



QUICK SERVICE RESTAURANT



inColour

June 2024

Interact: [AreaSearch.com.au/incolour/qsr](https://www.AreaSearch.com.au/incolour/qsr)

CONCENTRICS

Introduction

Putting retail performance in perspective on a sector-by-sector basis, the 'inColour' series aims to serve as a yardstick for those seeking to action assets and locations likely to outperform, while operating in a timely and efficient manner.

To help owners best secure and position assets, the AreaSearch approach to retail analysis looks beyond the standard 'population per store' approach commonly referred to in the industry. Instead, our approach which we call 'concentric radials', assesses each retail location and its competitiveness, by gauging proximity to, and likely capture of, its local target market considering the intersecting property catchments of each surrounding retailer in its peer group. This integral component of the assessment process draws on a deep database of **hundreds of thousands of retail locations** across the country, and cross-references that against every verified address and resident location in Australia.

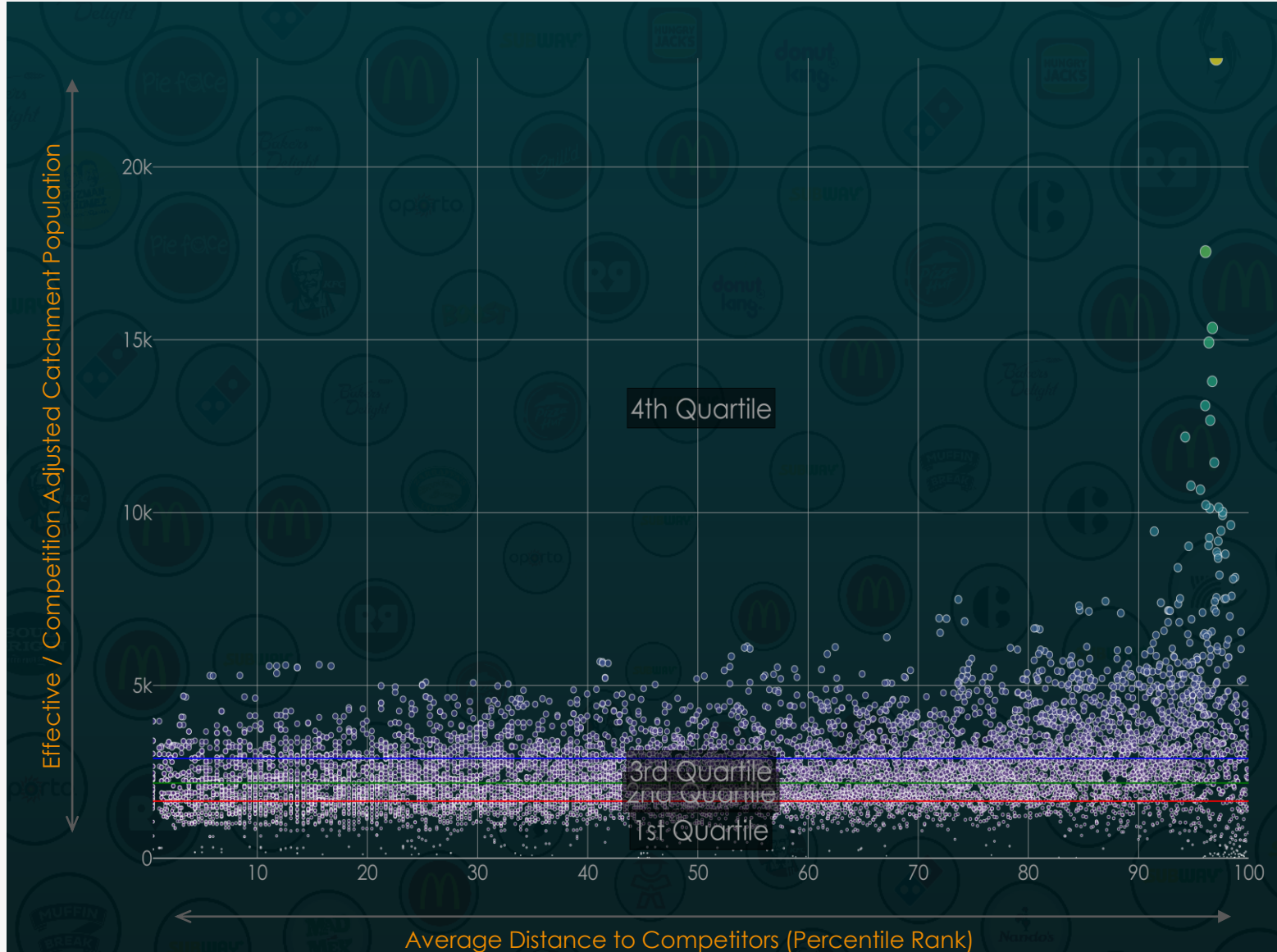
The national results of this from one perspective are shown in the adjoining chart. With an average of 2,667 people per QSR location nationally, and a standard deviation of 1,225 in the effective population capture of the average QSR catchment, this research highlights large variations across regions, pointing to both opportunities and risks for sector participants.

We hope this approach provides a fresh perspective and opens new opportunities for our clients, such as that detailed overleaf. For those seeking further information on our process or results, please reach out at areasearch.com.au/contact

Covering 53 major QSR brands across 9,800 locations nationwide



[Click for individual brand detail.](#)



Australia's QSR Market

The Quick Service Restaurant sector sees a growing range of operators and offerings catering to the diverse tastes of Aussie residents. With significant interest from property investors due to its consistent demand, attractive returns, and the 'set and forget' nature of lease terms offered by some of the larger operators, recent years have seen yields lower than 3% for certain drive-thru assets. Notably, the sector demonstrates higher resilience to economic shocks than traditional restaurants, with the more affordable takeaway option generally seen as an acceptable alternative for households when dining out becomes less feasible. Forecast population growth exceeding OECD averages in Australia (see [EcoSearch](#) for our monthly economic review) provides further buoyancy to the sector which has seen 5.4% in year-over-year growth to Apr-24 with total moving annual turnover now amounting to \$24.1 billion. Meanwhile, the level of activity in the sector remains high with recent months seeing a net increase in the number of locations.



2,736
Effective
Population



0.07km
Nearest
Peer *



3.62km
Nearest
Network *



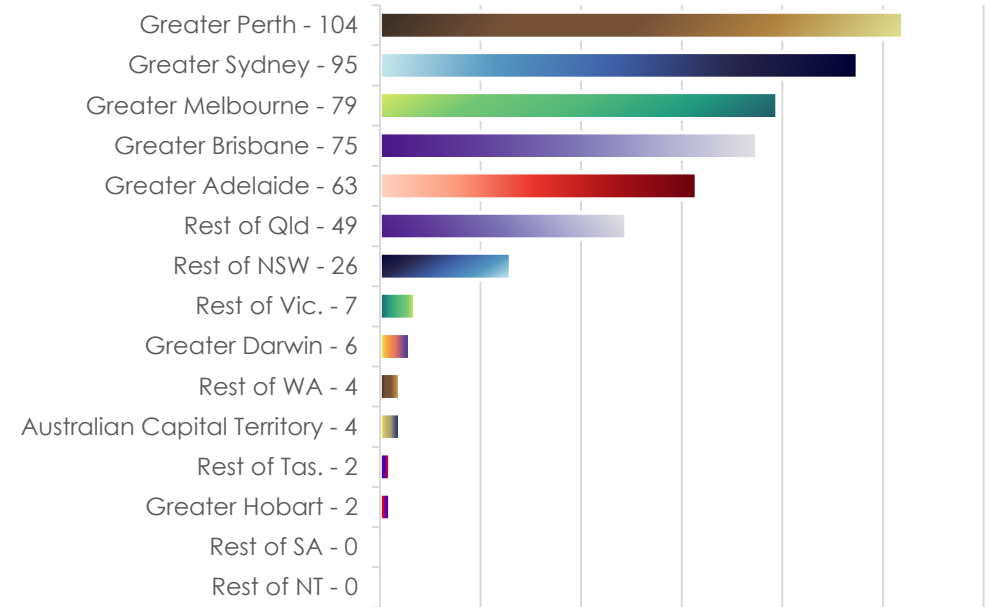
1.10km
Nearest to
Residents *

See final page for breakdown by brand..

* Median

Shopping Centre Spotlight

AreaSearch analysis of major fast food brand coverage across Australian shopping destinations has identified 516 shopping centres where the 'effective population' metric exceeds that of its broader region while 118 of these were found to have over two times the regional average.



'In the same day we can identify a tenant need in our centres, have exceptionally detailed analysis done, generate a compelling format as a leasing handout for potential tenants, and receive a definitive list of the best tenants to target across each category of retailer. That's why we use AreaSearch..'

Ben Stewart
Head of Retail and Residential, Mintus



Retail Supply & Demand Assessment

More than mapping.. We are proud to work with some of the biggest names in retail, and in Australian property, helping to identify and action opportunities in under serviced locations across over 30 different retail categories

Going beyond legacy GIS tools, our platform enables easy and instant transfer of insights, removing the burden of data collection, analysis and even report writing, with full consulting standard reports never more than a few minutes away. Whether for a last-minute meeting, or carefully crafted planning submission, our materials are used with confidence by users ranging from the country's largest property institutions to part-time investors.

While this report focuses on the critical 'effective population' statistic, there are a number of other factors we consider when assessing the viability of each project or location we analyse, with the following providing a quick summary.

Resident & Commercial Demand

Demand to supply ratios generated through cross examination of quarterly address-level population counts, land-use, activity and working population statistics, with the latest sector location data, for accurate estimates of daily demand.

Competition Analysis

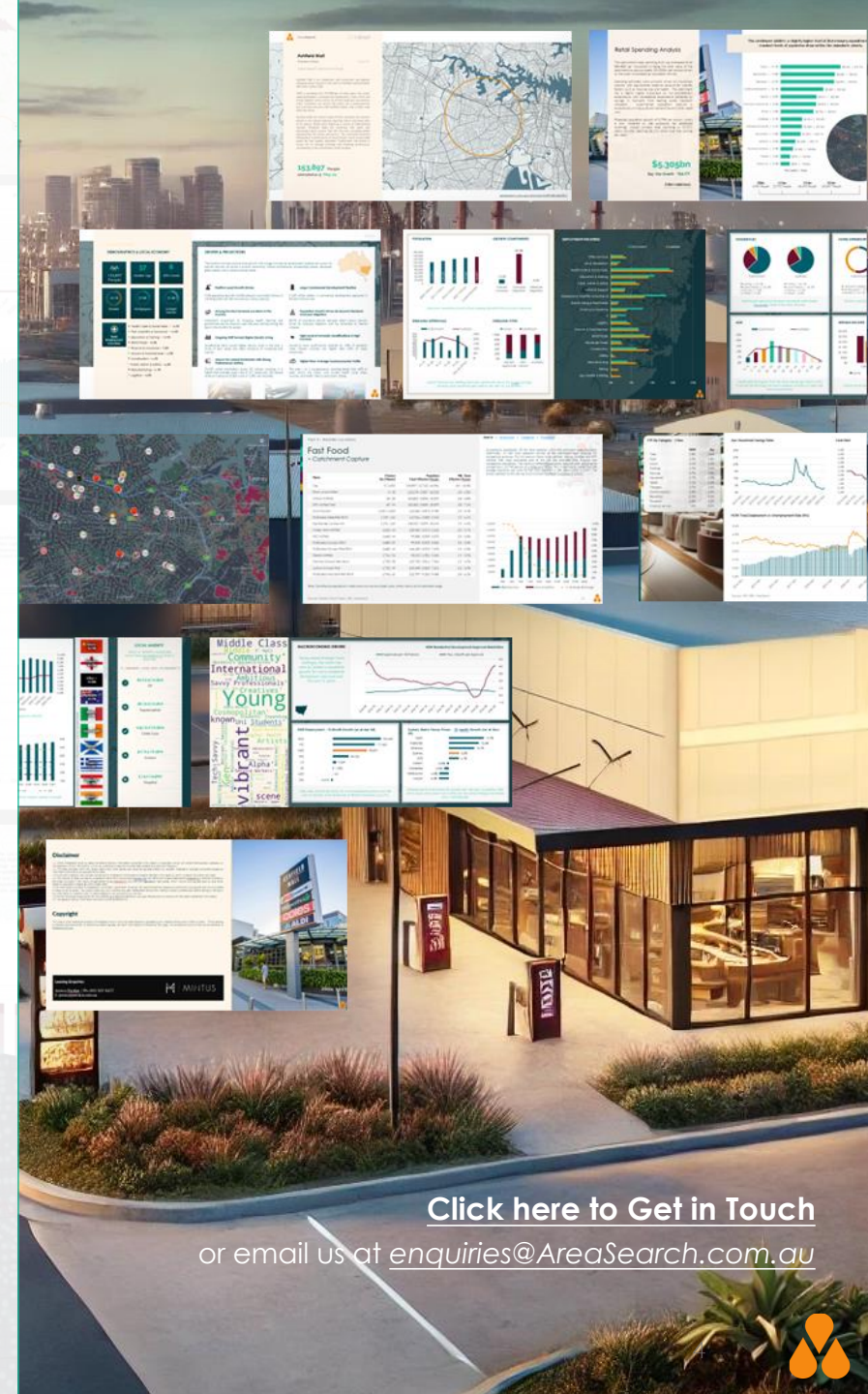
Every location across over 400 major retailers assessed with 'effective population' counts accounting for competitive draw of proximate peers.

