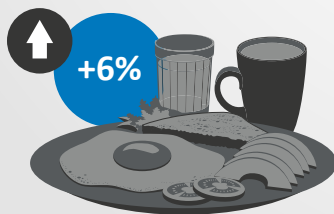


Traffic and spending grow, but budget-minded consumers seek value

Australia's economy is growing at a strong annual rate. Consumer sentiment has fallen to the lowest since November last year, though the overall index indicates consumers remain relatively optimistic. **The confidence has been affected by increases in mortgage interest rates, political instability, and continued household budget pressure.**

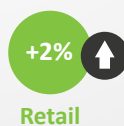
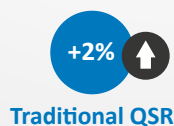


Take a Closer Look



Morning Meals

The most prominent growth sourced to morning meal occasions, **specifically breakfast and brunch, generating 2/3 of new visits to the industry.**



Fast casual, which had strong traffic growth from 2015 –2016, is now struggling, and traffic declines are accelerating. **FSR continues to be challenged, facing declining traffic for close to two years now.**



Kids meal



Family meal

Combo meals appear to be losing some appeal to the lower cheque option of value menu meals. **Family and kids' meals returned to growth as families returned to the industry.**

The NPD Group / CREST®, Q3 2018

For more data and insights about the Australian foodservice industry, contact The NPD Group at +61 2 8257 6426 or thomas.kelly@npd.com.

