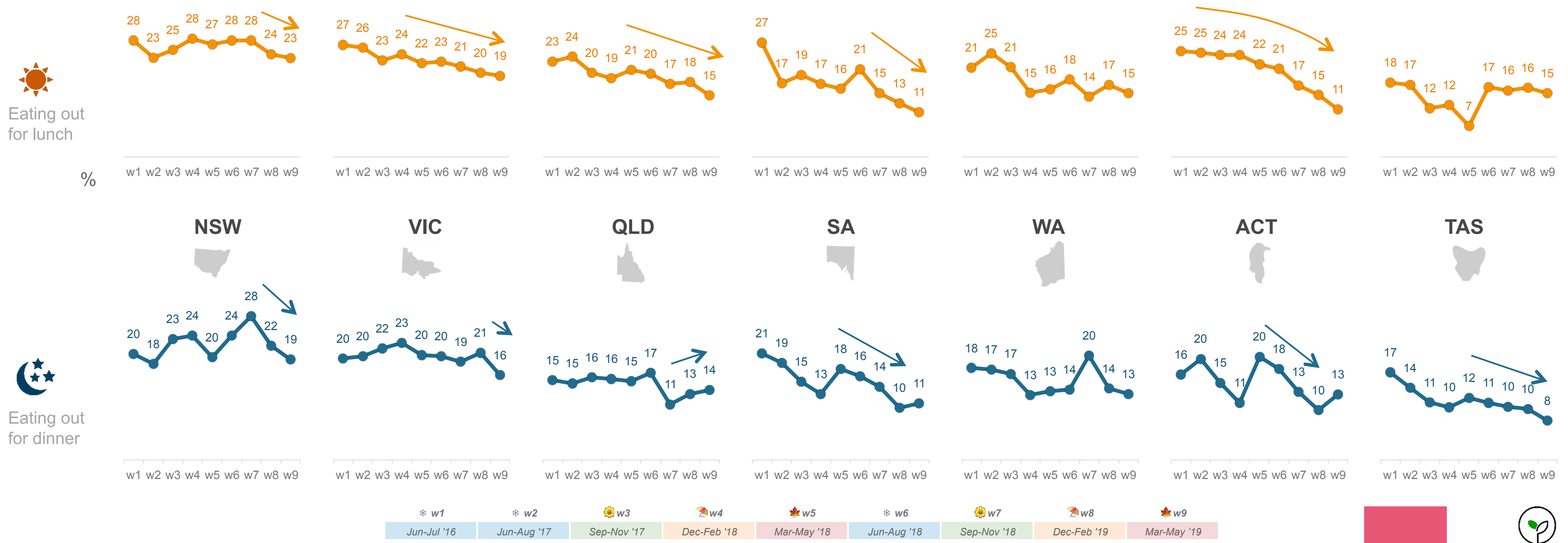
**21%** Population Jun '17 – May '19 LUNCH

**18%** Population Jun '17 – May '19 DINNER

*Proportion that purchased most recent lunch OR dinner out of home (takeaway OR at restaurant/ outlet)*

*Corresponding with the decline in the overall nationwide eat-out rate, **ALL** states and territories have posted reduced levels of eating out for **lunch**, while eating out for **dinnertime** occasions has also decreased in NSW, VIC, WA and TAS.*

*After resisting a decline, **NSW** appears to be finally showing signs of kerbing its eat-out behaviour, with **two consecutive seasons of decline** for both lunches and dinners.*

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NSW (n=664), VIC (n=692), QLD (n=632), SA (n=373), WA (n=343), ACT (n=96), TAS (n=117).



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# Takeaway & Dine-out rates – by State

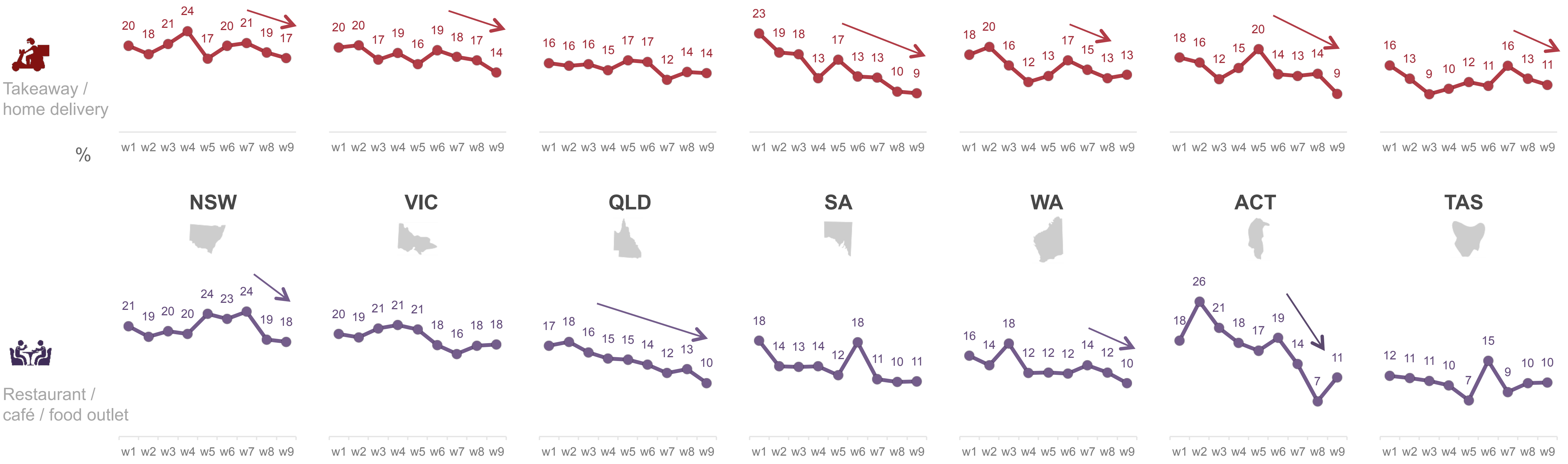
17%
Population
Jun '17 – May '19
Takeaway/home-delivered

17%
Population
Jun '17 – May '19
Restaurant/café/outlet

*Proportion that purchased most recent lunch OR dinner out of home (takeaway OR at restaurant/ outlet).*

*For autumn, **takeaway / home-delivery** rates show a greater decline in the two most populous states, **NSW and VIC** (versus restaurant / café rates). Reduced takeaway and home delivery has also occurred this season in the ACT, TAS, and SA.*

***Restaurant / café** foodservice rates have also softened, particularly in **QLD** and **WA**, but also in NSW.*




| w1 | w2 | w3 | w4 | w5 | w6 | w7 | w8 | w9 |
|---|---|---|---|---|---|---|---|---|
| Jun-Jul '16 | Jun-Aug '17 | Sep-Nov '17 | Dec-Feb '18 | Mar-May '18 | Jun-Aug '18 | Sep-Nov '18 | Dec-Feb '19 | Mar-May '19 |

Base: Total population: Jun-Jul '16 (n=9,389); Jun-Aug '17 (n=2,425); Sep-Nov '17 (n=2,455); Dec-Feb '18 (n=2,560); Mar-May '18 (n=2,641); Jun-Aug '18 (n=2,716), Sep-Nov '18 (n=2,941), Dec-Feb '19 (n=3,177), Mar-May '19 (n=2,983).
NSW (n=664), VIC (n=692), QLD (n=632), SA (n=373), WA (n=343), ACT (n=96), TAS (n=117).



