

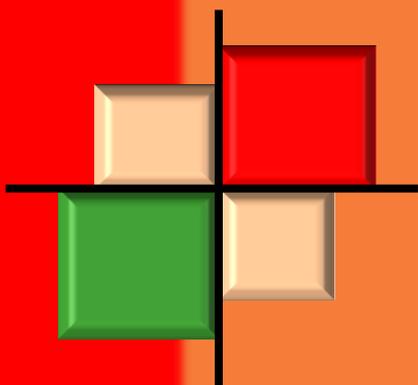


ENVIRONMENTAL
SCAN

2015

Fast Food

QUICK & LIMITED SERVICE
RESTAURANTS



RAPS

retail & personal services training council

OVERVIEW OF INDUSTRY

The Australian and New Zealand Standard Industrial Classification (ANZSIC) code for Fast Food is Division H/Sub-division 45/ Class 4512.

Fast Food Services in 2014-15 - Industry at a Glance

Industry Definition:

- Industry operators primarily selling fast food including burgers, pizza, sandwiches, fish & chips and sushi.
- Produce used in fast food is often purchased from wholesalers in its raw state and then transformed into fast food at store premises.
- Mobile food vans and milk bars that predominantly sell takeaway food and drinks are included in the industry.

Key Statistics Snapshot – Australia ¹

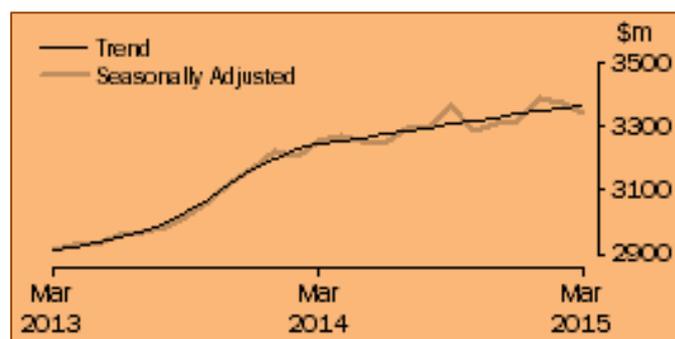
Revenue	Annual Growth 10-15	Annual Growth 15-20
est. \$14.2bn	0.7%	2.7%
Profit	Wages	Businesses
est. \$810.3m	\$2.8bn	25,141

The primary activities of this industry are:

Hamburger retailing, Cooked chicken retailing, Pizza retailing, Fish and chips retailing, Sandwich retailing, Juice bar operation, Sushi retailing, Mobile food truck operation

There are reported to be 25,141 Fast Food establishments across Australia earning a total of \$14.2 billion and employing 214,265 people. Industry revenue is forecast to rise by an annualised 0.7% over the five years through to 2014-15.²

The trend estimate for Cafes, restaurants and takeaway food services rose 0.2% in March 2015. The seasonally adjusted estimate fell 1.1%. By industry subgroup, the trend estimate rose for Cafes, restaurants and catering services (0.4%) and fell for Takeaway food services (-0.3%). The seasonally adjusted estimate fell for Takeaway food services (-2.2%) and Cafes, restaurants and catering services (-0.3%).³



The National Retail Association Research Division indicates that consumer spending in the takeaway food subgroup will increase throughout 2015, with the national positive growth trend expected to continue through to the end of the 2014/15 financial year. The most recent figures (January 2015) from the Australian Bureau of Statistics indicate that Western Australia received a growth of 13.5% in takeaway food sales.⁴

The mature life cycle stage for this industry is evident with industry value added growing at an average annual rate of 3.1% over the ten years through 2012-18 compared with average GDP growth of 2.9% per annum over the same period.⁵

