

## 5 Route to Market

\* The report identifies the **relative importance of various distribution channels** for Asian foodstuffs. Distribution channels include:

- ▶ General distributor
- ▶ Specialist distributor/wholesaler
- ▶ Specialist distributor/wholesaler for Asian ingredients supplying foodservice as well as retail
- ▶ Other retail stores (i.e. butchers)
- ▶ Cash & Carry
- ▶ Supermarkets
- ▶ Direct from manufacturer/importer

\* Key distributors/wholesalers of Asian foodstuffs by State

## 6 The Foodservice Consumer

The report investigates consumers' reasons and preferences for dining out in Asian Cuisine restaurants. It examines:

- \* How consumers select type of Asian cuisine when dining out including *Chinese, Thai, Indian and Other*
- \* Frequency of dining out in Asian cuisine restaurants by main demographics including gender, age, income level, household composition, ethnic background as well as state
- \* Average spend on food by main demographics
- \* Type of courses consumed – entrée, main course and/or dessert
- \* Main day of the week as well as main time of the day when eating out by Asian cuisine type
- \* Dining out Consumer Confidence

### METHODOLOGY

The research methodology includes:

**Extensive desk research** including FI Foresight's proprietary databases

**Qualitative interviews** with Asian Cuisine restaurant operators

**Quantitative survey** with Asian Cuisine restaurant operators in a statistically representative sample

**Consumer online survey** of 1,200 consumers aged 18+



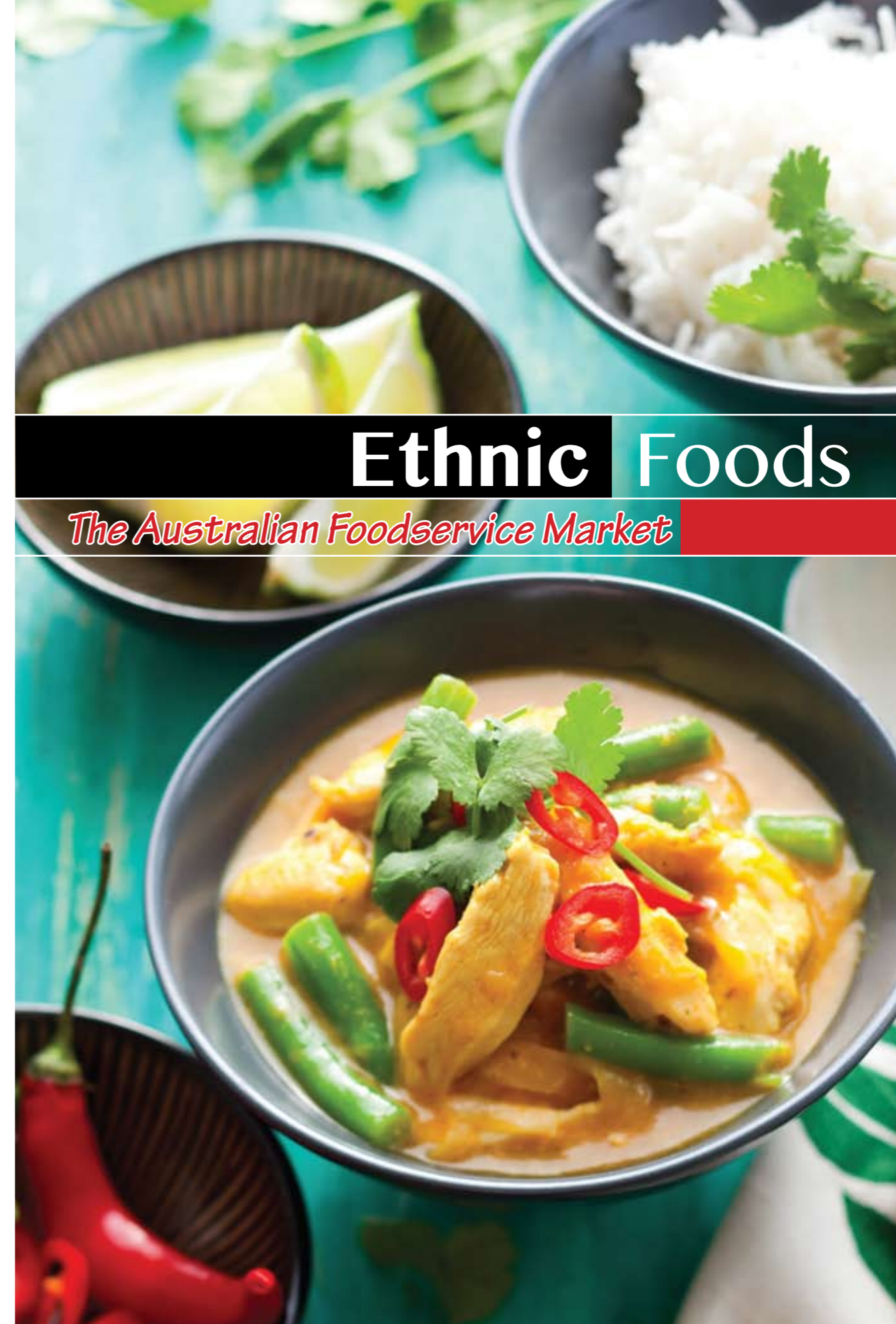
### CONTACTS

**Sissel Rosengren**  
sissel.rosengren@fiforesight.com

**Tim Emmerson**  
tim.emmerson@fiforesight.com

**Kevin McDonald**  
kevin.mcdonald@fiforesight.com

T: 1300 66 7274  
www.FIForesight.com



# Ethnic Foods

## The Australian Foodservice Market





## 1 Market Structure: Asian Cuisine Outlet Numbers

The number of full service restaurant operators who serve **Chinese, Thai** and **Indian Cuisine** is presented in a database which – for each Cuisine – identifies:

- \* Number of Outlets by State
- \* Number of Outlets by State by Metro & Regional Areas

Each of the report volumes outlines an **analysis of the outlet numbers serving the three Asian cuisines**, and 2014 forms the basis line for **tracking Asian cuisine outlet number development** in the Australian Foodservice Market.

Each report volume also highlights *key trends and developments* within each cuisine in terms of regional ethnic cuisines gaining or losing prominence in the market place.

## 2 Menu index

For each of the report volumes, the **menu index** identifies:

### Top Dishes Served.....

- > Top five entrées served by volume
- > Top ten main courses served by volume

### Menu Changes.....

- > Frequency of change of menu & most common time of year
- > Menu changes for holidays & special events

### Average Menu Price.....

- > Average price charged for an entrée in metropolitan versus regional areas