AUSTRALIAN Pork THRIVE INSIGHTS

# Eating out rates: demographic differences

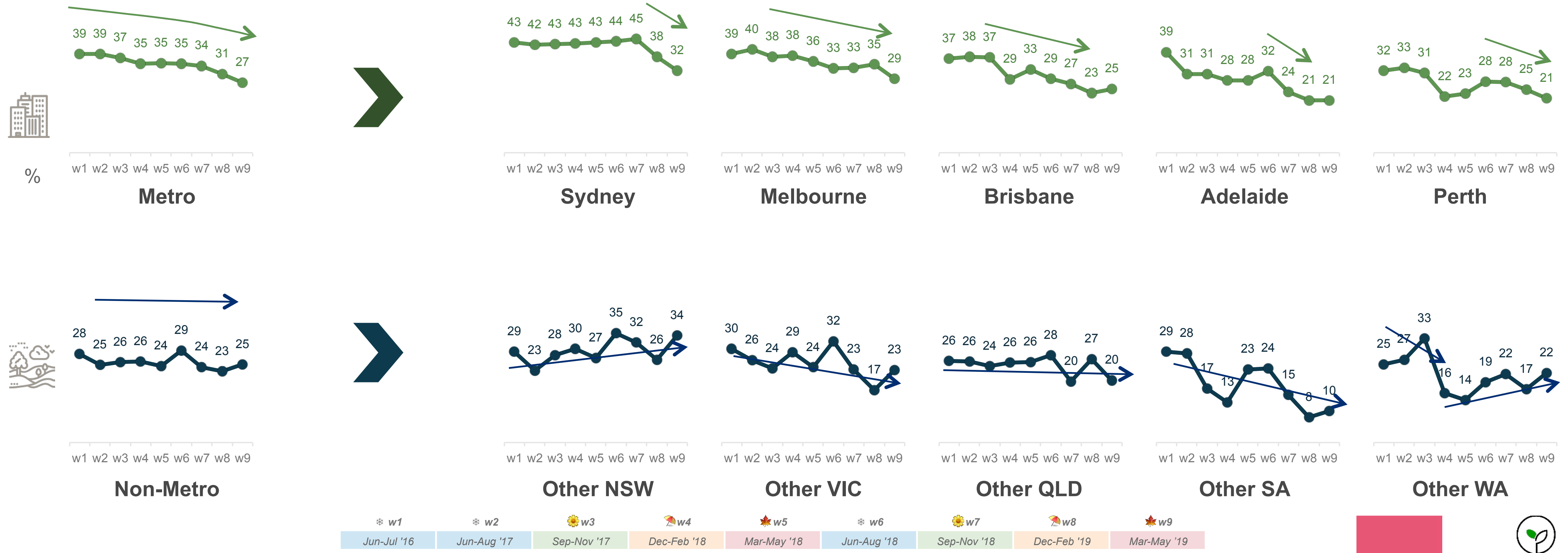
# Eating out rates – Metro/non-metro

**31%**
*Overall population*
***Jun '17 – May '19***

*Proportion that purchased most recent lunch OR dinner out of home (takeaway OR at restaurant/ outlet).*

***Metropolitan** eat-out rates have continued the **downward trend** across **all capital cities in autumn** – a **Sydney downturn** has now appeared to hit full swing after earlier resistance.*

***Non-metro** eat-out rates have been far more **consistent**, and vary by region, with **Other NSW** and **Other WA** (more recently) showing longer-term increases since summer 2018, though regional VIC, SA and QLD are still on a long term decline.*

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AUSTRALIAN Pork
THRIVE INSIGHTS

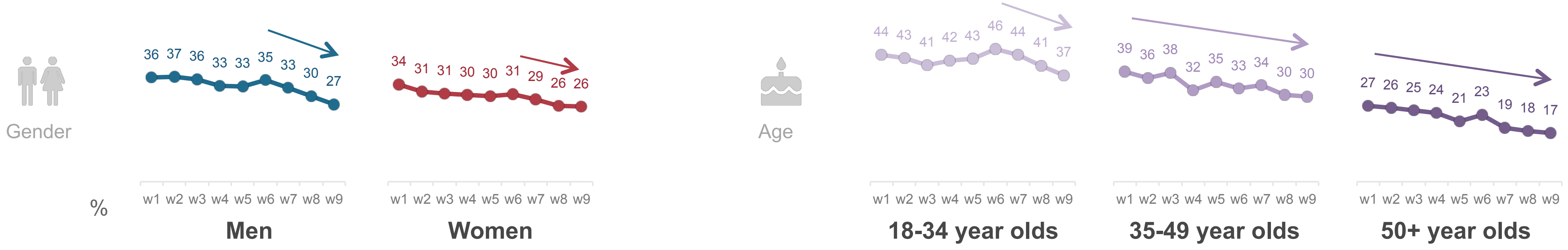
# Eating out rates – Demographics

31%
Overall population
**Jun '17 – May '19**

*Proportion that purchased most recent lunch OR dinner out of home (takeaway OR at restaurant/ outlet).*

*The **decline** in eat-out rate has been more **pronounced** amongst **men** in recent seasons; though rates have declined amongst both over the long term.*

***Younger** Australians continue to be **more likely to eat-out** (whether take-away or dining out). However, while **18-34 year olds had resisted** any decline until winter 2018, they appear to have **curbed their foodservice activity** more recently.*




| w1 | w2 | w3 | w4 | w5 | w6 | w7 | w8 | w9 |
|---|---|---|---|---|---|---|---|---|
| Jun-Jul '16 | Jun-Aug '17 | Sep-Nov '17 | Dec-Feb '18 | Mar-May '18 | Jun-Aug '18 | Sep-Nov '18 | Dec-Feb '19 | Mar-May '19 |

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Men (n=1,468), Female (n=1,515). Aged 18-34 years (n=627), 35-49 years (n=740), 50+ years (n=1,616).

# Australian Foodservice Population and Market Sizing

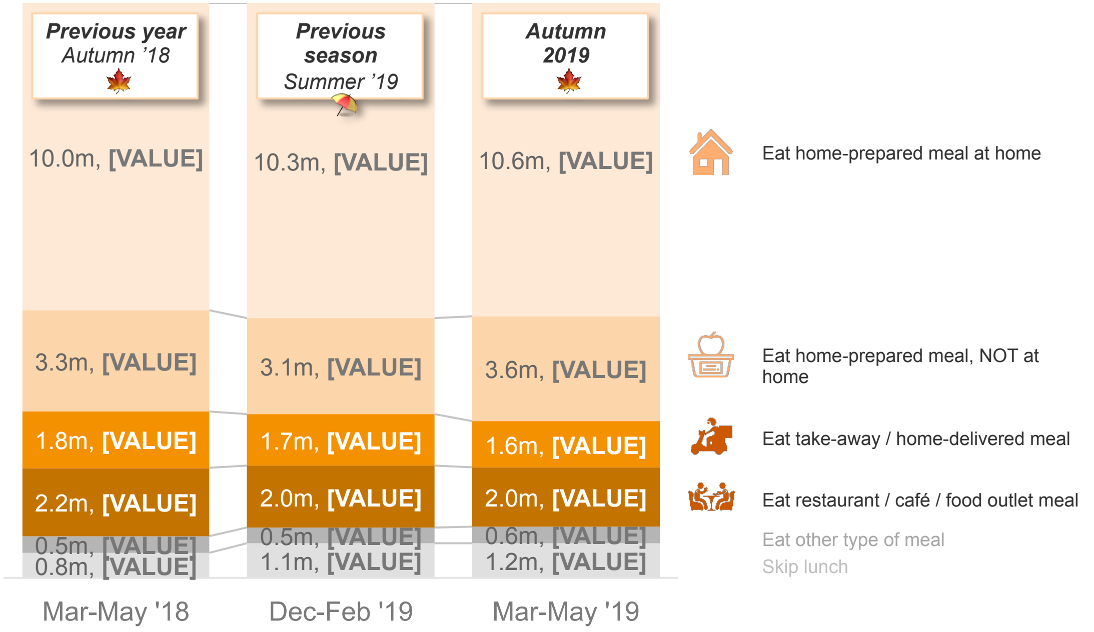
# Population Metrics

*Compared to **last season** and the **same time last year**, the number of **lunches** eaten out of home has **decreased**, both in overall volume and as a proportion of daily lunches – this is attributable to both take-away and dine-out. **Lunches brought to work** appear to have taken this share.*