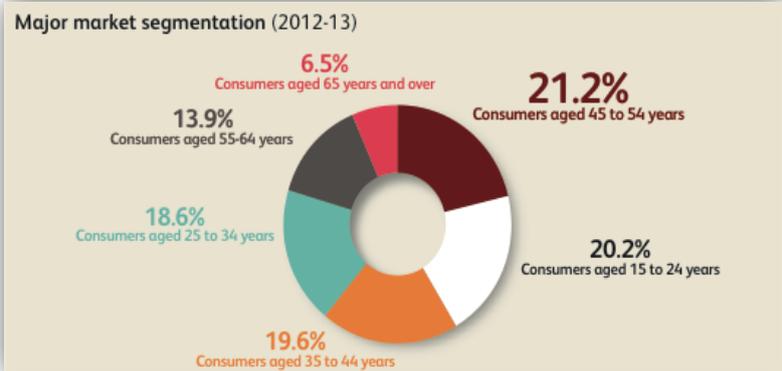
The Fast Food market in Australia has experienced a vigorous growth over the last decade as Australians are making eating out a way of life. McDonald's continue to be the most popular chain, followed by Subway, KFC, Hungry Jack's and Dominos.

Less than 40% of patrons utilise the dine-in facilities offered by fast food outlets.

The majority of visits are drive-thru or take-away meals.

Cafes (*restaurants serving coffee and light meals*) are still the most popular destinations for dining out. Cafes are further supported with additional visits each month by customers to buy coffee, snacks or other drinks.

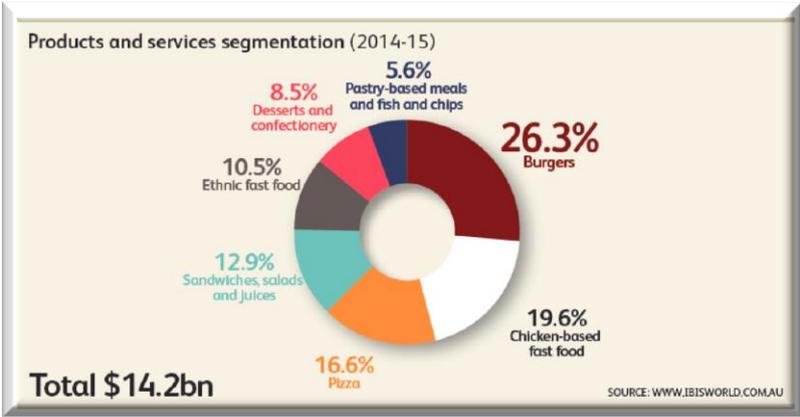
IBIS World's 2013 report on "Fast Food Services in Australia" shows that consumers aged 45 to 54 years make up the largest market for the fast food industry. This particular age group comprises 21.2% of the market, and is mostly households with working mothers. The 15 to 24 years group is the second major market, made up of young professionals, university and TAFE students. This group makes up for 20.2% of the market and is usually looking for value for money, mostly taking advantage of various promotions and deals offered by retailers. Consumers aged 35 to 44 years comprise 19.6%, followed by those aged 25 to 34 years accounting for 18.6% of the market. The smallest market in the industry is consumers in the higher age bracket such as those aged 55 to 64 years, making up 13.9%, while those aged 65 and over comprised 6.5%.⁶



Source: www.ibisworld.com

Price and convenience are the most important factors in determining which fast food chains are visited. “Taste” was ranked by only 8 per cent. “Healthy choice” offers was a key factor for 28 per cent of respondents.⁷

In segment terms 26.5% is spent on burgers, 19.7% on chicken, 16.6% on pizza, 12.6% on sandwiches, salads and juice bars, 10.5% on ethnic fast food, 8.5% on desserts and confectionery and 5.6% on pies, sausage rolls, pasties, and fish and chips.⁸



Source: www.ibisworld.com

For the production and sale of domestic food products, businesses must adhere to the standards put in place by regulatory body Food Standards Australia and New Zealand (FSANZ). FSANZ's main responsibility is to develop and administer the ‘*Australia New Zealand Food Standards Code*’ (the Code), which lists requirements for foods such as additives, food safety, labeling and GM foods.