Spending Trends & Differentiators

Local income data updated quarterly with analysis of average and median income differentials and spending splits by income, age and household type across primary and secondary catchments to estimate total spend, local differentiators and likely floor space requirements.

Local Economy, Growth & Projections

Local employment trends and population forecasts updated frequently to provide further insight into area trajectories and accurate 2041 spending projections.



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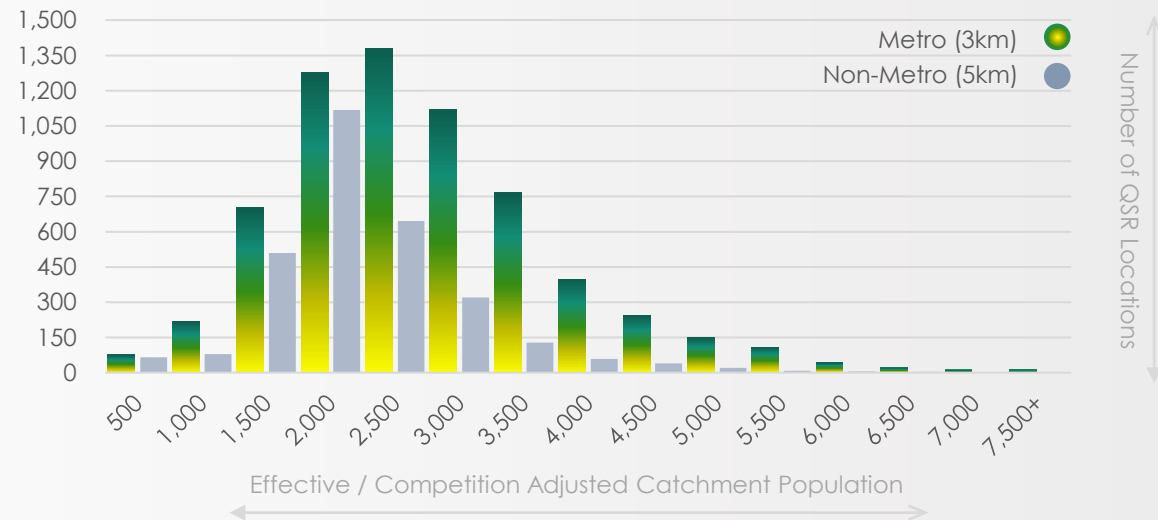
City & State Trends

View interactive detail: AreaSearch.com.au/incolour/gsr

This report, encompassing a total of 9,800 takeaway operations in Australia, reveals significant differences in market composition across the country. These findings underscore the necessity for operators to adopt location-specific strategies when expanding into new regions or optimising existing assets. The 'population per store' indicator, a crucial metric for many retail operators, exhibited substantial regional variation. In greater capital regions, averages ranged from 2,110 in Darwin to 2,868 in Adelaide, while non-metro regions saw averages from 2,294 in Queensland to 7,759 in the Northern Territory. The average travel distance required to reach critical mass also varied across the country, influenced by differences in population density.

The primary insights from this report emerge at the catchment level, where the primary trade areas of each takeaway operation are evaluated in relation to surrounding competitors and their respective trade areas. This analysis revealed notable disparities among the country's operators, with the standard deviation in effective/competition and proximity-adjusted population per store amounting to 48.4% of the average in metro regions and 56.8% in non-metro regions. The subsequent pages delve into the trends observed at the sub-regional level across each state, highlighting differences in typical catchment competitiveness.

Number of Locations By Effective Population Cohort



Sources: ABS / AreaSearch

Average Catchment Metrics *

	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m) **
Greater Sydney	1,867	2,844	86,196	40.0	2,793	1,197	393
Greater Melbourne	1,804	2,793	71,734	35.0	2,815	1,434	474
Greater Brisbane	1,188	2,246	52,341	31.0	2,081	916	525
Greater Adelaide	496	2,868	49,038	22.0	2,727	1,112	579
Greater Perth	1,050	2,129	42,630	24.0	2,080	875	377
Greater Hobart	92	2,756	23,158	13.0	2,407	1,037	768
Greater Darwin	71	2,110	22,877	14.0	1,933	1,057	961
Australian Capital Territory	197	2,328	35,244	18.0	2,345	1,445	364
Non-Metro NSW	971	2,953	38,262	21.0	2,102	953	1,976
Non-Metro Vic.	509	3,126	34,472	19.0	2,200	980	2,500
Non-Metro Qld	1,187	2,294	57,971	38.0	1,841	807	3,156
Non-Metro SA	99	4,078	14,297	7.0	2,177	1,288	12,338
Non-Metro WA	169	3,336	18,639	10.0	2,079	774	20,678
Non-Metro Tas.	83	3,855	27,960	13.0	2,479	853	5,510
Non-Metro NT	17	7,759	15,534	6.0	2,296	1,221	57,400

* Metro - 3km Radial / Non-Metro - 5km Radial
 ** average distance to 3 nearest



Greater Sydney

A total of 1,867 fast food retailers were identified in Greater Sydney. Significant variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition-adjusted) population per fast food catchment ranging from an average of 1,873 in the Sydney - City and Inner South region to 4,074 in Sydney - Inner South West, based on a 3.0km catchment range.

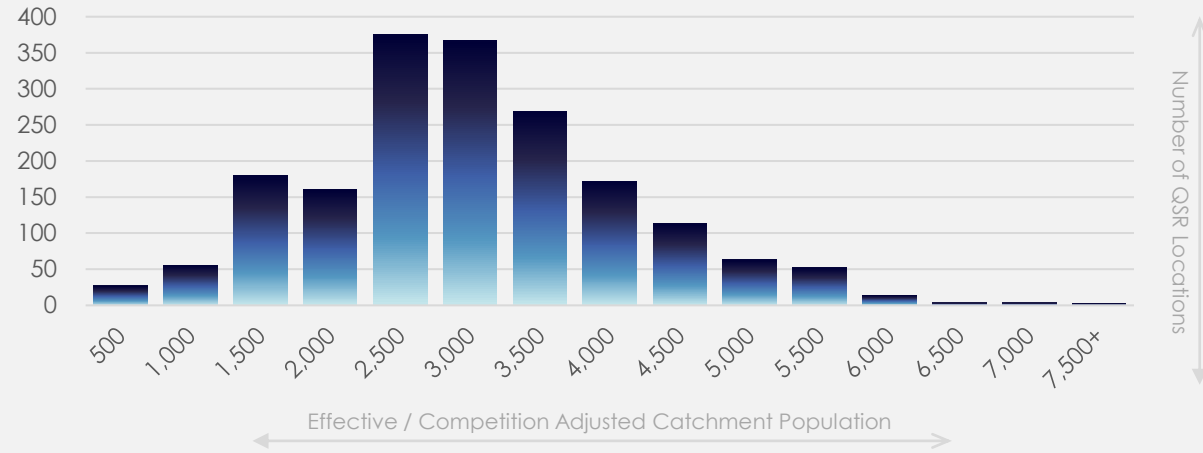
Compared to other metropolitan regions analysed nationally, the effective population capture within the typical QSR catchment in Greater Sydney deviated to a lesser extent (~42.8%) from the average level recorded across all the region's QSR locations. Most catchment effective population counts fall within the 1,600 to 4,000 range.

As illustrated at the beginning of the report, the region is also highly ranked for expansion potential across its existing shopping centre assets, with 95 centres possessing a higher-than-average ratio of people per takeaway operation. Additionally, the typical resident in the region has more convenient access than in all other regions, with the nearest takeaway operation being 0.72km from home.

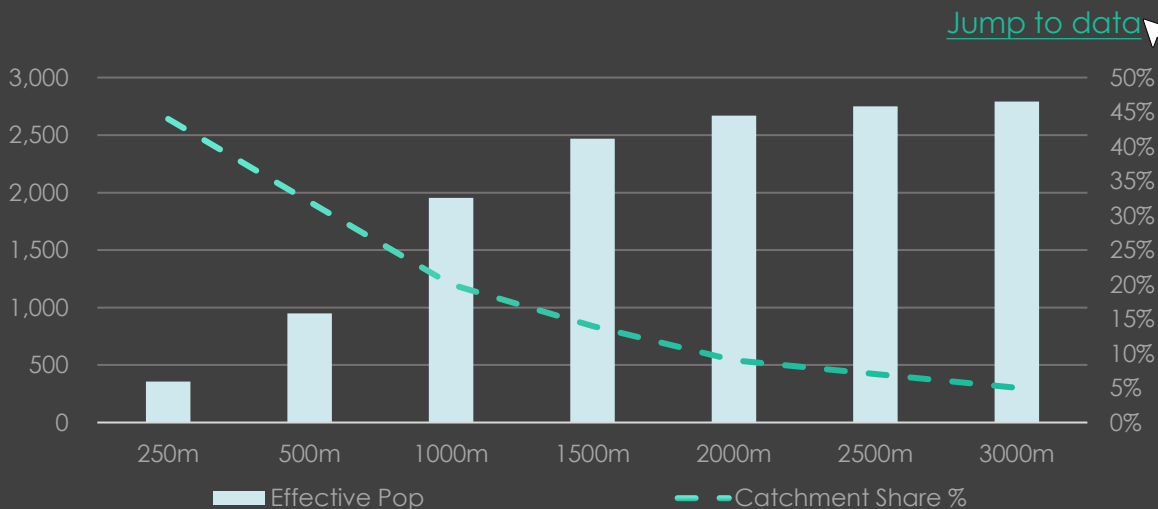


- McDonalds - 201
- Subway - 182
- KFC - 153
- Dominos - 137
- Other - 1194

Number of Locations By Effective Population Cohort



Average Store Catchment Capture



Average 3km Catchment Metrics

	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Baulkham Hills and Hawkesbury	88	3,096	56,111	20.0	2,759	1,519	801
Blacktown	153	2,727	71,509	32.0	2,725	1,027	396
City and Inner South	233	1,459	174,302	121.0	1,873	641	162
Eastern Suburbs	77	3,425	135,946	48.0	3,137	833	247
Inner South West	146	4,164	113,682	29.0	4,075	760	394
Inner West	88	3,475	125,452	38.0	3,379	737	343
North Sydney and Hornsby	124	3,431	90,124	35.0	3,262	882	357
Northern Beaches	80	3,290	59,787	23.0	3,276	1,002	498
Outer South West	128	2,378	40,236	28.0	2,007	858	391
Outer West and Blue Mountains	138	2,441	36,095	28.0	2,090	1,227	629
Parramatta	150	3,326	107,024	39.0	3,360	885	352
Ryde	63	3,250	86,223	25.0	3,408	1,111	340
South West	164	2,977	66,571	24.0	3,144	966	440
Sutherland	77	3,006	58,540	26.0	2,936	610	235
Central Coast	158	2,210	21,081	15.0	1,981	1,418	465



Regional New South Wales

Our latest research has identified a total of 971 fast food retailers in Regional NSW, with moderate variance in the average market composition among the region's SA4 subregions. The effective (competition-adjusted) population per fast food catchment ranges from an average of 1,707 in the Riverina region to 2,604 in Illawarra, based on a 5.0 km catchment range.