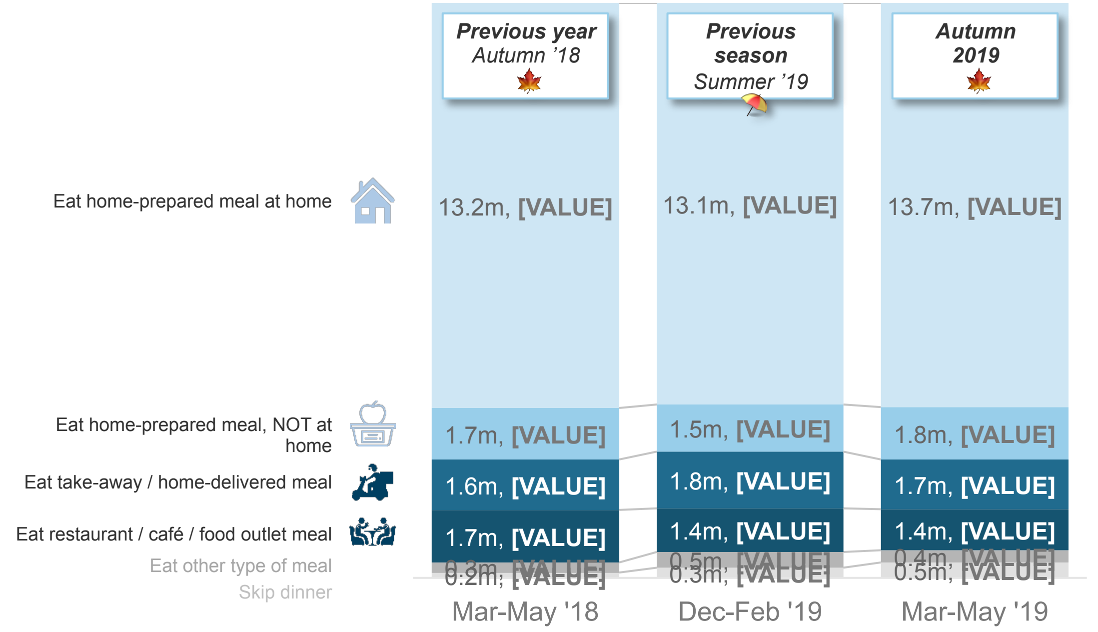
AUSTRALIAN POPULATION AGED 18+ **19.4 MILLION***

*Compared to **last season** and the **same time last year**, the number of **dinners** eaten out of home has **decreased**, both in overall volume and as a proportion of daily dinners. The drop is more marked for dinners eaten **on-premise (restaurant/ café)**.*

On any given day, for LUNCH…




On any given day, for DINNER…




Total Out-of-home:

| Lunch | Mar-May '18 | Dec-Feb '19 | Mar-May '19 |
|---|---|---|---|
| Total Out-of-home | 4.1m, 22% | 3.7m, 20% | 3.6m, 18% |

Total out-of-home lunches and dinners eaten every day

| Mar-May '18 | Dec-Feb '19 | Mar-May '19 |
|---|---|---|
| 7.4 million | 7.0 million | 6.6 million |

| Dinner | Mar-May '18 | Dec-Feb '19 | Mar-May '19 |
|---|---|---|---|
| Total Out-of-home | 3.4m, 18% | 3.3m, 18% | 3.1m, 16% |

* As of May 2019. ABS data based on estimates from 2016 to 2019.
"On any given day" is based on the most recent lunch, and most recent dinner.



AUSTRALIAN Pork

THRIVE INSIGHTS

# Total Spend on Out of Home Meals

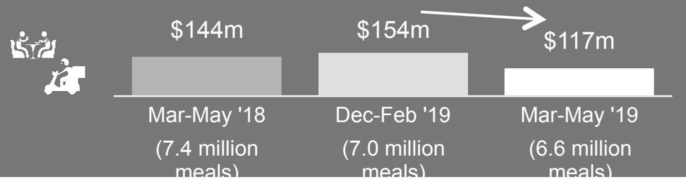
## Autumn 2019 vs. Previous season and Previous year

*__Average daily total foodservice spend__ has __declined significantly__ in autumn 2019, compared with the previous period (summer). These falls have been driven by heavy reductions in __both lunch and dinnertime spend__; and across both __take-away/home-delivered__ meals as well as those eaten __on-premise__.*

*Compared with the same time last year, the falls have been __more marked__ for meals eaten __on-premise__ at the restaurant/café/outlet (whereas spend is actually rather consistent for take-away/delivered meals).*

*Whereas __increased spend__ compensated for reduced volume in the previous period (summer '19), now a further reduction in volume __as well as average spend__ as resulted in significantly reduced total spend on foodservice lunches in autumn '19. Compared to '18, __restaurant/café__ meals have fared __worse__ than take-away/delivered.*

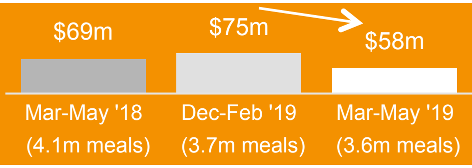
Total out-of-home spend, EVERY DAY



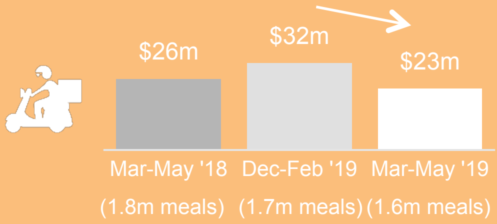

*As with lunches, where __increased spend__ previously compensated for reduced volume in summer '19, now a further reduction in volume __and spend__ has resulted in significantly reduced total spend on dinners in autumn '19. Compared to '18, __restaurant/café__ meals have fared significantly worse than take-away/delivered meals.*

## LUNCH

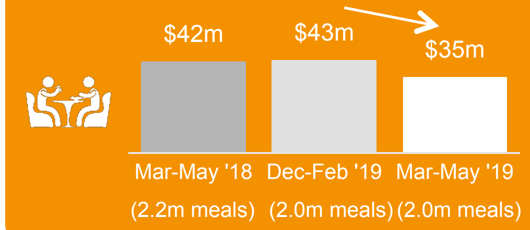
Daily spend on out-of-home lunches:




Taking the average spend per meal into account, Australians spent, **daily**, on **take-away / home-delivered** lunches:

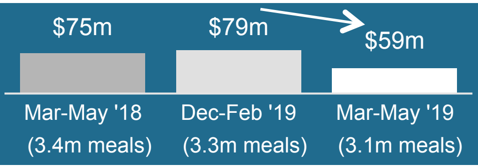



Taking the average spend per meal into account, Australians spent, **daily**, on **restaurant / café / food outlet** lunches:

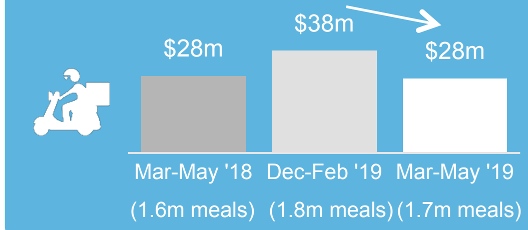



## DINNER

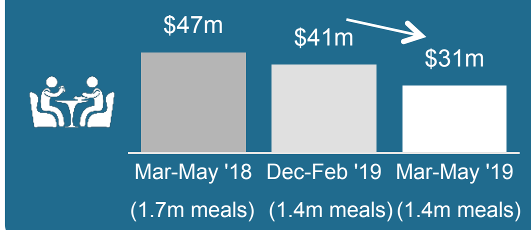
Daily spend on out-of-home dinners:




Taking the average spend per meal into account, Australians spent, **daily**, on **take-away / home-delivered** dinners:




Taking the average spend per meal into account, Australians spent, **daily**, on **restaurant / café / food outlet** dinners:




* All figures are calculated based on **most recent** lunch or dinner – a representation of Australians' meal activity on a day-to-day basis.