The Market

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.

Until recently fast food was dominated by hamburgers, chicken and fish & chips, generally the consumer attitude and historical image of fast food was that it is conveniently located, cheap, and somewhat unhealthy. Today consumers are looking for healthier choices. The “healthier choice” requirement was realised by the national chains outlets, and individually they undertook a health kick review that resulted in a gradual change in their product and marketing mix. Patron wants in this area will be an on-going factor that will maintain its presence and gain momentum as industry promotes a healthier product image.

Informal consumer discussion and outlet observations indicate that there has been significant patron support increases in brand growth of companies that have promoted the healthier choice and nutritional benefits of their product.

Over the past five years, there has been a significant shift in Australia’s food culture. Greater emphasis has been placed on premium meals and the quality of the ingredients used in food. Fast-food operators have faced increasingly strong competition from external sources.

Supermarkets have expanded their range of home-cooked meal replacements and heat-and-serve products such as pastas, stir-through sauces and pre-packaged mini-meals. These retailers have emerged as one-stop convenience shops to provide consumers with fast, affordable and high-quality food that is ready in the shortest amount of time. Many of these products have become direct substitutes for traditional fast food.⁹

The popularity of chain outlets at the expense of independent fast food operators continues to hold up while there are shifts in the popularity of various fast food alternatives.

Industry operators have responded with the introduction of a range of healthier, premium choices with less fat, sugar and salt.

Fast food evolution

Australia is often compared with Canada, and there are very definite cultural and economic similarities between the two countries. The fast food trends in Canada are therefore of interest to Australia and in particular those involved in the commercial food service industry that supplies this sector.¹⁰

Despite any progress made through adopting international trends by offering and promoting healthier food and alternative choices, the fast food industry needs to be aware of wider problems with increasing competition between the rapidly emerging Quick Service Restaurants (QSR's) and Limited Service Restaurants (LSR's).

In today's market, food service providers are considered to be classified within in one of three sectors:

Quick-Service Restaurants: Quick-service is the term for restaurants that capitalise on speed of service and convenience. Fast-food restaurants often fall under the umbrella of quick-service restaurants, but not all quick-service places serve fast-food. Quick-service restaurants are characterized by simple décor, inexpensive food items and speedy service.

Limited Service Restaurants: Establishments patrons order or select items and pay before eating. Food and drink may be consumed on premises, taken out, or delivered to customers' locations. Within this segment there are some traditional fast-food locations that focus on fast service and affordable pricing, and fast-casual concepts which have a more upscale menu and ambiance and focus on made-to order foods.

Full Service Restaurants: Establishments with a relatively broad menu along with table, counter and/or booth service and a wait staff. These establishments offer meals and snacks for immediate consumption primarily on the premises, though they may also offer take-away service.¹¹

Unlike the predominately chain driven fast food franchises, concept restaurants generally have lower start-up costs, lower-risk and has the flexibility to introduce cheaper and more flexible business models.

Technomic's *The Canadian Future of LSR: Fast-Food & Fast-Casual Restaurant Consumer Trend Report* examined consumer behaviour, attitudes and preferences toward fast-food and fast-casual restaurants based on survey results from 1,000 consumers. The report provides an in-depth look of year-over-year findings on menu development at fast-food and fast-casual chains and found the following trends:

- LSRs are becoming the driving force behind the commercial food service industry in Canada. Limited service chains accounted for nearly three-quarters of the Top 200 Canadian chain sales
- Fast-food patronage thrives on its convenience and value, while food distinction and ambiance are key factors driving patronage at fast-casual locations. There is a blurring of the lines between fast-food and fast-casual restaurants
 - *fast-food restaurants*: are offering higher quality more healthy food in an updated, more upscale setting,
 - *fast-casual restaurants*: are strengthening areas of value, convenience and speed of service.
- Fast-Food dominates, overall patronage is much higher at fast-food restaurants than at fast-casual concepts; while 30% of consumers visit fast-casual restaurants at least once a week, nearly twice as many (59%) patronise fast-food concepts weekly
- Patronage peaks at lunch – consumers visit fast-food and fast-casual restaurants for lunch more often than for any other meal
- Breakfast menu items are on the rise –LSRs breakfast grew by 17% on fast-food menus and 13% on fast-casual menus between 2009 and 2011.