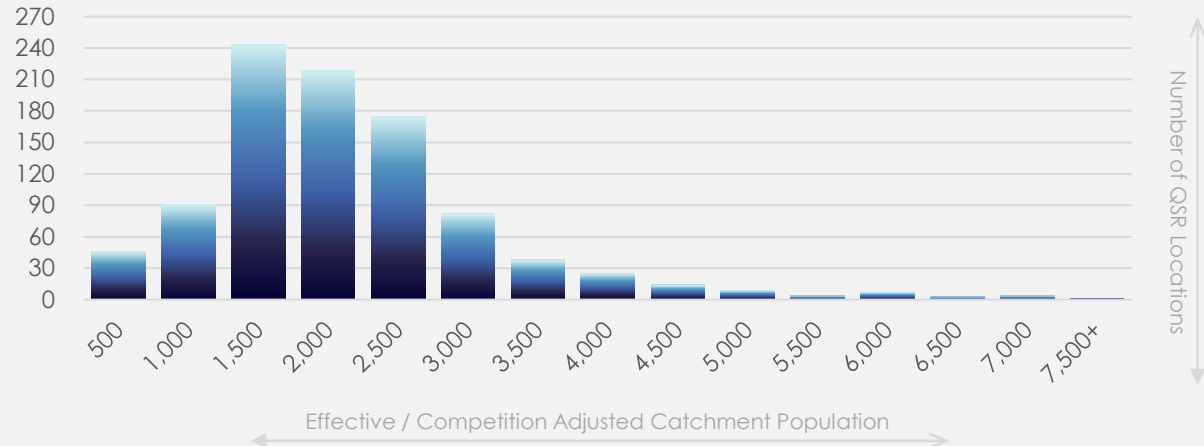
Compared to other non-metro regions analysed nationally, the effective population capture within the typical QSR catchment in Regional NSW deviated to a lesser extent (~33.3%) from the average level recorded across all of the region's fast food locations. This results in the majority of catchment effective population counts falling within the 1,200 to 3,100 range.

As shown at the beginning of the report, 26 existing centres in the region have been identified as having potential for expansion, with an effective population count per major brand exceeding that of the region.

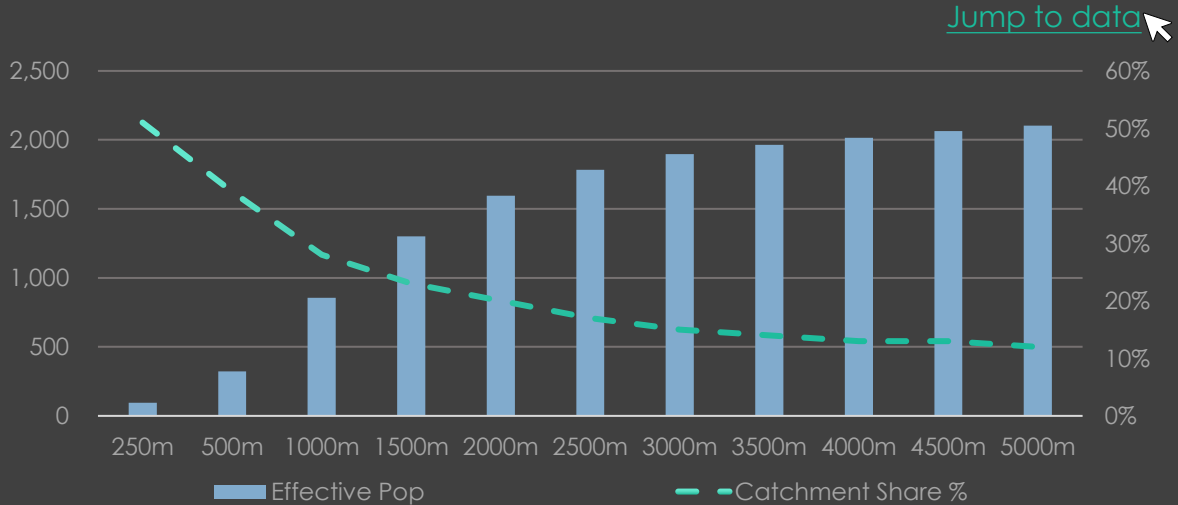


- Subway - 136
- McDonalds - 130
- Dominos - 106
- KFC - 104
- Other - 495

Number of Locations By Effective Population Cohort



Average Store Catchment Capture



Average 5km Catchment Metrics

	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Capital Region	63	3,825	17,764	10.0	1,914	1,366	2,835
Central West	68	3,154	24,832	14.0	1,945	373	915
Coffs Harbour - Grafton	49	3,015	23,481	14.0	1,914	929	3,092
Far West and Orana	37	3,171	28,648	18.0	1,892	657	12,747
Hunter Valley exc Newcastle	117	2,563	24,299	14.0	2,140	927	1,670
Illawarra	117	2,718	53,851	23.0	2,605	1,153	340
Mid North Coast	60	3,879	23,188	12.0	2,086	1,263	1,345
Murray	35	3,563	34,510	27.0	1,942	1,005	3,167
New England and North West	64	2,939	23,642	17.0	1,808	483	2,693
Newcastle and Lake Macquarie	162	2,451	84,442	41.0	2,354	682	562
Richmond - Tweed	77	3,362	27,866	17.0	2,053	1,029	1,325
Riverina	67	2,457	28,868	23.0	1,708	848	3,275
Southern Highlands and Shoalhaven	55	2,953	20,348	14.0	1,932	790	781



Greater Melbourne

Our latest research has identified a total of 1,804 fast food operators in Greater Melbourne, revealing significant variance in the average market composition among the region's SA4 subregions. The effective (competition adjusted) population per QSR catchment ranges from an average of 2,352 in the Melbourne - Inner region to 3,765 in Melbourne - Inner East, based on a 3.0 km catchment area.

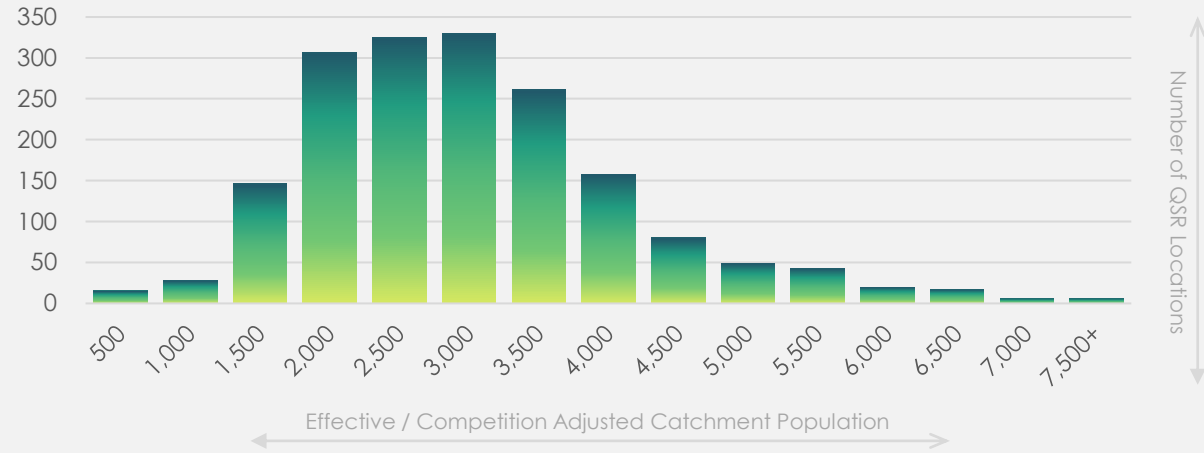
Compared to other metropolitan regions analysed nationally, the effective population capture within a typical QSR catchment in Greater Melbourne deviates by an average rate of 50.9% from the overall average recorded across all of the region's QSR locations. This results in most catchment effective population counts falling within the 1,400 to 4,200 range.

As noted earlier, 79 existing centres in the region have potential for expansion, with an effective population count per major brand exceeding the regional average.

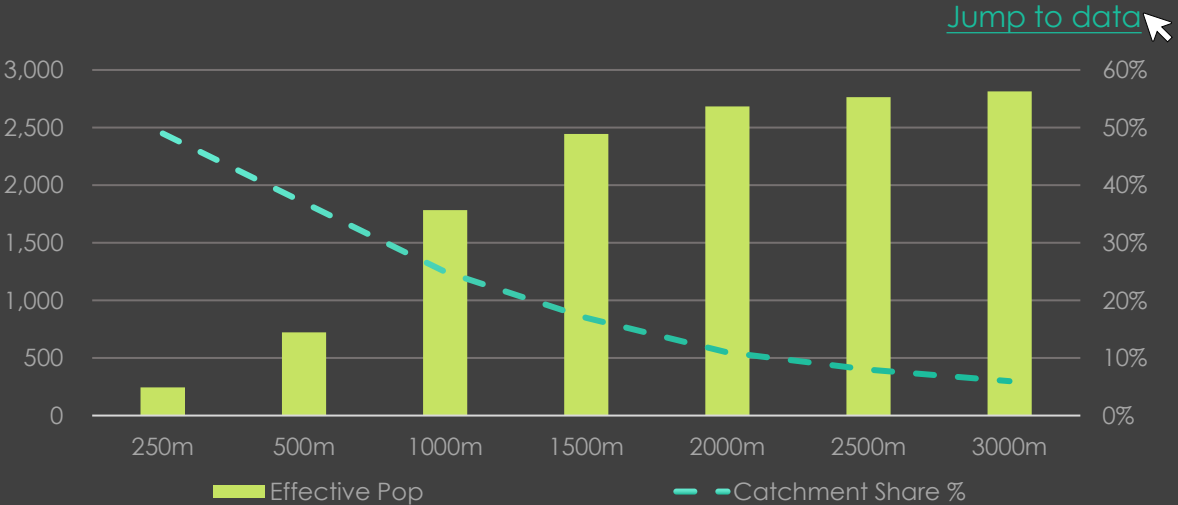


- Subway - 220
- McDonalds - 197
- KFC - 147
- Bakers Delig.. - 134
- Other - 1106

Number of Locations By Effective Population Cohort



Average Store Catchment Capture



	Average 3km Catchment Metrics						
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Inner	296	2,151	160,900	101.0	2,352	1,100	254
Inner East	107	3,545	82,830	27.0	3,766	911	361
Inner South	134	3,202	77,189	26.0	3,443	1,253	400
North East	180	3,072	53,582	18.0	3,102	1,082	593
North West	158	2,762	43,503	19.0	2,580	1,487	552
Outer East	180	2,897	49,229	22.0	2,731	1,501	568
South East	293	3,020	54,189	22.0	2,832	1,497	548
West	340	2,607	52,979	22.0	2,777	1,551	450
Mornington Peninsula	116	2,682	28,496	17.0	2,460	1,794	669



Regional Victoria

Our latest research has identified a total of 509 fast food operators in Regional Victoria, with moderate variance in the average market composition among the region's SA4 subregions. The effective (competition-adjusted) population per QSR catchment ranges from an average of 1,905 in the Ballarat region to 2,517 in Geelong, based on a 5.0km catchment range.

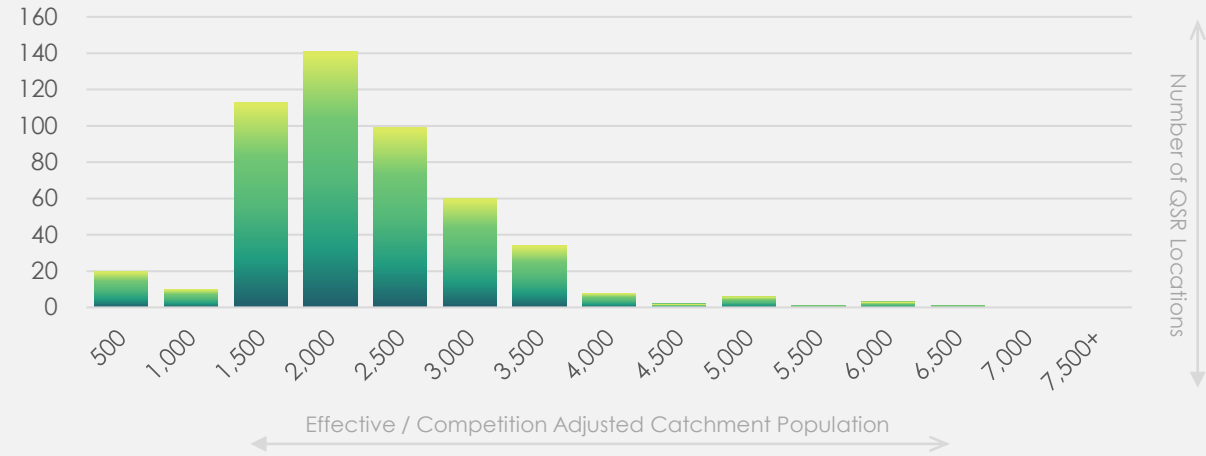
Compared to other non-metro regions analysed nationally, the effective population capture within the typical fast food catchment in Regional Victoria deviates to a lesser extent (~34.2%) from the average level recorded across all of the region's QSR locations. The majority of catchment effective population counts fall within the 1,200 to 3,200 range.

As noted at the beginning of the report, seven existing centres in the region have been identified as having potential for expansion, with an effective population count per major brand exceeding that of the region.