AUSTRALIAN Pork THRIVE INSIGHTS

# Foodservice consumers

*n=1,551 respondents*

# Share of meals

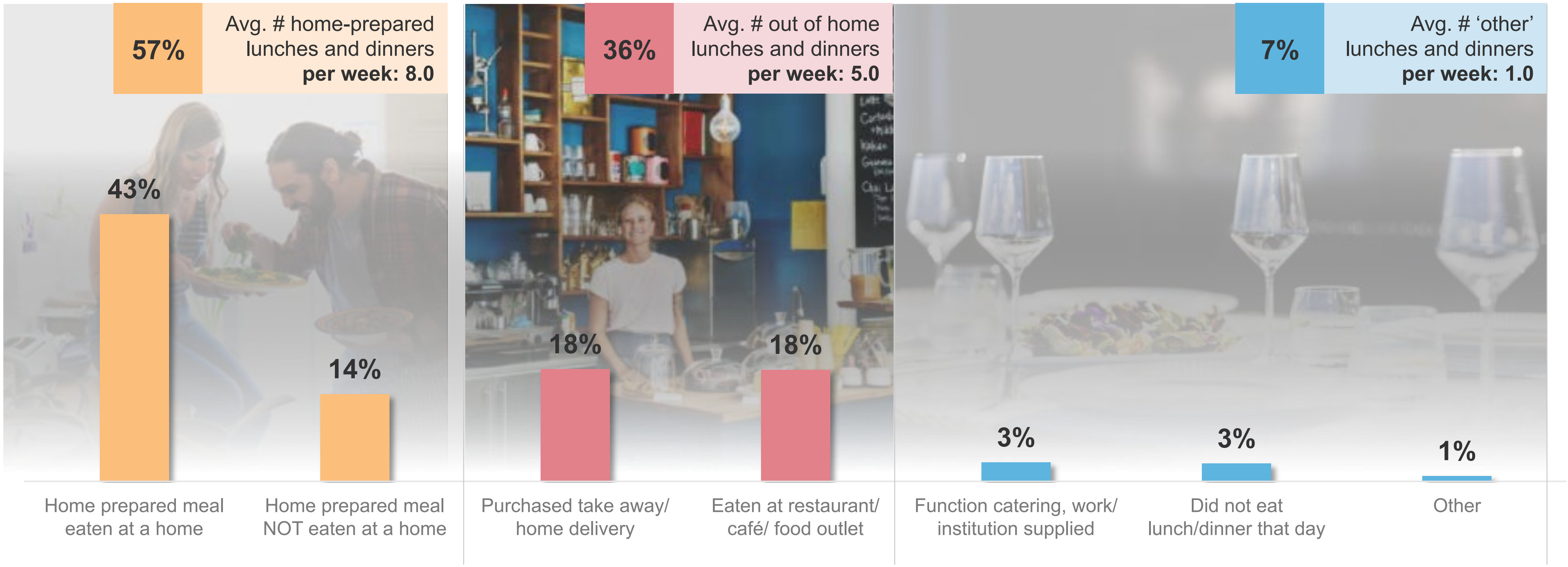
*amongst out-of-home diners*

*for past 3 lunches & past 3 dinners*

*total across 6 meals: 9,306 meals*

# Share of all lunches & dinners (past 3 days)

Autumn 2019: March-May




Base: March-May 2019: All meals; Foodservice consumers (n=8,958).

# Total out-of-home meals

*amongst all out-of-home lunches and dinners in the past 3 days*

*includes meals purchased takeaway / delivery OR meals eaten at the outlet*

*total n=3,214 meals*

# Meal Summary

*Leading choices amongst all out-of-home lunches and dinners over 3 days (3,214 meals)*

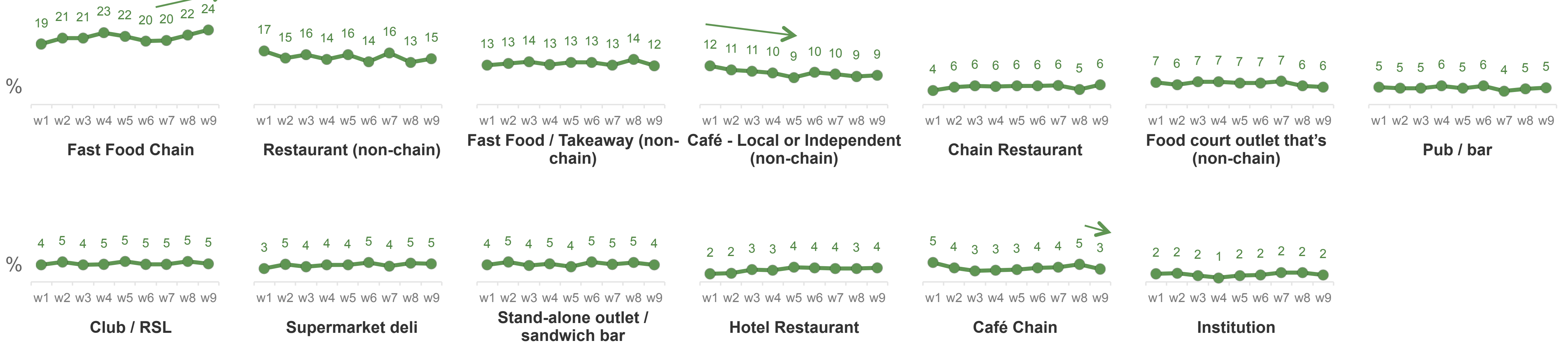
| | Autumn: Mar-May 2019 | Change since Dec-Feb 2019 |
|---|---|---|
| Venue type | **Fast Food Chain (24%) followed by non-chain Restaurant (15%) and non-chain Fast food (12%)** | QSR / Fast Food Chains increased their share further this season. With non-chain establishments fluctuating season-to-season, Restaurants overtook Fast food in autumn. |
| Restaurant segment | **Fast Food / Takeaway (31%), Affordable $ Traditional (19%)** | After reaching a tracking low, QSR rebounded strongly. Also, while High-end segments had been slowly growing, this season sees a significant dip. Affordable and Moderate segments are more consistent. |
| Cuisine | **Australian (45%), followed by Asian (24%)** | Australian cuisine remains steady. Both Asian and European cuisines show a dip in autumn (by 3 and 2 percentage points respectively) while Other cuisines lifted (4%). |
| Food type | **Burger / Slider (16%), Pizza (8%), Sandwich / Wrap / Roll etc. (8%).** | Burger/slider has lifted further this season, while Pizza slipped back to previous-autumn levels. Fried meats gained in autumn. |
| Meat eaten | **Chicken (38%), Beef (30%), Fish (12%), Pork ranked 4$^{th}$ at 10%** | Chicken has its second consecutive season of growth, while Beef and Fish are steady. Pork softened since the heights of autumn and spring. |
| Dollar spend per person for meal | **$0-10 p.p. increased sharply (33%); $21 p.p. decreased sharply (23%). Average spend decreased to $17.69 per meal** | After consistent long-term increases, average spend p.p. dropped sharply in autumn; correspondingly, large share increase in low-priced meals and decrease in high-priced meals. |

# Venue type

Total, amongst all out of home lunches and dinners over 3 days

***Fast Food Chains** have continued their **upward momentum** in autumn; while other venues remain relatively consistent with previous seasons.*

*After a steady (but gradual) decline, local/independent cafés now appear to be holding share, at around 9% of meals; while café chains took a mild hit this autumn.*




| w1 | w2 | w3 | w4 | w5 | w6 | w7 | w8 | w9 |
|---|---|---|---|---|---|---|---|---|
| Jun-Jul '16 | Jun-Aug '17 | Sep-Nov '17 | Dec-Feb '18 | Mar-May '18 | Jun-Aug '18 | Sep-Nov '18 | Dec-Feb '19 | Mar-May '19 |

Base: All foodservice meals: Jun-Jul '16 (n=12,659), Jun-Aug '17 (n=3,364), Sep-Nov '17 (n=3,230), Dec-Feb '18 (n=3,246), Mar-May '18 (n=3,336), Jun-Aug '18 (n=3,369), Sep-Nov '18 (n=3,319), Dec-Feb '19 (n=3,214), Mar-May '19 (n=3,102).