Fast casual restaurants have expanded over 30 per cent in the past five years, compared with 5 per cent for traditional fast-food outlets.

Major players are closely watching the rise of the "fast casual" dining sector. The trends that have been identified are being driven by younger consumers and the fast-food giants are reinventing and re-branding themselves trying to keep up.

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It was reported in the *Sydney Morning Herald* - January 11, 2015 that fast casual restaurants are the quickest-growing segment of Australia's food market and fast-food giants are under attack from the rise of the upmarket chain restaurants. The growth of so-called fast casual chains such as Grill'd, Nando's, Mad Mex and Coffee Club are eating away at the market shares. Several of the major fast food chains are currently addressing the issue.

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Late in December 2014, the McCafe next to Sydney's Royal Prince Alfred Hospital changed its name to The Corner *by McCafe*, removed all the Golden Arches and started selling kale salads and tofu. The Corner is a radical departure from formula and is McDonald's initial response to consumer demand for healthier food and quality coffee and it's the first of its kind in the world.¹²

McDonalds is not the only fast food giant responding to the change:

- KFC is planning to launch a "high-end" concept store in Parramatta called KFC Urban and has applied for a liquor licence for its outlet.¹³
- Red Rooster is upgrading restaurant interiors.
- March 2015 has seen two Australian food brands, Red Rooster and Sumo Salad partner up in order to allow Sumo Salad being served in more than 350 Red Rooster restaurants nationally.
- Red Rooster has removed all artificial colours, flavours and added MSG from the kitchen made menu, giving customers the option to swap chips for a salad.¹⁴
- Sumo Salad has launched a new concept store in 2015 called Green Label in Sydney. Sumo Salad Green Label has a strong focus on the provenance of its ingredients, using seasonal produce, local suppliers and products made in Australia. The store features a live kale farm, which will be picked fresh daily and used in meals.¹⁵
- Home delivery is being piloted at a small number of McDonald's, Subway and Red Rooster outlets around suburban Sydney.¹⁶
- Street food influences continue – Rustic, handheld street foods with a global spin pop up as unique and craveable offerings on LSR menus. Consumers are looking for new flavour supplements for their sophisticated palette.

Growing trend of eating . . .

*Healthier –
Natural -
Premium and
Gluten-free
options*

Additionally Doughnut-maker Krispy Kreme have launched a “Grilled” doughnut range in Australia — sweet doughnuts that look like burgers.

- the range consists of two new flavours, the Krispy Slider and Glazed Dog.
- instead of beef, the *Krispy Slider* oozes a glazed chocolate mud cake “patty” and sweet cream “special sauce”, encased in a fluffy doughnut “bun” and topped with a sprinkling of sugar crystal “seeds”.
- the *Glazed Dog* looks like a typical Australian sandwich, it actually contains a sweet cream “sausage”, encased in Krispy Kreme’s caramel iced doughnut “bun” and finished with a smattering of cream “dressing”.

The new Grilled range is a “new world-first” and is part of their mission to provide something fresh, exciting and distinctive.¹⁷

Eating Healthier – Natural -Premium and Gluten-free options and the growing importance of better-for-you kids’ meals continue to guide better-for-you QSR and LSR menu development.

Labour and Skills Needs

Information regarding the Fast Food Industry is often embedded within the Retail Industry statistics and reports. To-date specific information relating to the Fast Food Industry has not been available to RAPS Training Council.