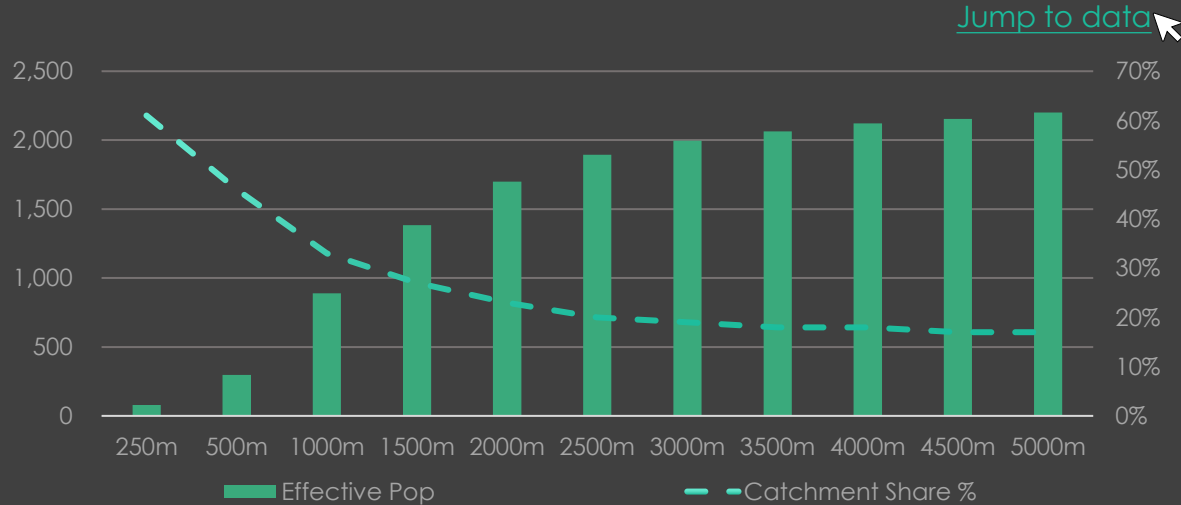


- Subway - 80
- McDonalds - 67
- KFC - 57
- Bakers Delig.. - 55
- Other - 250

Number of Locations By Effective Population Cohort



Average Store Catchment Capture



[Jump to data](#)

	Average 5km Catchment Metrics						
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Ballarat	68	2,592	51,324	33.0	1,905	730	2,969
Bendigo	51	3,314	40,543	20.0	2,497	987	2,439
Geelong	126	2,662	52,011	24.0	2,518	1,349	1,250
Hume	44	4,221	20,759	11.0	2,134	712	4,080
Latrobe - Gippsland	87	3,499	16,461	9.0	2,147	941	2,487
North West	45	3,440	21,344	11.0	1,913	618	4,677
Shepparton	55	2,508	27,050	18.0	1,940	591	1,769
Warrnambool and South West	33	3,871	19,444	10.0	2,185	589	2,570



Greater Brisbane

Our latest research has identified a total of 1,188 fast food operators in Greater Brisbane, with noticeable variance in the average market composition among the region's SA4 subregions. The effective (competition adjusted) population per QSR catchment assessed ranges from an average of 1,756 in the Brisbane - North region to 2,897 in Brisbane - East, based on a 3.0 km catchment range.

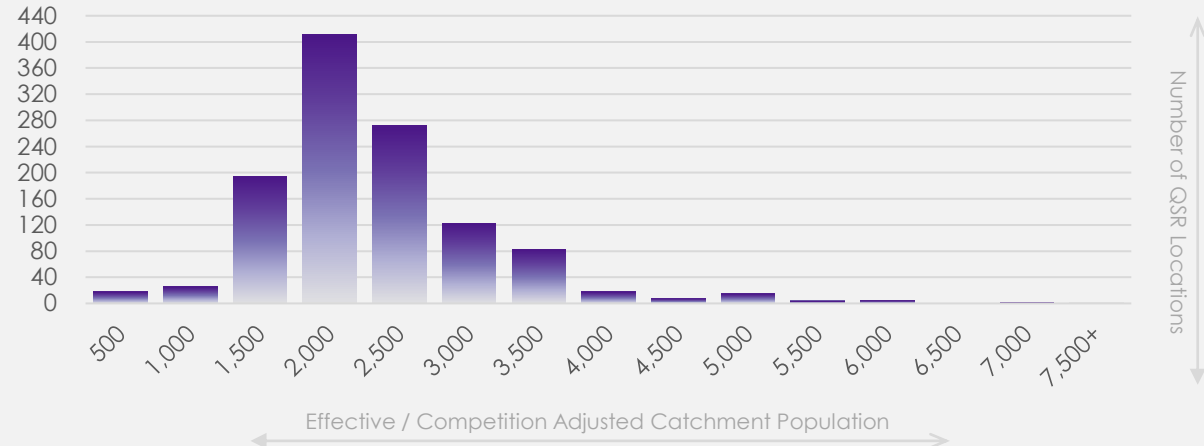
Compared to other metropolitan regions analysed nationally, the effective population capture within the typical fast food catchment in Greater Brisbane deviates at a fairly standard rate of 44.0% from the average level recorded across all of the region's QSR locations. Consequently, the majority of catchment effective population counts fall within the 1,200 to 3,000 range.

As shown in the beginning section, 75 existing centres in the region have potential for expansion, with an effective population count per major brand exceeding that of the region.

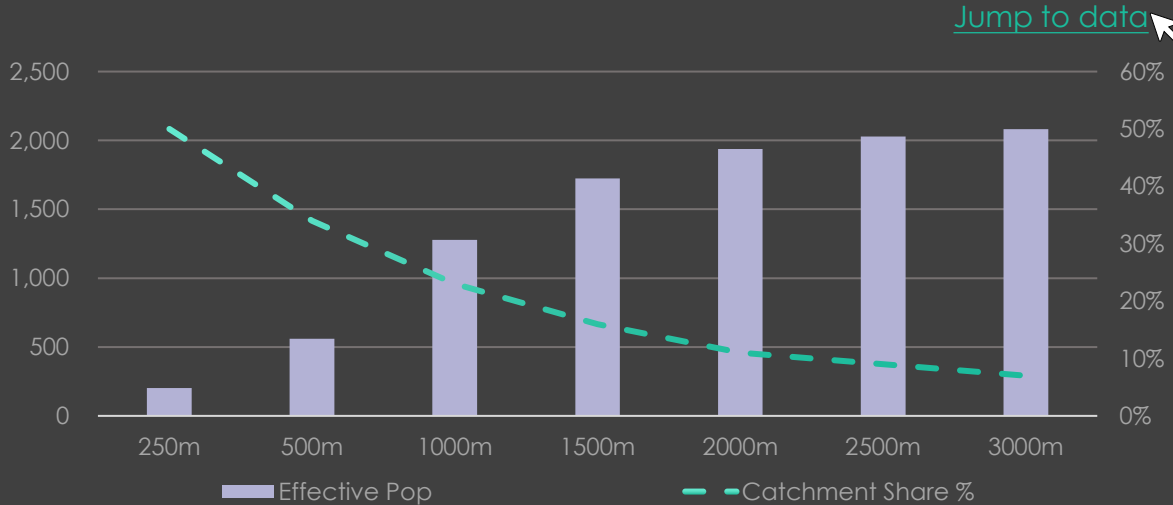


- Subway - 148
- McDonalds - 111
- Dominos - 107
- KFC - 87
- Other - 735

Number of Locations By Effective Population Cohort



Average Store Catchment Capture



[Jump to data](#)

Average 3km Catchment Metrics

	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
East	75	3,290	31,749	14.0	2,897	1,554	577
North	126	1,839	50,323	29.0	1,757	818	400
South	179	2,223	62,096	32.0	2,154	527	359
West	87	2,229	51,980	26.0	2,346	840	382
Inner City	156	1,968	121,916	78.0	1,901	256	292
Ipswich	164	2,457	29,018	16.0	2,012	921	752
Logan - Beaudesert	173	2,207	33,877	19.0	2,098	1,096	470
Moreton Bay - North	120	2,323	30,181	20.0	2,070	1,046	1,172
Moreton Bay - South	108	2,107	42,233	30.0	1,910	737	389



Regional Queensland

A total of 1,187 fast food operators were identified in Regional Queensland. Noticeable variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition-adjusted) population per QSR catchment ranging from an average of 1,495 in the Darling Downs - Maranoa region to 2,524 in the Sunshine Coast, across an adopted 5.0 km catchment range.

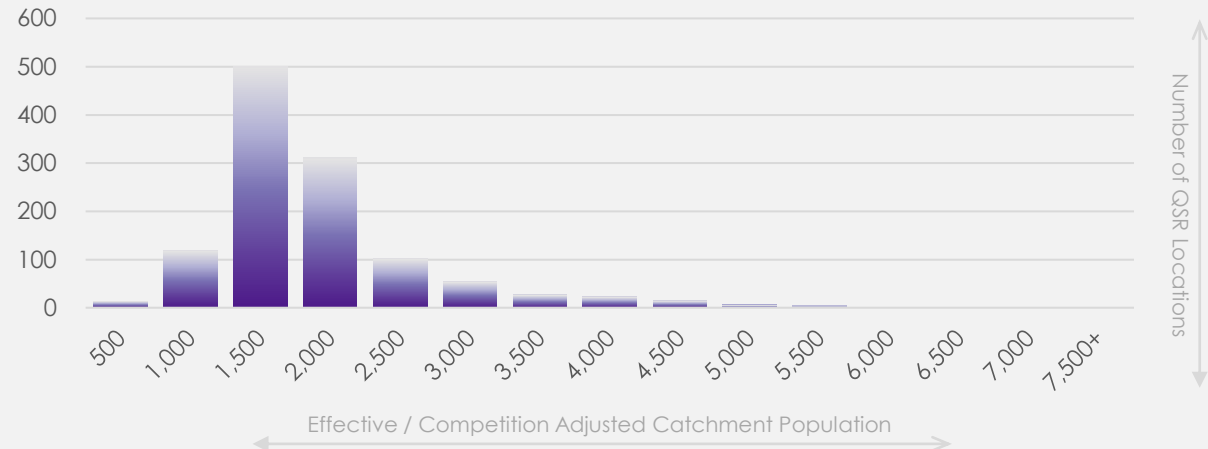
In comparison to other non-metro regions analysed nationally, the effective population capture within the typical fast food catchment in Regional Queensland deviated to a lesser extent (~37.4%) from the average level recorded across all of the region's fast food locations. The majority of catchment effective population counts fell within the 1,000 to 2,600 range.

As noted at the beginning of the report, 49 existing centres in the region have been identified as having potential for expansion, with an effective population count per major brand exceeding that of the region.

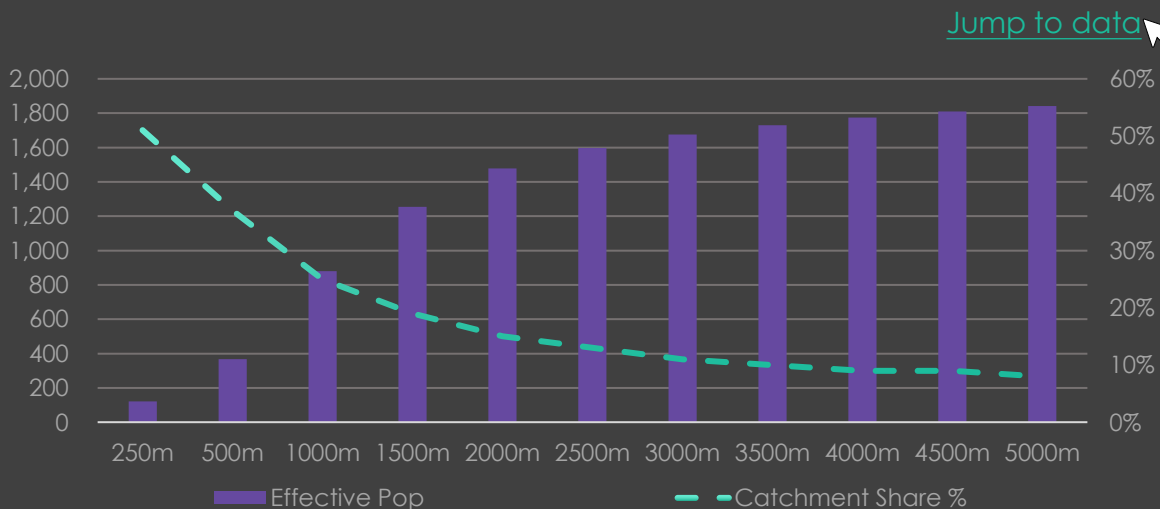


- Subway - 150
- McDonalds - 124
- Dominos - 99
- KFC - 88
- Other - 726

Number of Locations By Effective Population Cohort



Average Store Catchment Capture



Average 5km Catchment Metrics

	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Cairns	102	2,577	40,568	27.0	2,040	1,072	1,493
Darling Downs - Maranoa	45	2,930	9,497	7.0	1,495	424	6,198
Central Queensland	95	2,476	31,531	22.0	1,856	671	1,841
Gold Coast	387	1,722	90,811	57.0	1,694	448	319
Mackay Isaac Whitsunday	86	2,267	32,598	32.0	1,538	793	1,575
Outback	17	4,871	11,971	6.0	2,031	771	121,672
Sunshine Coast	143	2,935	48,689	22.0	2,524	1,155	788
Toowoomba	82	2,047	70,877	51.0	1,813	512	713
Townsville	135	1,786	55,914	45.0	1,538	732	2,347
Wide Bay	95	3,364	29,231	16.0	2,042	889	3,417



Greater Perth

Our latest research has identified a total of 1,050 fast food operators in Greater Perth, with low variance in the average market composition among the region's SA4 subregions. The effective (competition-adjusted) population per fast food catchment ranges from an average of 1,846 in the Perth - Inner region to 2,158 in Perth - North West, based on a 3.0km catchment range.