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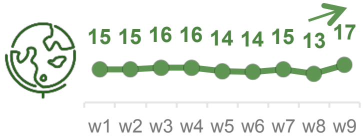
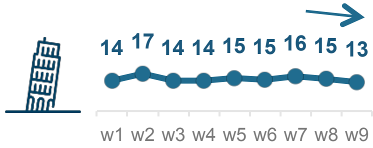
# Cuisine

## Autumn 2019: Mar-May

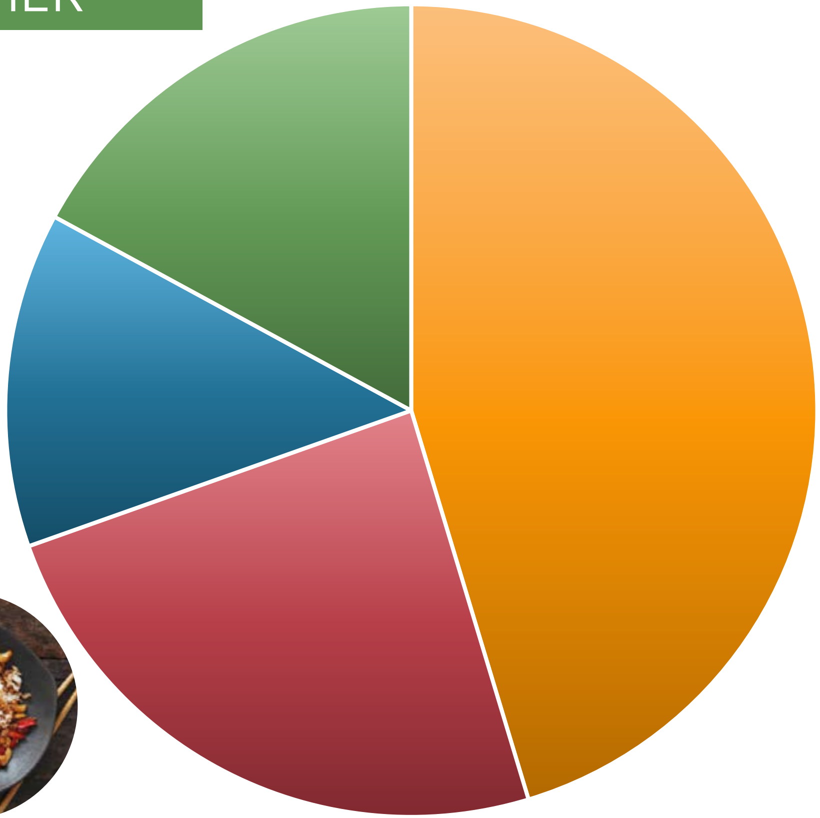



OTHER

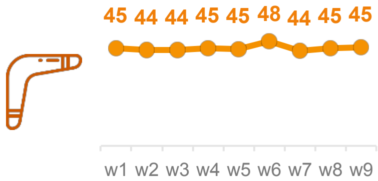
Total, amongst all out of home lunches and dinners over 3 days



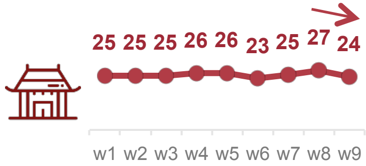

EUROPEAN



AUSTRALIAN




*In contrast to the previous season, **Asian** cuisine **lost** its share of cuisine gained in summer, while **Other** cuisines looked notably **stronger in autumn**. **European** cuisine has also continued to slide since Spring 2018.*




ASIAN

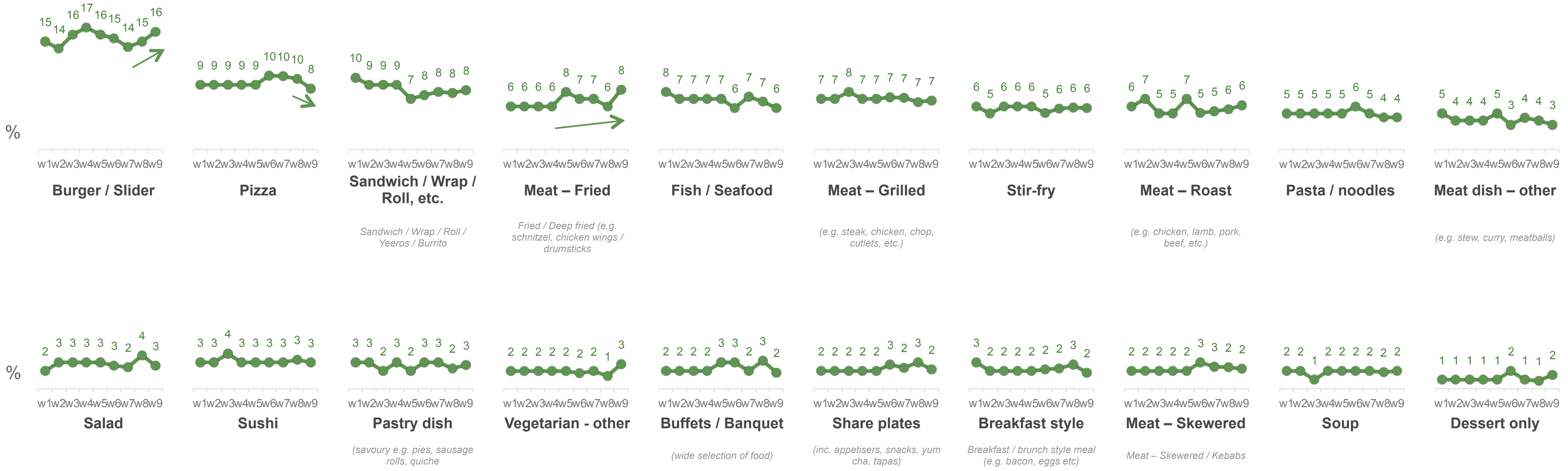
| % | w1 | w2 | w3 | w4 | w5 | w6 | w7 | w8 | w9 |
|---|---|---|---|---|---|---|---|---|---|
| | Jun-Jul '16 | Jun-Aug '17 | Sep-Nov '17 | Dec-Feb '18 | Mar-May '18 | Jun-Aug '18 | Sep-Nov '18 | Dec-Feb '19 | Mar-May '19 |

Base: All foodservice meals: Jun-Jul '16 (n=12,659), Jun-Aug '17 (n=3,364), Sep-Nov '17 (n=3,230), Dec-Feb '18 (n=3,246), Mar-May '18 (n=3,336), Jun-Aug '18 (n=3,369), Sep-Nov '18 (n=3,319), Dec-Feb '19 (n=3,214), Mar-May '19 (n=3,102).

# Food type

*Total, amongst all out of home lunches and dinners over 3 days*

***Burgers /sliders** continue to be the leading food type, with double the share of the next-most common food, and continuing to bounce back after dipping in spring ‘18. Pizzas have posted a softer autumn after several seasons at 10% share; whereas **fried meat** dishes have had a bumper autumn (and also had a high of 8% share in the previous autumn).*




| w1 | w2 | w3 | w4 | w5 | w6 | w7 | w8 | w9 |
|---|---|---|---|---|---|---|---|---|
| Jun-Jul '16 | Jun-Aug '17 | Sep-Nov '17 | Dec-Feb '18 | Mar-May '18 | Jun-Aug '18 | Sep-Nov '18 | Dec-Feb '19 | Mar-May '19 |

Base: All foodservice meals: Jun-Jul '16 (n=12,659), Jun-Aug '17 (n=3,364), Sep-Nov '17 (n=3,230), Dec-Feb '18 (n=3,246), Mar-May '18 (n=3,336), Jun-Aug '18 (n=3,369), Sep-Nov '18 (n=3,319), Dec-Feb '19 (n=3,214), Mar-May ’19 (n=3,102).