Anecdotal evidence suggests, as with Retail, the Fast Food Industry has a high percentage of part-time employees, mostly sourced from the 15 – 24 year age range. Further research undertaken by the RAPS Training Council indicates employment vacancies in Western Australia for Fast Food chains, has decreased by 38.67% from 2011.

Media reports indicate a strong reliance on 457 visas to fill vacancies, particularly in the fast food industry.¹⁸

Entry point to this Sector is at Certificate II. All core units of Certificates II, III and IV are provided from the Retail Training Package, with streamlined electives being offered to suit the Fast Food stream at the employees’ workplace.

The SIR07 v2 Retail Services Training Package included 10 retail industry specific qualifications, six revised and four newly developed, ranging from AQF Certificate I to Vocational Graduate Certificate level. The new qualifications address job outcomes in fast food, supervisory and management and business to business environments.¹⁹

Impact of Government Policy/Decisions

The removal of the Federal Government employer incentives for Certificate II level traineeships has shown a marked decline in numbers while the numbers in training in Certificates III and IV are not showing an increase to compensate for this decline.

The requirements of industry appear to have been overlooked with policy decisions being made without consultation with industry and the potential workers it most affects.

The Retail and Personal Services Training Council of Western Australia undertook a survey in late 2013 to establish reasons for the decrease in uptake of Certificate II, III and IV within its respective industries. The report on the results collated found that commencements in Certificate III in Retail Operations declined from 1,330 in 2011 to 780 in 2013. The main reason employers cited for not employing trainees was the withdrawal of employer incentives.

Additionally, the Australian Workforce and Productivity Agency (AWPA) conducted a Retail Workforce Study in March 2014. The study recommended that the Government provide funding for Certificate II level qualifications in Retail service sectors where a Certificate II is demonstrated to be the industry standard entry level qualification, and preferably where the training is integrated with structured workplace learning.

Deregulated trading hours

The Australian National Retailers Association (ANRA) has called for unrestricted retail trading hours which would allow all shops to have the option of trading 24 hours a day, seven days a week with the exception of Christmas Day, Good Friday and the morning of Anzac day.²⁰

Coles and Woolworths support the call for national consistency of retail trading hours stating that it would improve economic growth, reduce cost-of-living pressures on consumers and help stores compete against online retailers.²¹

The Australian Retailers Association (ARA) Executive Director Russell Zimmerman said although the ARA supports the retail industry trading hours, caution must be taken to keep smaller independent businesses alive. Mr Zimmerman stated that the call for uniform trading hours may assist in economic growth in the short term, however smaller businesses will be unsustainable with the pressures it will involve, and long term it may not prove to give positive economic growth. If consumers want longer trading hours, then employment cost and penalty rates must also be part of the discussion, without penalty rates being reviewed, wages and on costs will be unsustainable for the independent retailers in Australia.²²

The main union representing retail workers, the Shop Distributive and Allied Employees' Association argues the main challenge facing industry is online sales by overseas retailers, not labour costs and "sees no justification in any further extension of retail trading hours".²³

The western Australian Government has indicated that there will not be any further changes to trading hours until after the next election in 2017.

Western Australia

A study conducted in by Patterson Research Group for independent grocers revealed that almost nine out of ten (88per cent) of metropolitan shoppers believe that current shopping hours are adequate for their needs.

The study showed satisfaction with the current system was not influenced by gender, with 88 per cent of men and the same number of women saying they were satisfied. Three quarters of those in the 18 to 39 age group were satisfied with current hours.

The WA Independent Grocers Association president, John Cummings, said results were a damning indictment of unsupported claims by major national retailers and big shopping centre owners that consumers were demanding more shopping hours.

As we have seen elsewhere, deregulation will result in national and multinational retailers weakening and/or destroying their smaller competitors. The negative effects of deregulation would be amplified in WA as a consequence of the state's rapidly cooling economy.²⁴

Since the introduction of Extended Trading Hours a significant change in the employment structure has been identified within small business. A dramatic swing from full-time employees in favour of part-time and casual status has occurred broadly across the industry. This trend also applies to large retail operations.