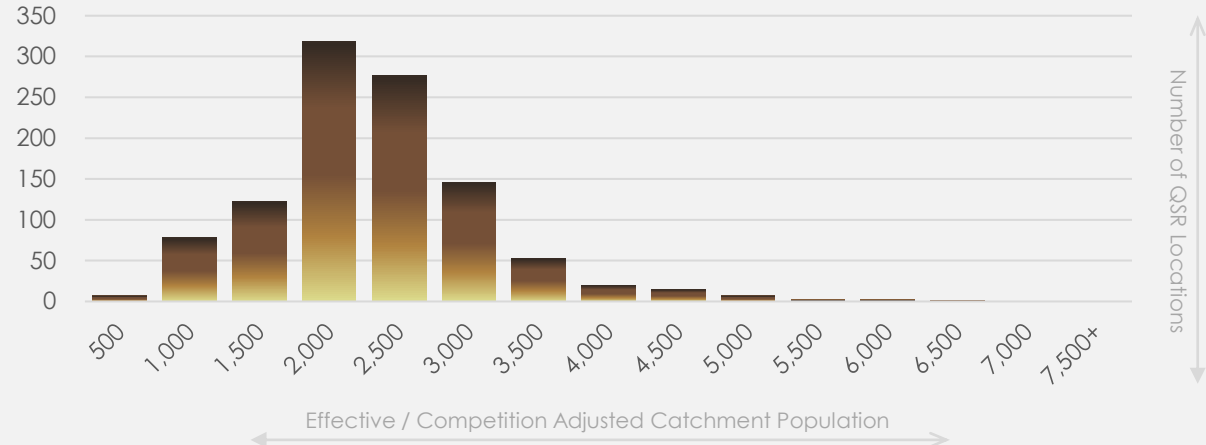
Compared to other metropolitan regions analysed nationally, the effective population capture within a typical QSR catchment in Greater Perth deviates to a lesser extent (~42.1%) from the average level recorded across all of the region's fast food locations. Most catchment effective population counts fall within the 1,200 to 3,000 range.

An important point for centre and leasing managers in the region, as noted at the beginning of the report, is that Greater Perth has the highest number of existing shopping centre assets with a higher-than-average effective population count per takeaway operation in the entire country.

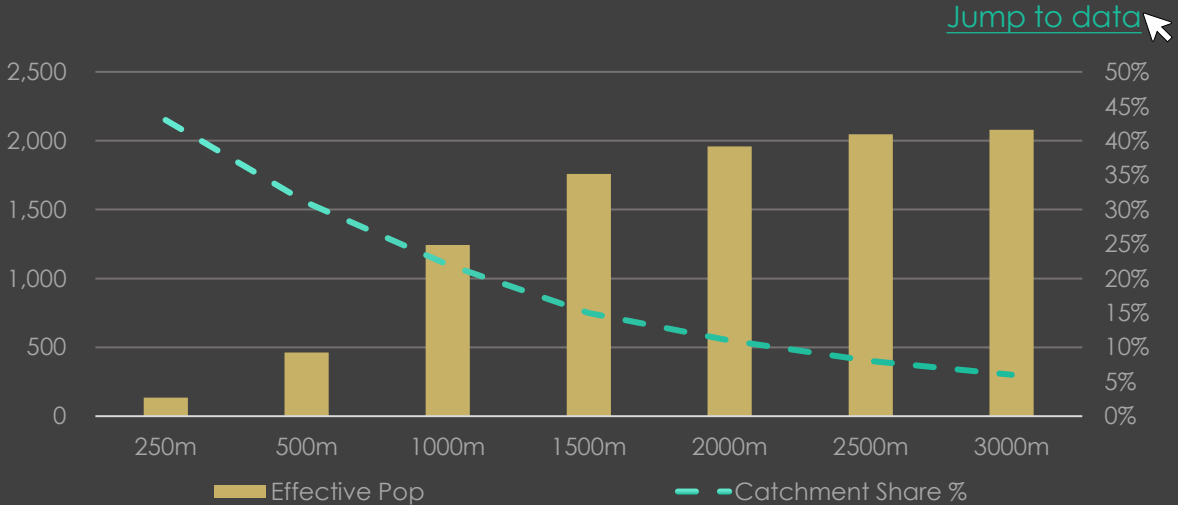


- Subway - 125
- McDonalds - 84
- Hungry Jacks - 64
- Dominos - 63
- Other - 714

Number of Locations By Effective Population Cohort



Average Store Catchment Capture



[Jump to data](#)

	Stores Assessed	Population Per Store	Average 3km Catchment Metrics				
			Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Mandurah	53	2,153	20,567	12.0	1,858	881	302
Inner	108	1,767	62,937	51.0	1,847	838	283
North East	140	2,093	36,201	23.0	1,979	984	459
North West	272	2,221	47,079	23.0	2,159	739	299
South East	258	2,161	43,003	20.0	2,128	742	354
South West	219	2,174	36,098	20.0	2,158	1,071	512



Regional Western Australia

Our recent research has identified a total of 169 fast food retailers in Regional Western Australia (WA). There is moderate variance in the average market composition among the region's SA4 subregions. The effective (competition-adjusted) population per QSR catchment, assessed over a 5.0 km range, averages from 1,749 in the Western Australia - Wheat Belt region to 2,279 in Western Australia - Outback (South). It is important to consider the region's remoteness when evaluating these results. Further investigation into factors such as typical customer travel trends is recommended to determine the effective catchment range for specific operations.

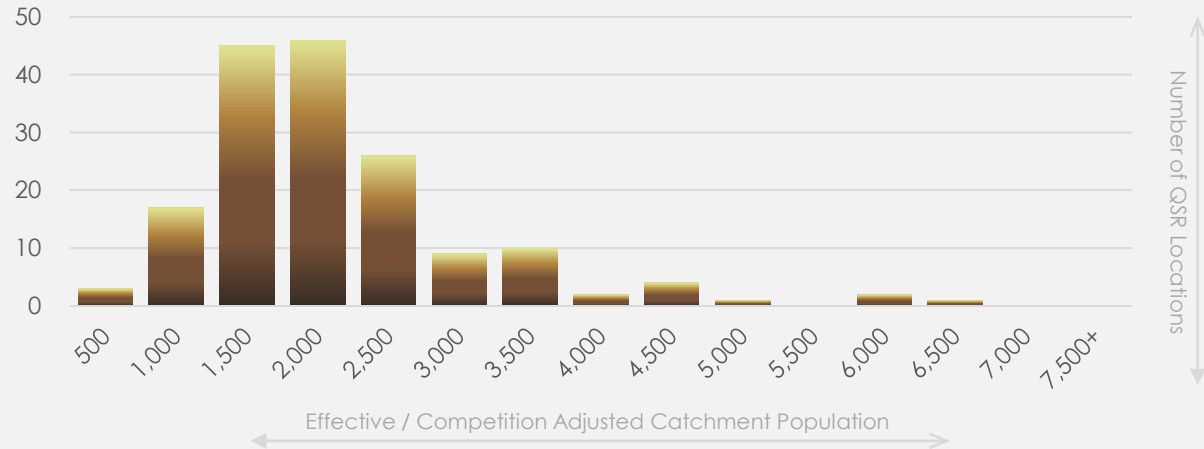
Compared to other non-metro regions analysed nationally, the effective population capture within a typical QSR catchment in Regional WA deviates to a lower extent (~36.4%) from the average recorded across all the region's QSR locations, with most catchment effective population counts falling within the 1,300 to 2,900 range.

As illustrated at the beginning of the report, four existing centres in the region have been identified as having potential for expansion, with an effective population count per major brand exceeding the regional average.

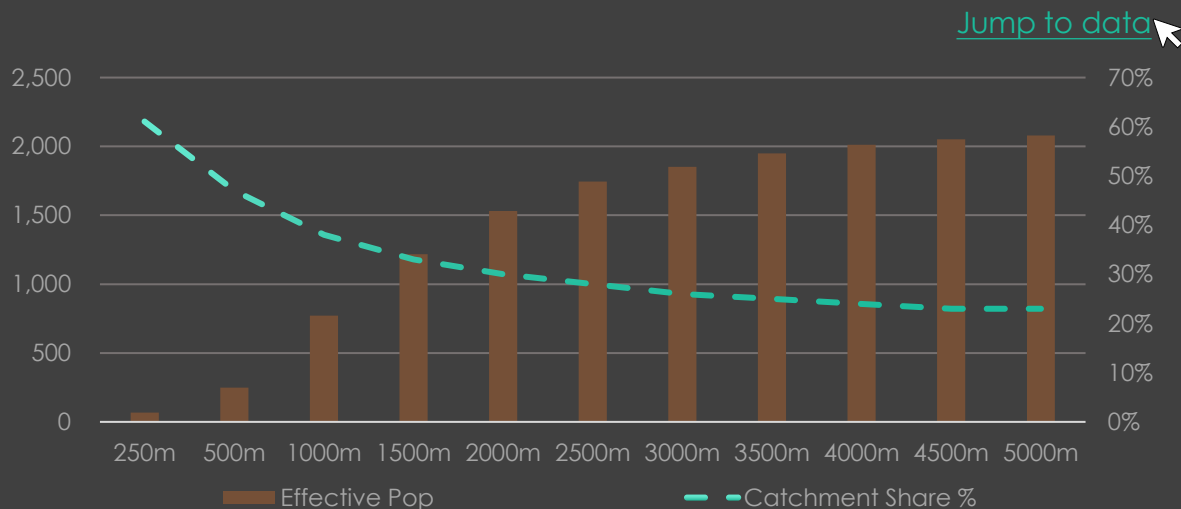


- Subway - 125
- McDonalds - 84
- Hungry Jacks - 64
- Dominos - 63
- Other - 714

Number of Locations By Effective Population Cohort



Average Store Catchment Capture



	Average 5km Catchment Metrics						
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Bunbury	71	2,794	22,882	13.0	2,057	827	3,494
Wheat Belt	29	4,925	12,440	7.0	1,750	795	23,781
Outback North	30	3,261	11,803	6.0	2,186	765	38,083
Outback South	39	3,199	20,781	11.0	2,280	587	36,264



Greater Adelaide

A total of 496 fast food retailers were identified in Greater Adelaide. There was low variance in the average market composition among the region's SA4 subregions. The effective (competition adjusted) population per QSR catchment ranged from an average of 2,421 in the Adelaide - Central and Hills region to 2,954 in Adelaide - South, based on a 3.0 km catchment range.

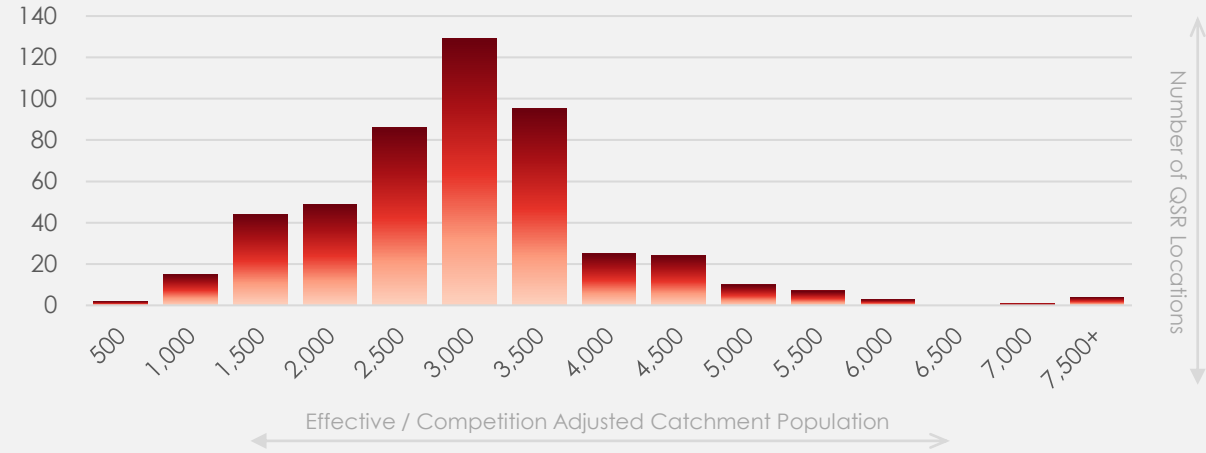
Compared to other metropolitan regions analysed nationally, the effective population capture within the typical fast food catchment in Greater Adelaide deviated to a lesser extent (~40.8%) from the average level recorded across all of the region's fast food locations. This resulted in the majority of catchment effective population counts falling within the 1,600 to 3,800 range.