AUSTRALIAN Pork
THRIVE INSIGHTS

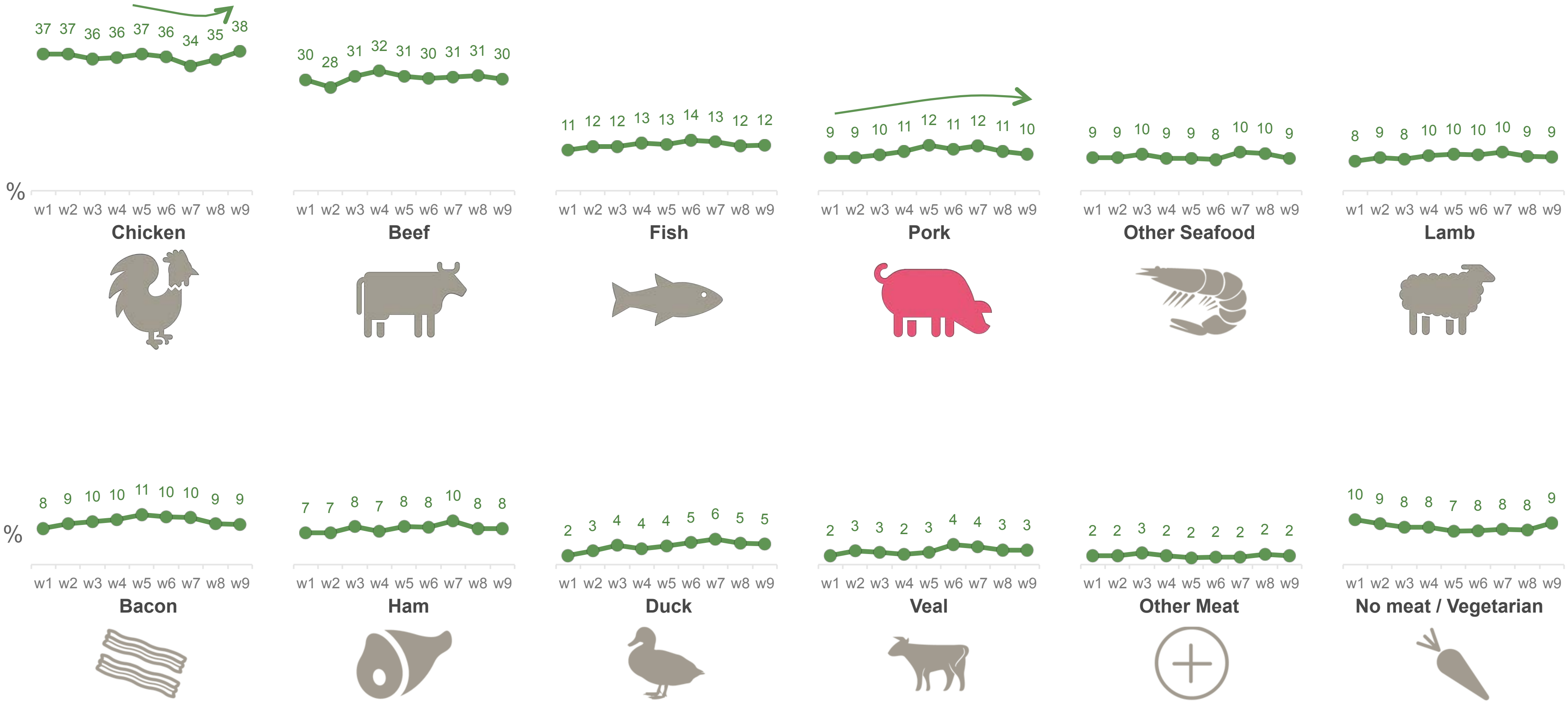
# Meat eaten

***Chicken** meals continue to post increasing share again, after a longer-term declining trend.*

*Meanwhile, beef and fish have remained consistent.*

***Pork** and **Ham** have both continued to soften after a weaker summer period.*

*Total, amongst all out of home lunches and dinners over 3 days*




| w1 | w2 | w3 | w4 | w5 | w6 | w7 | w8 | w9 |
|---|---|---|---|---|---|---|---|---|
| Jun-Jul '16 | Jun-Aug '17 | Sep-Nov '17 | Dec-Feb '18 | Mar-May '18 | Jun-Aug '18 | Sep-Nov '18 | Dec-Feb '19 | Mar-May '19 |

Base: All foodservice meals: Jun-Jul '16 (n=12,659), Jun-Aug '17 (n=3,364), Sep-Nov '17 (n=3,230), Dec-Feb '18 (n=3,246), Mar-May '18 (n=3,336), Jun-Aug '18 (n=3,369), Sep-Nov '18 (n=3,319), Dec-Feb '19 (n=3,214), Mar-May '19 (n=3,102).

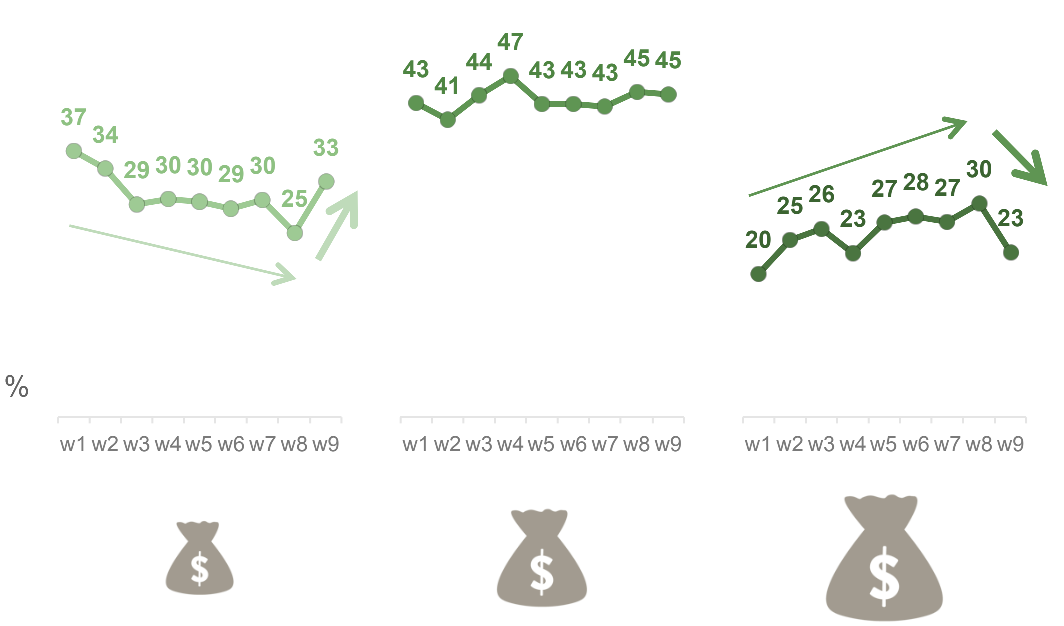
# Dollar spend on meal

*Total, amongst all out of home lunches and dinners over 3 days*

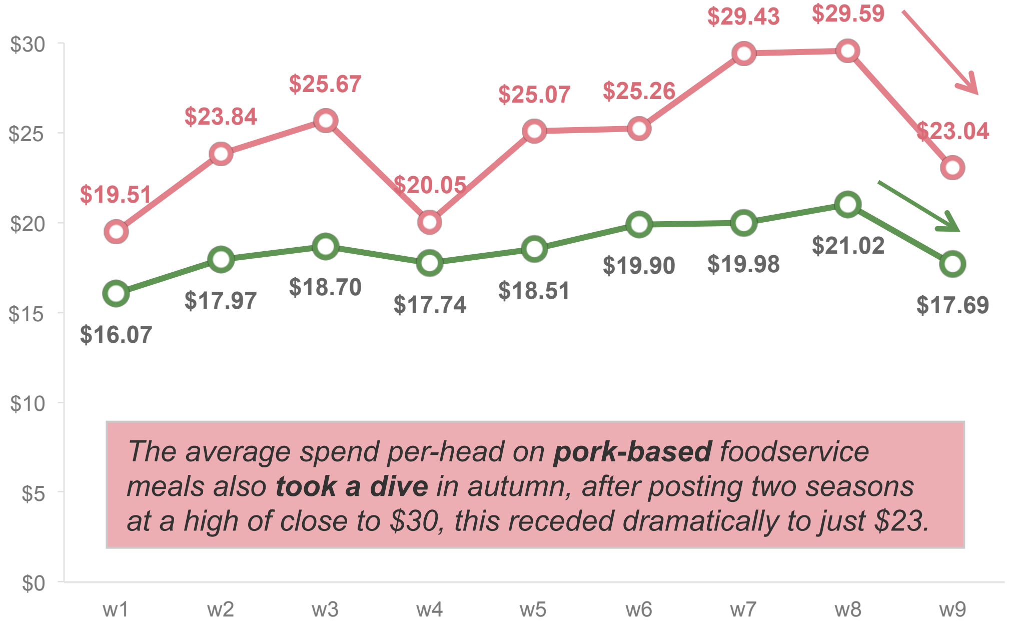
*It appears Australians have begun to **tighten their belts**. Finally, after several seasons of growth in the highest-spend bracket, meals in the **over-$21 category dropped off heavily** during autumn. Inversely, after consistent decline in meals up to $10, these saw a **significant increase** in the latest March-to-May period.*