A survey conducted by RAPS into the extended Christmas Trading hours of 2014/15 revealed that micro and small business had no direct business benefit from the additional trading hours

and most stated that they fell short due to lack of support from consumers. It appears that supermarkets and major shopping centres that are national brand dominates were the main beneficiaries.

Penalty rates

Penalty rates continue to be an issue for small business and many have stated that they are unable afford to trade the extended hours. Most believe that the introduction of Extended Trading Hours has caused staffing problems in getting staff willing to work; and the cost of staffing. This has been confirmed by most micro and small retailers RAPS have consulted with. In all cases the initial staffing requirements for Sundays are generally filled by the Proprietors of the businesses.

Over 70% of the retailers consulted believe that penalty rates for weekend trading should be reviewed, removed or at least reduced.

Following a decision by the Fair Work Commission (FWC) on the Restaurant and Catering award to reduce penalty rates by 25% on Sundays for casual employees, the Australian Retailers Association (ARA) is hopeful they will see a common sense outcome in this year's Retail Award Review due later this year.²⁵ Discussions on this issue are currently on going.

Regional Aspects

Although there are no identified shortages in the fast food industry, due to the crowding out effect, the lack of availability of skilled labour and a lack of accommodation to house workers in regional areas impacts on all the service industries.

During consultations with stakeholders in the Goldfields and Esperance regions, RAPS became aware of the limited career opportunities available to females in these regions.

There is also a need to develop training programs for Indigenous youth, particularly females in the Broome and Fitzroy Crossing regions.

Technological

The Australian consumer has embraced regular access of technology using all communication formats. At the end of June 2011 there were 10.9 million active internet subscribers in Australia.²⁶ By August 2014 this had nearly doubled to 21.2 million. Similar growth was also seen in social media and active mobile phone subscriptions.²⁷



This growth resulted in new and advanced models being introduced with additional program features. Optimising this, a clear indication of increased marketing opportunities became evident and a multitude of App programs became available. Many of these were offered as Free Apps.

itakeaway a 100% Australian owned and operated company was one of these.

itakeaway was the first company worldwide to develop and offer an online iPhone, iPad or iPod Touch App for ordering takeaway food.

The system has helped generate more business for restaurants and takeaway food outlets and at the same time make it more convenient for consumers to order from the widest variety of foods possible. Recognising that 1 in 33 people in Australia have an iPhone or iPod Touch, an interactive self-administered website was developed that would save the restaurant time, staff and money. It also enables consumers to order takeaway food online with a free iPhone, iPod Touch or iPad App. Another feature of itakeaway is the use of Google Maps, whereby if you are out of town or in an area you're not familiar with, you can still order takeaway and locate the restaurant easily.

Business owners will no longer have to invest in costly website, iPhone, iPod Touch or iPad design and development as itakeaway has produced all the technical software for them.

itakeaway's interactive website is dynamic in that restaurant orders are automatically generated and confirmed, customer databases are automatically updated and the restaurants receive comprehensive financial and sales reports as well as live online technical support 24/7. The technology is designed to streamline takeaway operations by freeing up staff attending to phone orders, providing total accuracy with each order and eliminating the 'stand-up order', with the added benefit of not having customers standing around the entrance waiting for their orders. Over 300 businesses have already signed up and many more are doing so on a daily basis.²⁸

Furthermore, during 2015 Domino's Pizza will install GPS tracking to its delivery vehicles so customers can see exactly where their pizzas are. The technology upgrade comes after the company rolled out its Pizza Tracker in Australia which includes a feature where pizza eaters can Chromecast their pizza tracker to their TV.²⁹ The introduction of this technology is a significant investment in the delivery side of the business.

The GPS Driver Tracker technology will commence across all stores in Australia during July 2015.