As mentioned at the beginning of the report, 63 existing centres in the region have been identified as having potential for expansion, with an effective population count per major brand exceeding that of the region. Additionally, the typical resident in the region enjoys highly convenient access, with the nearest takeaway operation located 0.83 km from home.

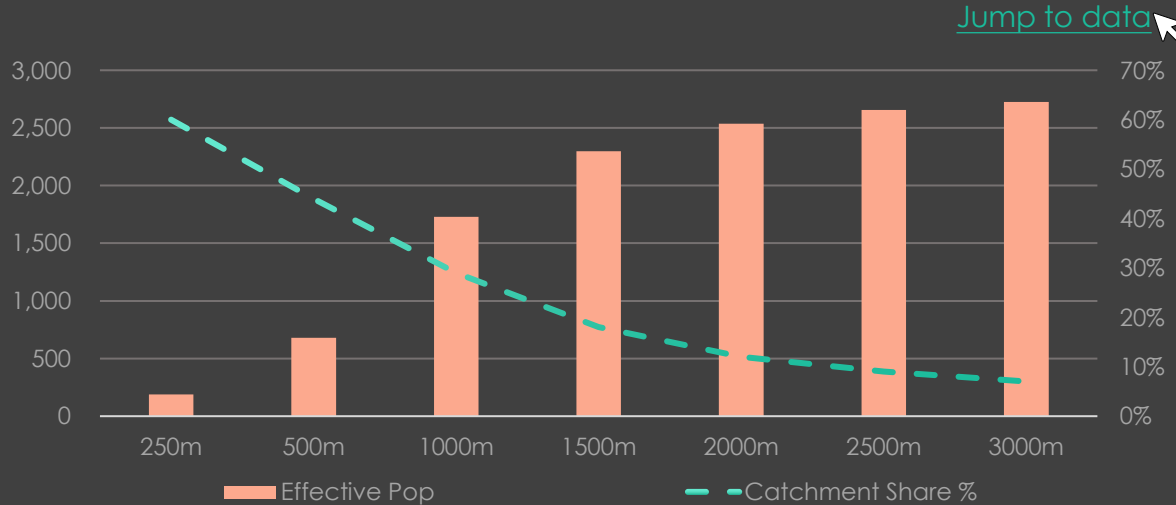


- Subway - 87
- McDonalds - 51
- Hungry Jacks - 43
- KFC - 42
- Other - 273

Number of Locations By Effective Population Cohort



Average Store Catchment Capture



	Stores Assessed	Population Per Store	Average 3km Catchment Metrics				
			Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Central and Hills	119	2,687	59,398	37.0	2,422	1,502	451
North	161	2,916	44,600	16.0	2,877	855	595
South	119	3,215	42,077	15.0	2,955	895	622
West	97	2,585	52,233	20.0	2,573	1,077	658



Regional South Australia

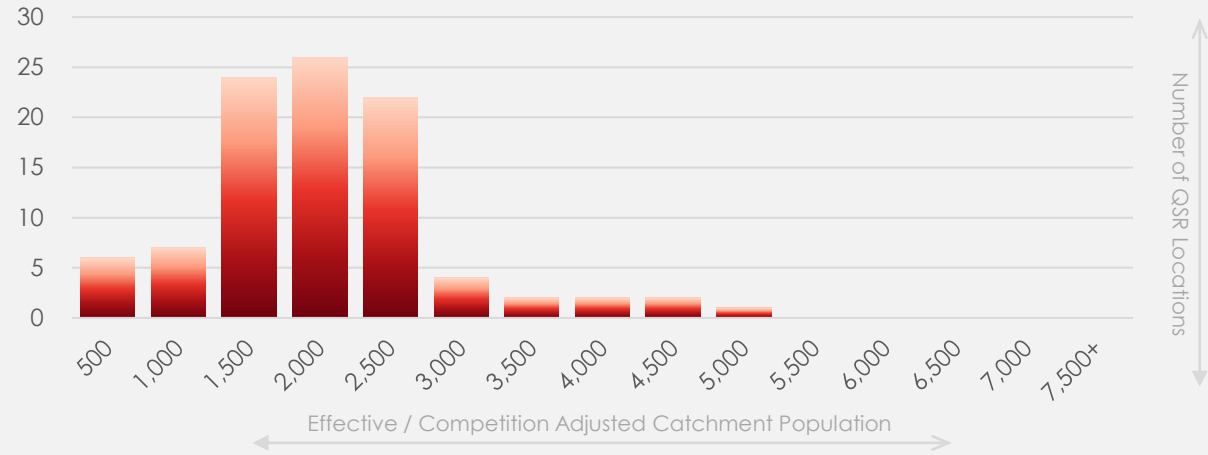
A total of 99 QSR operators were identified in Regional South Australia. Significant variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition-adjusted) population per QSR catchment ranging from an average of 1,667 in the Barossa - Yorke - Mid North region to 2,531 in South Australia - Outback, based on a 5.0km catchment range. The considerable distances between fast food locations highlight the importance of relative remoteness when assessing the region's results.

Compared to other non-metro regions analysed nationally, the effective population capture within the typical QSR catchment in Regional South Australia deviated at a fairly standard rate of 46.0% from the average level recorded across all of the region's fast food locations. Most catchment effective population counts fell within the 1,300 to 3,400 range.

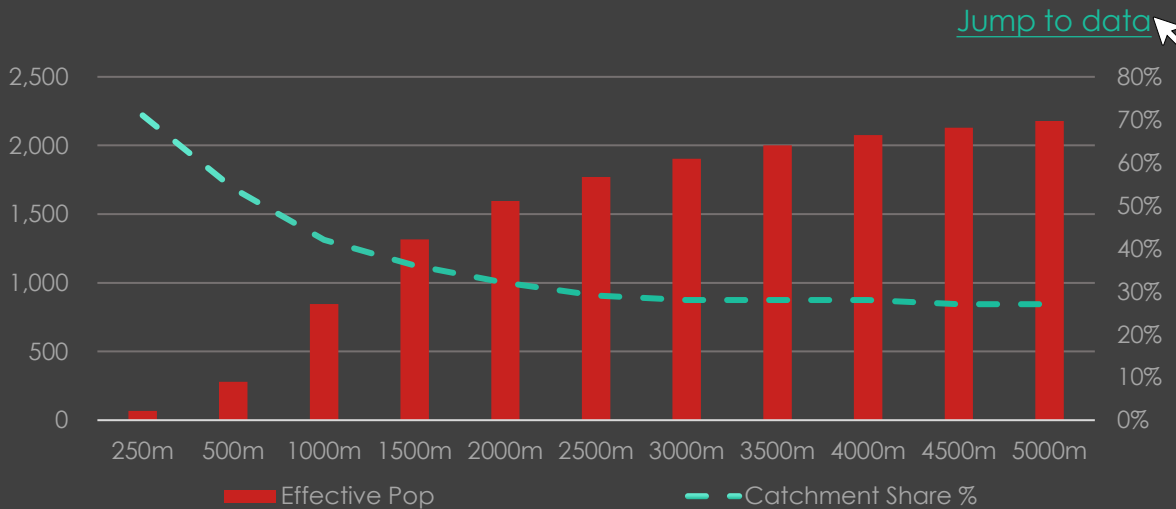


- Subway - 23
- Hungry Jacks - 13
- McDonalds - 12
- KFC - 10
- Other - 41

Number of Locations By Effective Population Cohort



Average Store Catchment Capture



	Average 5km Catchment Metrics						
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Barossa Yorke - Mid North	23	5,133	8,105	5.0	1,668	915	11,033
Outback	23	3,722	15,573	7.0	2,531	480	25,767
South East	53	3,775	16,431	9.0	2,245	1,581	7,076



Greater Hobart

Our latest research has identified a total of 92 fast food outlets in Greater Hobart, showing significant variance in average market composition. The effective (competition-adjusted) population per QSR catchment ranges from 733 to 5,202 within an adopted 3.0 km catchment range.

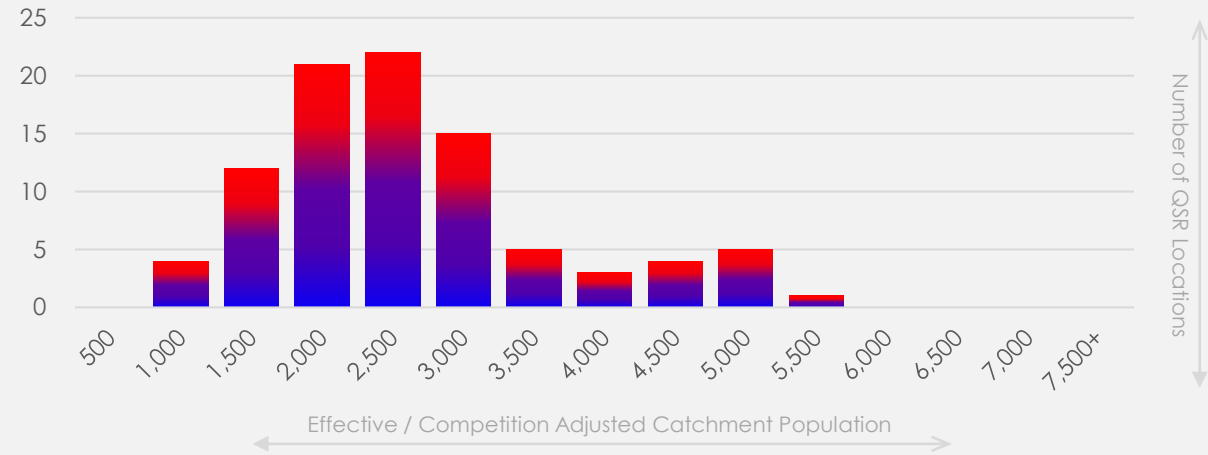
Compared to other metropolitan regions analysed nationally, the effective population capture within a typical QSR catchment in Greater Hobart deviates to a lesser extent (~43.1%) from the average level recorded across all its QSR locations. The majority of catchment effective population counts fall within the 1,400 to 3,200 range.

As indicated at the beginning of the report, two existing centres in the region have been identified as having potential for expansion, with an effective population count per major brand exceeding the regional average.



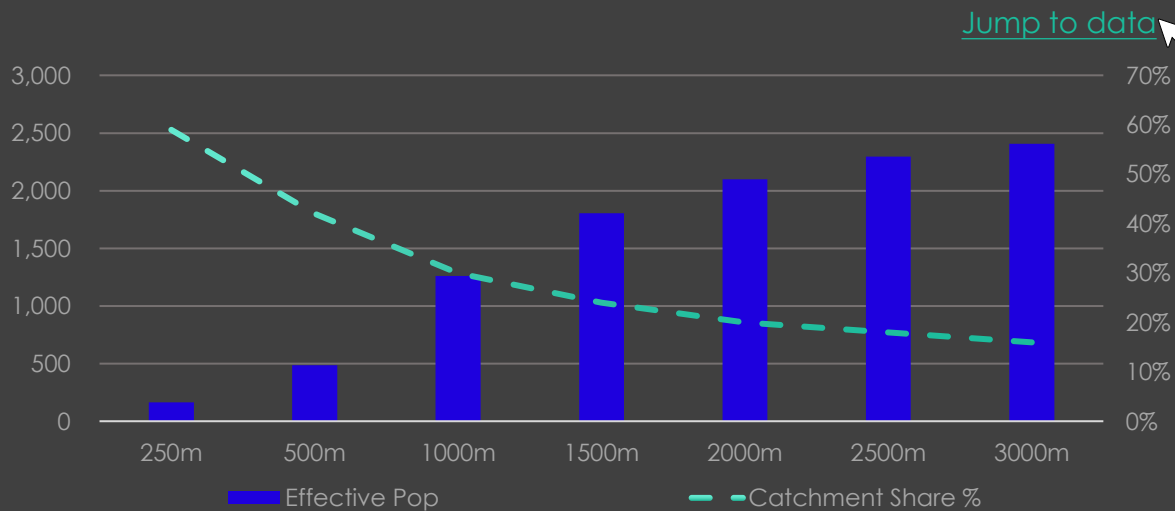
- Banjós Baker.. - 15
- Subway - 11
- McDonalds - 9
- Pie Face - 9
- Other - 48

Number of Locations By Effective Population Cohort



	Average 3km Catchment Metrics						
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Hobart	92	2,756	23,158	13.0	2,407	1,037	768

Average Store Catchment Capture



Regional Tasmania

A total of 83 fast food retailers were identified in Regional Tasmania. While there was moderate variance in the average market composition across the region's SA4 subregions, the effective (competition-adjusted) population per QSR (Quick Service Restaurant) catchment ranged from an average of 2,027 in the South East region to 2,618 in Launceston and North East, based on a 5.0km catchment range. The notable distances between QSR locations highlight the importance of relative remoteness when assessing the region's results.