*After an ever-increasing average spend since winter 2016, spend per-head on foodservice meals **took a plunge** in autumn, with the average **dropping 16%** from its high of over $21, to just $17.69; a level not seen since summer 2018.*

## Spend per person (dollar range)




## Spend per person (calculated average)




*The average spend per-head on **pork-based** foodservice meals also **took a dive** in autumn, after posting two seasons at a high of close to $30, this receded dramatically to just $23.*

| w1 | w2 | w3 | w4 | w5 | w6 | w7 | w8 | w9 |
|---|---|---|---|---|---|---|---|---|
| Jun-Jul '16 | Jun-Aug '17 | Sep-Nov '17 | Dec-Feb '18 | Mar-May '18 | Jun-Aug '18 | Sep-Nov '18 | Dec-Feb '19 | Mar-May '19 |

Base: All foodservice meals (Total / containing pork): Jun-Jul '16 (n=12,659 / 1,146), Jun-Aug '17 (n=3,364 / 297), Sep-Nov '17 (n=3,230 / 306), Dec-Feb '18 (n=3,246 / 342), Mar-May '18 (n=3,336 / 389), Jun-Aug '18 (n= 3,369 / 365), Sep-Nov '18 (n= 3,319 / 382), Dec-Feb '19 (n=3,214 / 327), Mar-May '19 (n=3,102 / 288).
* Based on (up to) the last 3 foodservice lunches or dinners purchased.



AUSTRALIAN Pork

THRIVE INSIGHTS

# Top 10 Summary

## Autumn 2019: March-May

***Restaurants*** *made some gains on the venue front during autumn, while non-chain Fast Food, Food court outlets, and Stand-alone venues lost places. Pubs and Clubs reversed places.*

***Fried Meats*** *gained positions during autumn, displacing Fish/seafood and Grilled meat. Meanwhile, the ranking of meats eaten remains consistent with summer.*

| | Venue Type | | Food type | | Meats eaten | |
|---|---|---|---|---|---|---|
| 1 | Fast Food Chain | – | Burger / Slider | – | Chicken | – |
| 2 | Restaurant (not a chain) | ▲ | Pizza | – | Beef | – |
| 3 | Fast Food / Takeaway (local or independent) | ▼ | Sandwich / Wrap / Roll / Yeeros / Burrito | – | Fish | – |
| 4 | Café - Local or Independent (can sit down in venue) | – | Meat – Fried | ▲ | Pork | – |
| 5 | Chain restaurant | ▲ | Fish / Seafood | ▼ | Seafood (other than fish) | – |
| 6 | Food court outlet (not a chain) | ▼ | Meat – Grilled | ▼ | Lamb | – |
| 7 | Pub /bar | ▲ | Stir-fry | – | Bacon | – |
| 8 | Club / RSL | ▼ | Meat – Roast | – | Ham | – |
| 9 | Supermarket deli | ▲ | Pasta / noodles | – | Duck | – |
| 10 | Stand-alone food outlet / sandwich bar | ▼ | Meat dish – Other | – | Veal | – |

# Total out-of-home meals

*comparing lunches vs dinners;*
*takeaway/delivery vs dine in meals*

# Analysis by meal occasion

Lunch vs. Dinner

# Meal occasion summary – Lunch vs. Dinner

## Autumn 2019: March-May

### LUNCH FOODSERVICE MEALS

**VENUE:** **Fast food chain** venues continued to increase in autumn, matching the peak reached in summer ‘18. Meanwhile, **local/independent cafés** have maintained a long-term declining trend for lunchtime out-of-home eating.

**SEGMENT:** The slow decline in **QSR/takeaway** has been arrested with a substantial increase in share during autumn. Conversely, the High $ spend segments have fallen considerably.

**FOOD TYPE:** **Burgers / sliders** and **between-bread** options have been steady, however, **Fried meat** has seen an increase (coinciding with an increase **last autumn** also), while **Pizza** has continued to gradually recede.

**MEAT EATEN:** **Chicken** share of foodservice lunches has **risen** to 37%; **Pork** has had a **weaker** season, continuing to slide gradually since autumn last year.

**DOLLAR SPEND:** A **sudden drop** in the **average spend p.p.** after successive increases. The number of lunches in the highest $21+ bracket have fallen sharply, while those in the $10 and under category have risen. Share of meals in the intermediate price range have remained steady.

### DINNER FOODSERVICE MEALS

**VENUE:** **Fast food chains** also continue their upward trend, accelerating slightly in autumn. These venues have now appreciably overtaken **non-chain restaurants**, which despite showing an uptick in autumn, maintain a broader decline.

**SEGMENT:** As with lunches, **QSR/takeaway** declines have come to a sudden end with significantly increases this season; and High $ Formal share has dropped.

**FOOD TYPE:** As with lunches, **Fried meats** have jumped during autumn. **Burgers/ sliders** have also significantly boosted their share of dinners this season; while **Pizza** and **Grilled meat** hold fairly steady. **Fish/seafood** and **Other meat** dishes continue to decline gradually.

**MEAT EATEN:** **Chicken** has also increased its share of dinners, to 39%, and **pork** has posted share of 11%, consistent with summer but down on the highs of autumn and spring 2018.

**DOLLAR SPEND:** As with lunches, the **average spend p.p.** on dinners **dropped** significantly in autumn. The number of dinners in the highest price bracket fell while those in the cheapest bracket rose; and intermediate-priced meals remained steady.

# Analysis by eating location

## Take-away vs. Dine-out

# Eating location summary – Take-away vs. Dine-out

## Autumn 2019: March-May

### TAKE-AWAY / HOME-DELIVERED FOODSERVICE MEALS

**VENUE:** Share of take-away and home-delivery meals continues to **increase** for **QSR** venues into autumn '19, while **Non-chain fast food** venues dipped. Share of off-premise meals has otherwise been relatively consistent.

**SEGMENT:** After several successive seasons of decline, **QSR** has shown a **significant increase** in share of take-away/home-delivered meals in autumn. Further to the theme of reduced spend, **Affordable $ Contemporary** share has increased notably (though Traditional has decreased), and **High $** segments have both **declined** noticeably in autumn.

**MEAT EATEN: Chicken** has posted notable **increases** during autumn, while **Pork** share of take-away / home-delivered meals has continued to **recede**.

**DOLLAR SPEND:** The **average dollar spend p.p.** on take-away/delivered meals **decreased** in the autumn wave, along with sharp increases in the share of meals priced under $10, and a decrease in those priced over $20.

### RESTAURANT / CAFÉ / FOOD OUTLET (DINE-OUT) FOODSERVICE MEALS

**VENUE:** Share of meals eaten on-premise at the restaurant / café / food outlet has also been largely steady, although **QSR** has also posted a **second successive season of growth**, and **Local/independent cafes** continues a slow **decline**. **Chain cafés** also **dipped** this season.