- > Average price charged for a main course in metropolitan versus regional areas

### Main Ingredients Used.....

- > Main fresh ingredients used to create top five entrées served
- > Main fresh ingredients used to create top ten main courses served
- > Main sauces, condiments, dressings, spices, herbs, stocks, seasonings, oils and dry foodstuffs (including noodles & rice) used to create the top five entrées served
- > Main sauces, condiments, dressings, spices, herbs, stocks, seasonings, oils and dry foodstuffs (including noodles & rice) used to create the top ten main courses served



# ETHNIC FOODS IN THE AUSTRALIAN FOODSERVICE MARKET

## ASIAN CUISINES

**Asian cuisines have long been an integral part of the different menu offerings in the Australian Foodservice market. Over many decades, Australians have enjoyed the Chinese cuisine but the market has also more recently seen the introduction and growth of Thai cuisine as well as Indian, Vietnamese, Japanese, Malaysian and Korean cuisines.**

**The first study in our report series *Ethnic Foods in The Australian Foodservice Market* addresses Asian Cuisines and seeks to bring particular insights and data relating to full service restaurant operators serving different Asian cuisines.**

**The report is presented in three volumes covering full service restaurant operators serving:**

- 1 Chinese Cuisine    2 Thai Cuisine    3 Indian Cuisine



## 3 Product & Brand Selection

This report module explores the **purchasing process** when operators select suppliers and food and beverage products used in the creation of ethnic cuisine menu offerings.

The *report module* also identifies:

- \* Level of **made-from-scratch** by ingredient category (excluding fresh ingredients)
- \* **Brand Awareness** within the Sauces & Condiments and Dry Foodstuffs product categories
- \* **Main brands** used by ingredient product category (excluding fresh ingredients)
- \* **Brand selection criteria** and the importance of each  
These include:

- ▶ Customer service
- ▶ Distribution & delivery
- ▶ Price/value for money
- ▶ Product range
- ▶ Quality of product
- ▶ Reputation of brand
- ▶ Service by sales reps
- ▶ Quality of packaging
- ▶ Innovative product
- ▶ Specific sales promotions
- ▶ Stock availability



## 4 Market Communication

The report unveils **communication and information sources** used by ethnic cuisine restaurant operators when seeking *inspiration for menu development* as well as *selection of various ingredients, brands and suppliers*.

More specifically, the report examines the relative importance of various information sources including:

- \* Foodservice trade magazines
- \* Consumer food magazines such as Gourmet Traveller and Cuisine
  - \* Trade shows
  - \* The Internet
  - \* Social media
  - \* Cook books
- \* Other chefs (through word-of-mouth)
  - \* Customers
  - \* Visiting sales representatives