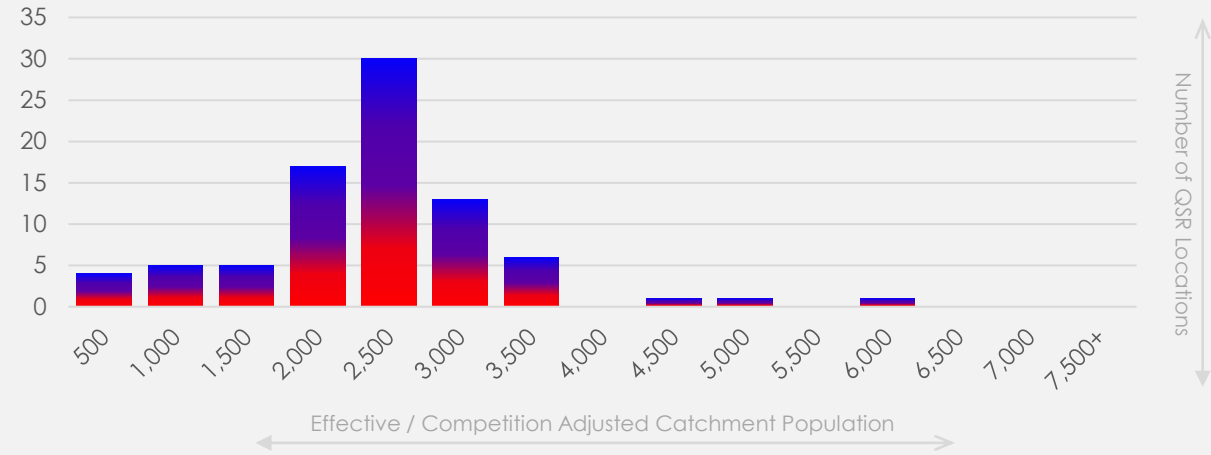
Compared to other non-metropolitan regions analysed nationally, the effective population capture within a typical fast food catchment in Regional Tasmania deviated to a lesser extent (~31.8%) from the average level recorded across all of the region's fast food locations. This indicates that the majority of catchment effective population counts fall within the 1,800 to 3,300 range.

As noted in the initial section, two existing centres in the region have potential for expansion, with an effective population count per major brand exceeding the regional average.



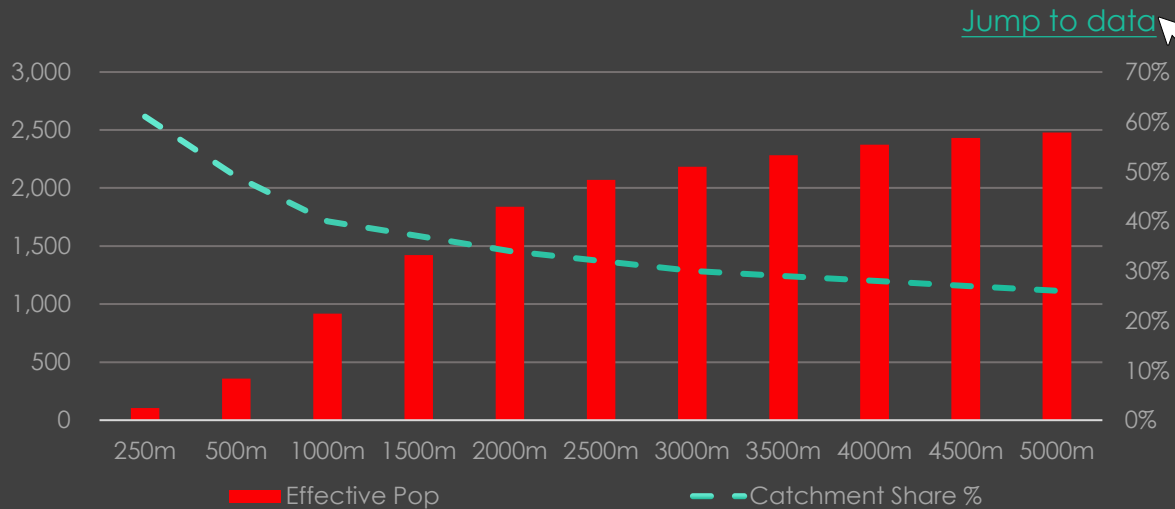
- Banjos Baker.. - 13
- Pie Face - 13
- Subway - 13
- KFC - 9
- Other - 35

Number of Locations By Effective Population Cohort



	Average 5km Catchment Metrics						
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Launceston and North East	46	3,397	37,602	16.0	2,619	892	6,420
South East	4	10,915	3,314	2.0	2,028	719	22,702
West and North West	33	3,637	17,508	8.0	2,340	790	2,158

Average Store Catchment Capture



Greater Darwin

A total of 71 fast food outlets were identified in Greater Darwin, with significant variance observed in the average market composition among them. The effective (competition-adjusted) population per fast food catchment ranged from 127 to 4,945 within an adopted 3.0 km catchment area.

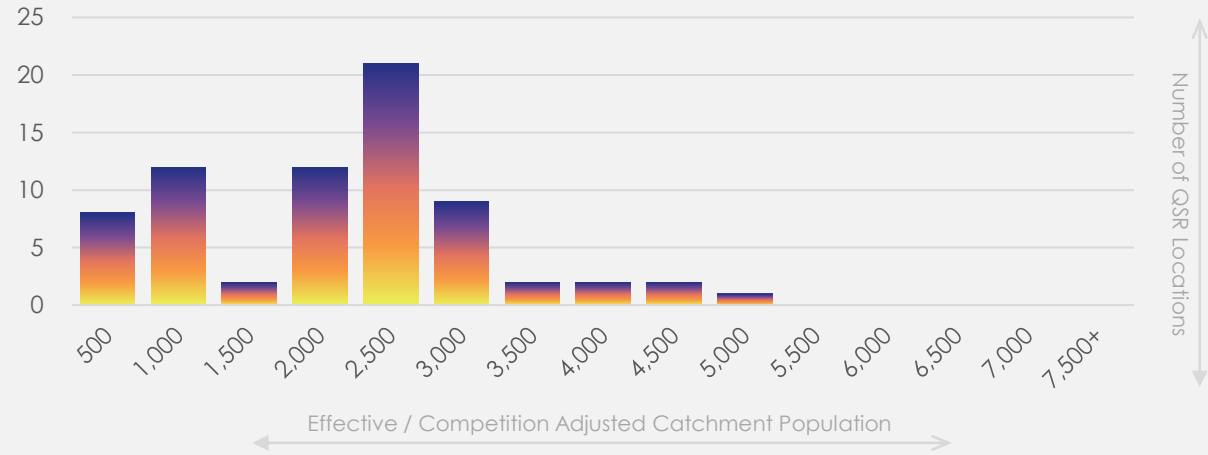
Compared to other metropolitan regions analysed nationally, the effective population capture within a typical fast food catchment in Greater Darwin deviated more significantly (~54.7%) from the average level recorded across all its fast food locations. Most catchment effective population counts fell within the 900 to 3,000 range.

As illustrated in the initial section, six existing centres in the region have been found to possess potential for expansion, with an effective population count per major brand exceeding that of the region.



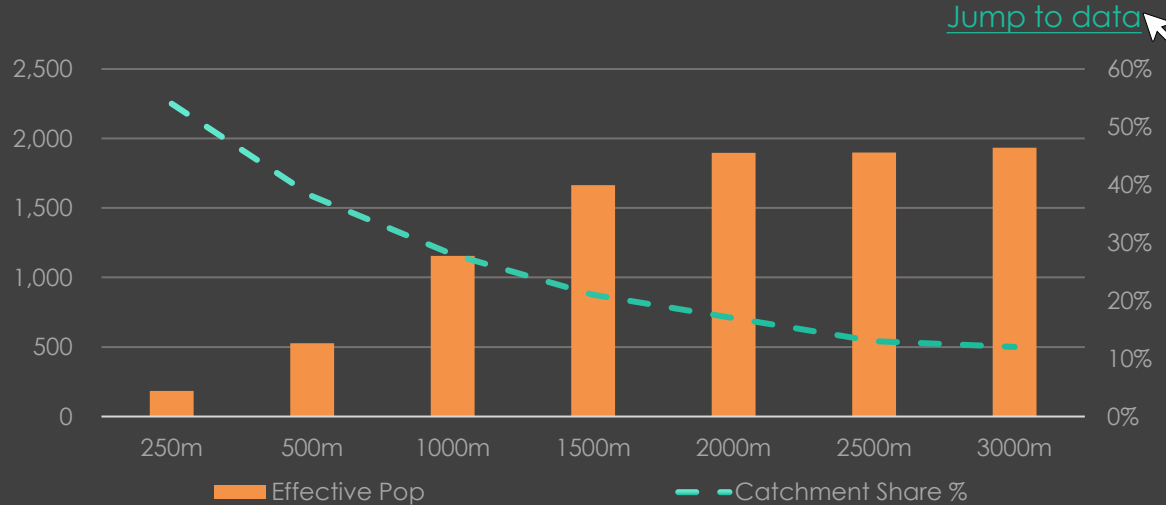
- Subway - 9
- Pie Face - 8
- McDonalds - 7
- Dominos - 6
- Other - 41

Number of Locations By Effective Population Cohort



	Average 3km Catchment Metrics						
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Darwin	71	2,110	22,877	14.0	1,933	1,057	961

Average Store Catchment Capture



Regional Northern Territory

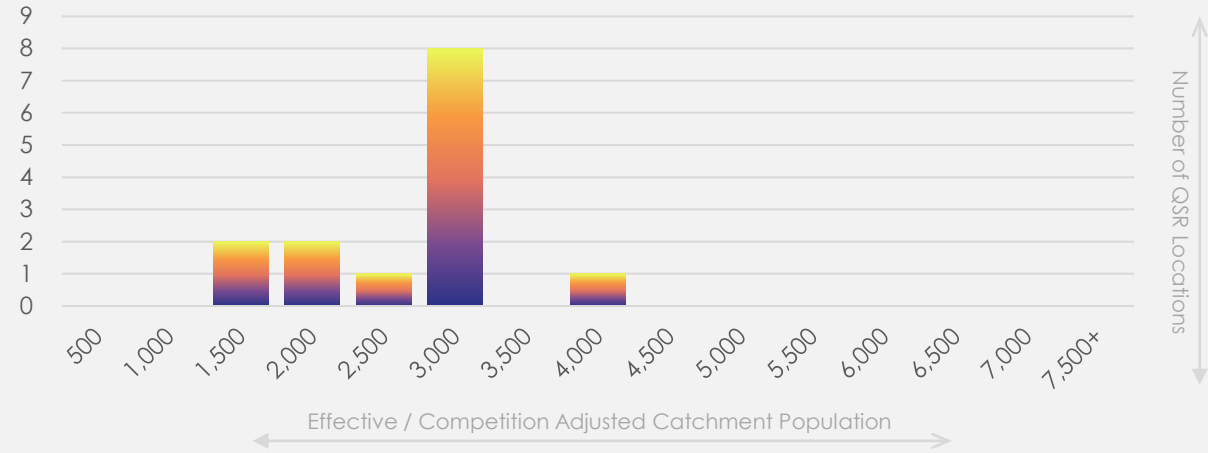
A total of 17 QSRs (Quick Service Restaurants) were identified in Regional NT, with significant variance observed in the average market composition among them. The effective (competition-adjusted) population per QSR catchment ranged from 0 to 3,556 within an adopted 5.0km catchment area. The notable distances between fast food locations highlight the region's relative remoteness and the small sample size, both of which are important factors to consider when assessing the region's results.