**SEGMENT:** Similarly, amongst on-premise meals, **QSR** has **increased** sharply, and **Affordable $ Traditional** share has also increased (though Contemporary has decreased). **Moderate** share, and **High $ Formal** share, have also **decreased** this season.

**MEAT EATEN:** Similarly to takeaway/ home delivery, **chicken increased** its share notably, while **Pork** share of restaurant/café meals has continued to recede.

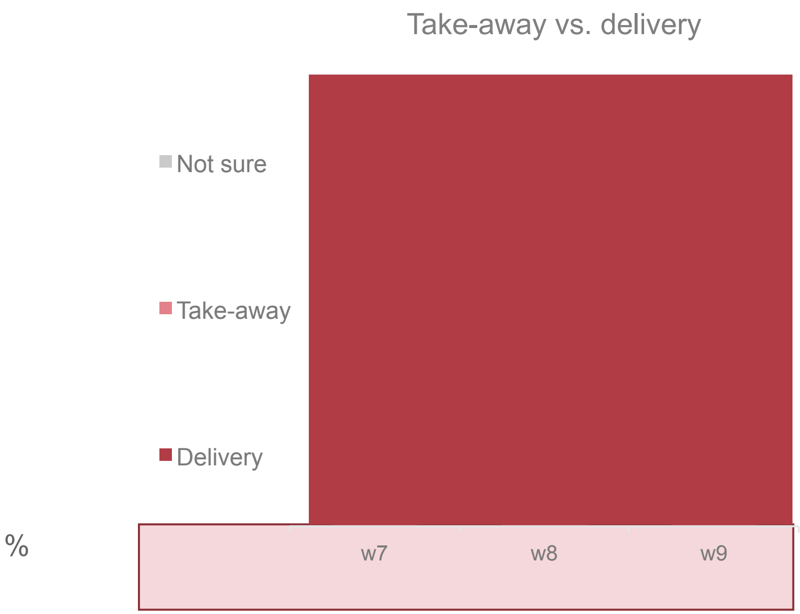
**DOLLAR SPEND:** As with take-away/delivered meals, the **average spend p.p.** on restaurant/café meals **decreased** substantially this season, coinciding with sharp increases in meals priced under $10, and a decrease in meals priced over $20.

# Delivery service

Take-away / home-delivered meals

# What share of Take Away is delivered via UberEats, Menulog and other delivery platforms?

*Amongst all take-away and home-delivered lunches and dinners over 3 days*




**Delivery**

Delivery method

| | w7 | w8 | w9 |
|---|---|---|---|
| Website/App (NET) | XX% | XX% | XX% |

**Please contact Venessa.Barnes@australianpork.com.au for further information.**
**Thanks for your understanding**

**Uber Eats** | **Restaurant/outlet delivered** | **Menulog** | **Deliveroo** | **Other delivery website/app** | **Not sure**

w7 Sep-Nov '18 | w8 Dec-Feb '19 | w9 Mar-May '19

*Q: Please indicate if the meal(s) listed below were purchased as takeaway or delivery? | Please indicate how each meal was delivered?* Questions added September 2018.
Base: All take-away or home-delivered foodservice meals / those that were delivered: Sep-Nov '18 (n=1,535 / 299), Dec-Feb '19 (n=1,663 / 371), Mar-May '19 (n=1,571 / 286).

# Reservations

**Dine-out meals**


AUSTRALIAN Pork

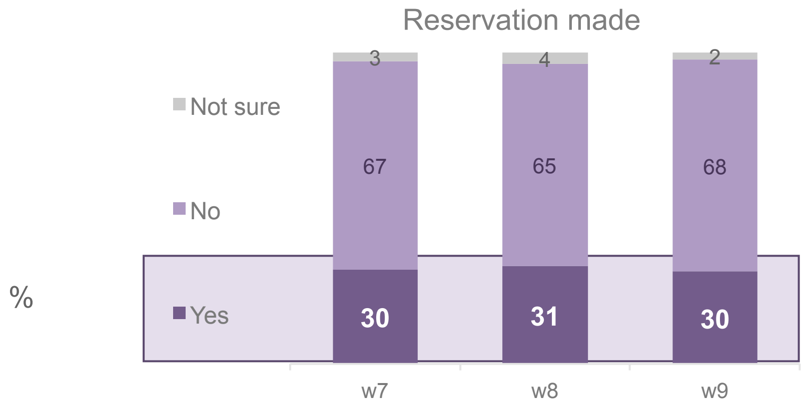
THRIVE INSIGHTS

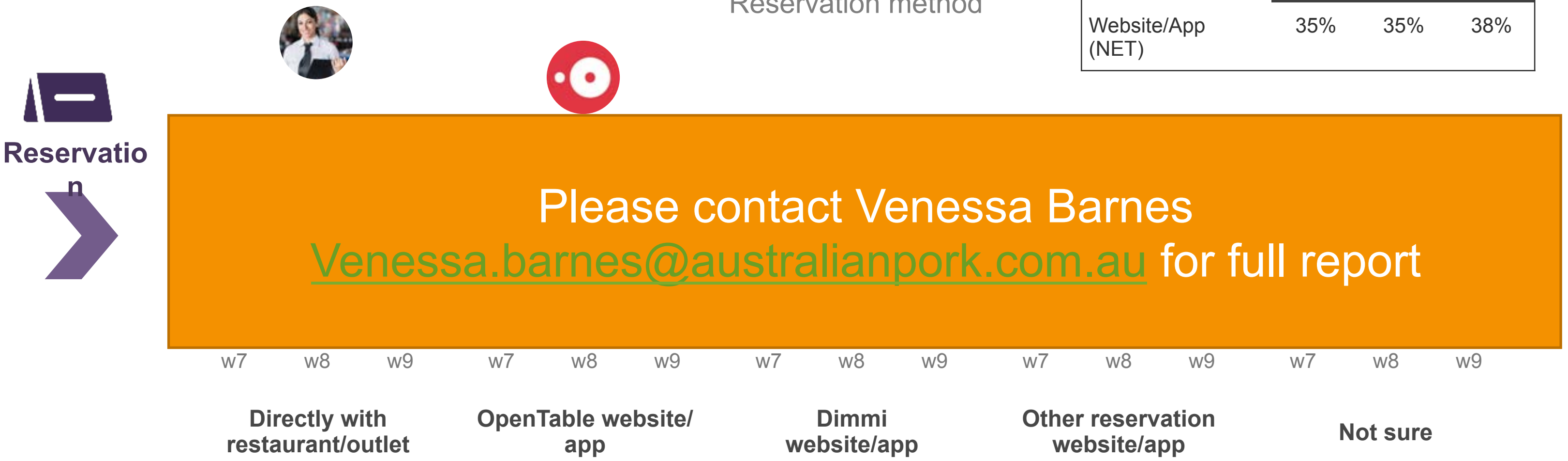
# Reservation made

*Amongst all restaurant/café/food outlet lunches and dinners over 3 days*

*A **reservation** is made for **3 foodservice meals out of every 10** that are eaten **on-premise** at the restaurant, café or food outlet. This rate has remained **consistent** since spring till now.*

*Making a booking **directly with the restaurant/outlet** is the **most common** method – roughly 6 in 10 reservations are made this way – but this method has **slowly declined** since spring, with **website/app** reservations increasing in autumn – this is driven particularly by **OpenTable**.*




|  | w7 | w8 | w9 |
|---|---|---|---|
| Website/App (NET) | 35% | 35% | 38% |

Please contact Venessa Barnes
Venessa.barnes@australianpork.com.au for full report

w7 Sep-Nov '18 | w8 Dec-Feb '19 | w9 Mar-May '19

Q: *Was a reservation made for the meal occasion(s) listed below?* | *How was the reservation made for the meal occasion(s) listed below?* Questions added September 2018.
Base: All foodservice meals eaten at restaurant/café/food outlet / those where a reservation was made: Sep-Nov '18 (n=1,522 / 435), Dec-Feb '19 (n=1,551 / 460), Mar-May '19 (n=1,531 / 424).