Domino's will create 3000 new jobs in Australia and New Zealand the biggest intake of employees in the company's history. The intake of new employees comes as Domino's prepares to support and manage the increased volume of deliveries expected to come from the introduction of this technology.³⁰

Sustainability

More and more restaurants, cafes and fast food outlets are choosing to make sustainability a priority for their business model to better benefit their overhead and their customers. Many fast food companies are going to great lengths to reduce their footprints on the environment mostly with little fanfare. In the US many companies that have made large strides in adopting sustainable food service practices and waste reduction practices.

The New York Times published this news along with a brief overview of how some food-service businesses are working to cut costs and product waste without slashing quality.

KFC, are introducing edible coffee cups, an innovative and money-saving menu item that they will be market testing in Britain - heat-resistant white chocolate, these sugar wafer cups have the potential to cut cost and waste numbers.

Starbucks cups, sleeves and napkins are source from recycled paper products. They also partner with communities to recycle their old coffee and espresso grounds to benefit community and private gardens.

Other fast food industry sustainability efforts include:

- sourcing from post-consumer made products – packaging, wrapping
- serving free-range or organically sourced menu items and adding more vegetarian-friendly options
- using suppliers who have sustainable, ethical, and low-impact practices
- reducing food waste and waste related costs
- in-restaurant practices – lighting, reducing energy waste
- sustainable water usage
- climate and energy activism³¹

Being predominately US based chain outlet driven many fast food outlets in Australia are realising the social and economic benefits of sustainable practices.

Recently Eagle Boys Bundaberg (Qld.) participated in an energy efficiency project which aimed to:

- Identify the most significant energy consumption equipment in store
- Identify opportunities to address easy changes that convert into immediate cost savings; and
- Calculate a benchmark for continuous improvement

By completing an Energy Audit, store management identified a total of 18 opportunities for improvement of which 15 were implemented with success. After the implementation of the program was complete, the annual electricity consumption of the store decreased by 27% while annual gas consumption decreased by 13%.³²

Some of the actions implemented include:

- Changing out halogen downlights to LED alternatives
- Placing timers on freezers to switch-off between the hours of 12 midnight and 6.00am
- Installing an air-curtain in cold room to restrict the amount of cooled air lost into a heated environment
- Stocking all refrigerated deliveries directly into the cold room
- Calibrating pizza ovens to ensure optimum gas flow and temperature control

Qualification Profile of Workforce

Entry point to this Sector is at Certificate II. All core units of Certificates II, III and IV are provided from the Retail Training Package, with streamlined electives being offered to suit the fast food stream at the employees' workplace.

Specific fast food qualifications currently being delivered in Western Australia are:

- Certificate II in Retail Fast Food

Continuous Improvement

The SIR Retail Services Training Package is currently undergoing the continuous improvement process to ensure it meets the needs of industry and the Standards for Training Packages. It is anticipated that this will be submitted for endorsement in late 2015 and the Certificate II in Retail Fast Food will be removed from the Training Package.

Issues, Barriers and Opportunities

The negative perception of employment within the Fast Food Industry is a concern as many describe it as a "dead end job" where workers suffer from stress, underemployment and reduced job and life opportunities.³³ Fast Food is seen as a form of secondary labour employment characterised by low pay, poor working conditions, little training, little chance of advancement and high staff turnover.

The Federal Workplace Ombudsman is concerned that large numbers of young people and migrant workers might be being short-changed by Fast Food employers. The State Director reported the preliminary findings of random audits of the Fast Food sector suggest there is a lack of awareness among employers of their workplace obligations. The Western Australian office is asking more than 230 take-away outlets to open their books as part of a nation-wide food services campaign. Of employers audited in WA so far, 48 per cent had breaches - mostly minor - but many relating to underpayment of staff. Maximum penalties of \$33,000 apply to breaches of the Workplace Relations Act.

Emerging Occupations

There are no identified emerging occupations.

Declining Occupations

There are no identified declining occupations.

ENDNOTES

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