Compared to other non-metro regions analysed nationally, the effective population capture within the typical QSR catchment in Regional NT deviated to a greater extent (~62.7%) from the average level recorded across all its QSR locations. Most catchment effective population counts fell within the 1,900 to 3,500 range.



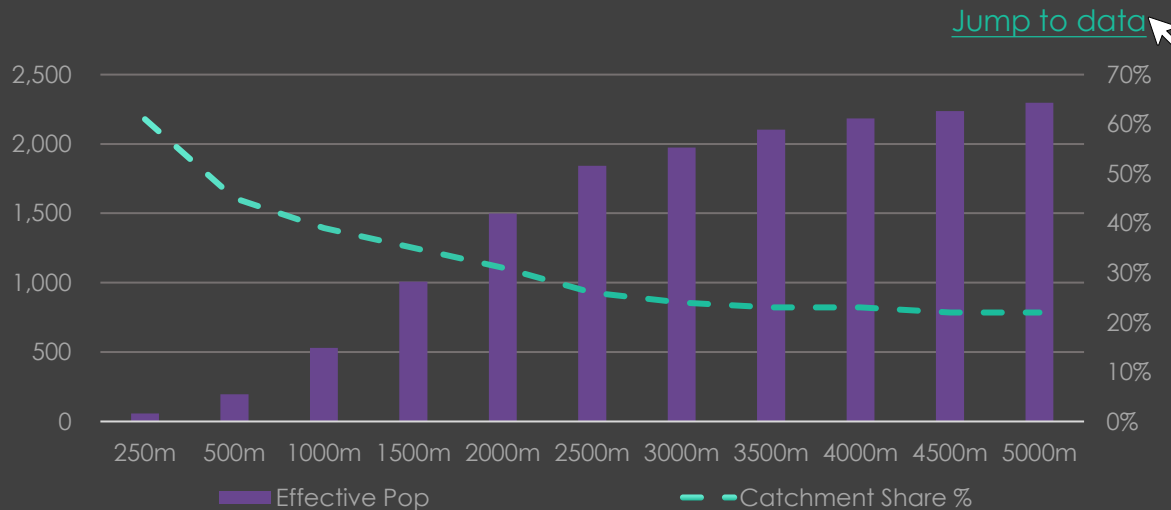
- McDonalds - 2
- Pie Face - 2
- Red Rooster - 2
- Subway - 2
- Other - 9

Number of Locations By Effective Population Cohort



	Average 5km Catchment Metrics						
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Outback	17	7,759	15,534	6.0	2,296	1,221	57,400

Average Store Catchment Capture



Australian Capital Territory

Our latest research has identified a total of 197 fast food outlets in the Australian Capital Territory, showing significant variance in the average market composition among them. The effective (competition-adjusted) population per QSR catchment ranges from 29 to 10,776, based on a 3.0km catchment area.

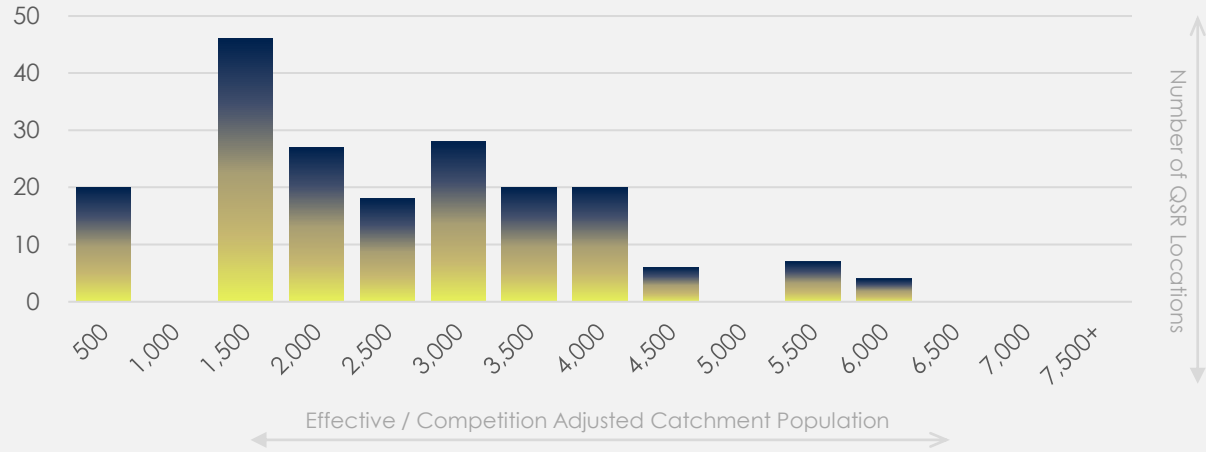
Compared to other metropolitan regions analysed nationally, the effective population capture within the typical fast food catchment in the Australian Capital Territory deviates more significantly (~61.6%) from the average level recorded across all its fast food locations. This results in the majority of catchment effective population counts falling within the 1,100 to 3,800 range.

As noted in the initial section, four existing centres in the region have been identified as having potential for expansion, with an effective population count per major brand exceeding that of the region.



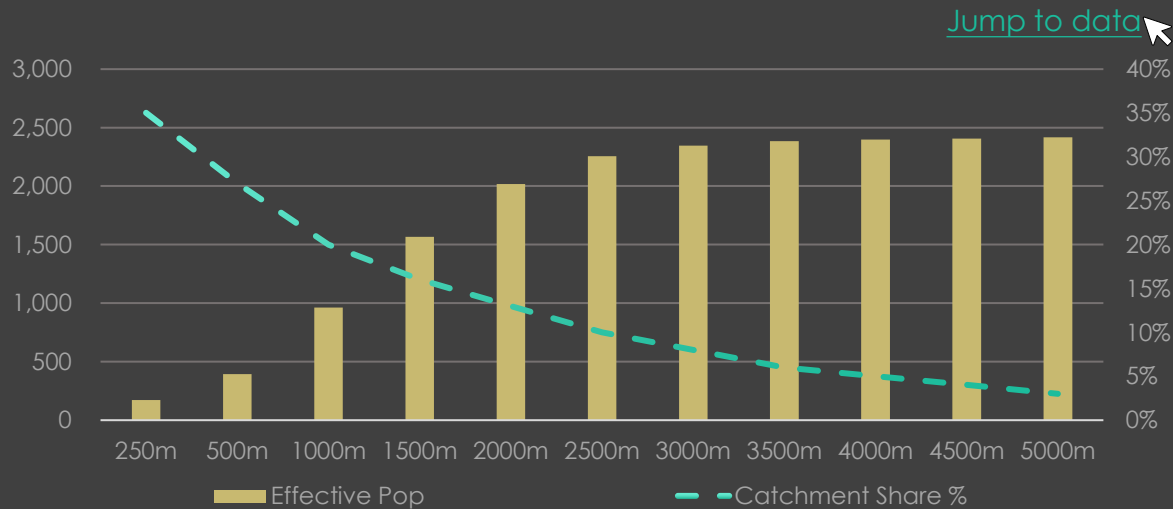
- Subway - 27
- McDonalds - 21
- Dominos - 15
- Zambrero - 14
- Other - 120

Number of Locations By Effective Population Cohort



	Stores Assessed	Population Per Store	Average 3km Catchment Metrics				
			Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Australian Capital Territory	197	2,328	35,244	18.0	2,345	1,445	364

Average Store Catchment Capture



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Brand	Count	Nearest Peer *	Nearest Network *	Nearest to Residents **
Subway	1,231	0.09	2.22	1.84
McDonalds	1,042	0.1	2.54	2.01
KFC	788	0.07	2.99	2.35
Dominos	728	0.11	3.62	2.21
Bakers Delight	519	0.06	2.91	3.14
Hungry Jacks	469	0.08	3.92	3.28
Boost Juice	378	0.04	3.19	3.83
Red Rooster	333	0.09	4.09	4.71
Pie Face	294	0.74	5.93	7.51
Pizza Hut	269	0.1	5.25	4.49
Zambrero	254	0.06	4.36	7.09
The Coffee Club	233	0.05	4.33	6.52
Donut King	214	0.02	5.69	6.17
Oporto	198	0.04	3.17	8.89
Guzman Y Gomez	192	0.06	4.86	6.94
Sushi Hub	172	0.03	3.75	7.37
Grilld	165	0.04	3.88	7.57
Muffin Break	161	0.03	5.14	7.47
Soul Origin	150	0.04	5.02	7.37
Sushi Sushi	149	0.09	3.4	20.18

Here we have sorted the top operators by number of stores in Australia showing total count, distance to other brand locations, network locations, and the distance of the typical resident in the country to the nearest location of each brand (note: this may seem particularly high for certain brands if operating in a limited number of states). Please click the above link for further detail, and for interested users, please reach out if seeking further detail on aggregated supply and demand relativities per brand.

* Median ** Distance of median populated mesh block in Australia to nearest store



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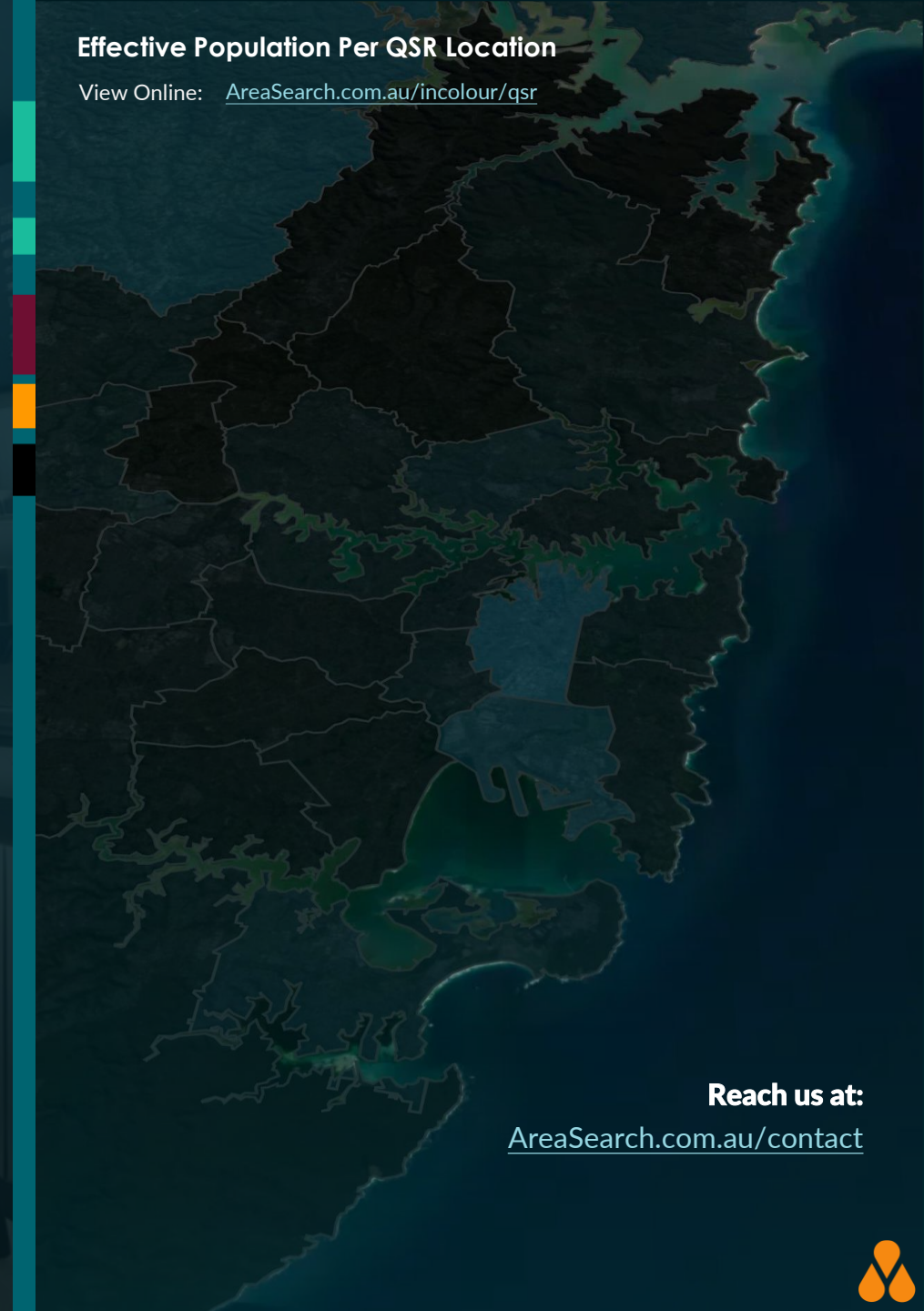
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Effective Population Per QSR Location

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