

## Burger and Chicken Restaurants - UK - August 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Parents are vital to burger and chicken restaurants as the population of 0-14 year-olds grows. Brands are focusing on non-core items to boost snacking occasions, while diners want to see less sugar, fat and salt. Yet the sector is experiencing the halo effect, with diners interested in gourmet chicken. Meanwhile, daily deals, loyalty cards and late-night openings can nudge more diners to visit.”  
**– Trish Caddy, Foodservice Analyst**

This report looks at the following areas:

- **It's vital to engage parents of under-16s**
- **There's scope to cater to older diners**
- **Non-core items are important in their own way**

Much of the growth in the burger and chicken restaurants market is due to brands pushing to build consumer trust, new entrants' expansion plans, efforts to innovate in non-core products to boost snacking occasions and a focus on high-welfare ingredients and healthier cooking methods. This is despite UK restaurant groups facing headwinds to maintain trading levels as their margins are squeezed by increasing overheads.

The forecast population growth of 0-14 year-olds between 2016 and 2021 bodes well, given that parents of under-16s are most likely to visit a burger or chicken outlet/restaurant. Daily deals, loyalty cards and late-night openings can also nudge more diners to visit a burger or chicken restaurant. Meanwhile, young men enjoy using self-service ordering kiosks, whereas women are most likely to enjoy salad and dessert bars, if these are available in burger or chicken restaurants.

Diners want to see less sugar, fat and salt in burger and chicken meals, given that health concerns have made them limit the amount of fast food they eat. Meanwhile, options to substitute healthier ingredients for less healthy ones as well as calorie content on menus can help diners make healthier choices when eating in burger or chicken restaurants.

**BUY THIS  
REPORT NOW**

**VISIT:**  
store.mintel.com

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
reports@mintel.com

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Burger and Chicken Restaurants - UK - August 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know  
Products covered in this Report

### Executive Summary

The market  
Costs rise but opportunities knock  
Burger  
Figure 1: UK burger restaurants market, value sales and forecast, 2012-22  
Chicken  
Figure 2: UK chicken restaurants market, value sales and forecast, 2012-22  
Companies and brands  
McDonald's remains the leading player while KFC experiences the halo effect  
Home delivery takes off in the UK  
Social media engages young diners  
The consumer  
People visit burger venues more than chicken venues  
Figure 3: Fast food outlet usage, by type, June 2017  
Eating out is a treat for parents and young diners  
Figure 4: Frequency of eating in or getting a takeaway from fast food outlets, June 2017  
Understanding diners' motivations to visit  
Figure 5: Motivations to visit burger and chicken outlets/restaurants, June 2017  
Healthy initiatives diners would most like to see  
Figure 6: Healthy initiatives diners would most like to see, June 2017  
Behaviours towards eating burger and chicken out of home  
Figure 7: Behaviours towards eating burger and chicken out of home, June 2017  
What we think

### Issues and Insights

It's vital to engage parents of under-16s  
The facts  
The implications  
There's scope to cater to older diners  
The facts  
The implications  
Non-core items are important in their own way  
The facts  
The implications

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Burger and Chicken Restaurants - UK - August 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## The Market – What You Need to Know

Costs rise...

...but opportunities knock

Burger and chicken market is in growth

## Segment Performance, Market Size and Forecast

Burger and chicken restaurants are in growth

Figure 8: Value sales for burger and chicken restaurants market, 2012-22

Demographic changes could temper market growth

Figure 9: UK burger and chicken restaurants market, value sales and forecast, 2012-22

Burger segment continues to dominate the market despite headwinds

Figure 10: Values sales of burger restaurants segment, 2012-22

Figure 11: UK burger restaurants market, value sales and forecast, 2012-22

Chicken segment experiencing halo effect

Figure 12: Value sales of chicken restaurants segment, 2012-22

Figure 13: UK chicken restaurants market, value sales and forecast, 2011-21

Forecast methodology

## Market Drivers

Rising costs on the cards for food operators in 2017

Business rates

Rising inflation and the weakened pound

National Living Wage and National Minimum Wage

Apprenticeship levy comes into force in April 2017

Consumer crutch holding up eating out sector

Driven by those who are 'getting by'...

Figure 14: Trends in how respondents would describe their financial situation, 2009-17

...and diners who are spending up to £20 on a meal

Figure 15: Leisure activity spend on going to a fast food restaurant for a meal, January 2016-April 2017

Core user group set for stunted growth

Figure 16: Trends in the age structure of the UK population, 2011-16 and 2016-21

Understanding Britons' attitudes towards food

Eating for health

Flexitarianism

Foodism

Figure 17: Trends in selected attitudes towards food, April 2016-May 2017

Smartphone ownership is peaking

Hospitality recruitment at its most difficult...

...but stability is on the horizon

Figure 18: Trends in healthy food factors, April 2016-May 2017

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Burger and Chicken Restaurants - UK - August 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

FSA issues new regulations on cooking burgers  
Red Tractor toughens farm standards

## Key Players – What You Need to Know

McDonald's leads by store and usage numbers  
KFC experiencing the halo effect  
Home delivery takes off in the UK  
Social media engages young diners

## Companies and Brands

Figure 19: Selected leading burger and chicken restaurant chains, by outlet numbers, 2013-17

### McDonald's

Figure 20: Key financial data for McDonald's Restaurants Ltd, 2014-15

### Kentucky Fried Chicken (KFC)

Figure 21: Key financial data for Kentucky Fried Chicken (GB) Ltd, 2014-15

### Nando's

Figure 22: Key financial data for Nando's Chickenland Limited, 2015-16

### Burger King

### Gourmet Burger Kitchen (GBK)

Figure 23: Key financial data for Gourmet Burger Kitchen Limited, 2015-16

### Byron Hamburgers

Figure 24: Key financial data for Byron Hamburgers Limited, 2015-16

### Five Guys

### Honest Burgers

Figure 25: Key financial data for Honest Burgers Limited, 2014-15

### Meat Liquor

Figure 26: Selected gourmet burger and chicken outlets, by outlet numbers, 2015-17

### Ones to watch

### Smashburger

### Shake Shack

### Absurd Bird

### Chicken Society

### Patty & Bun

### 7Bone Burger Co

### BIRD

### Wingstop

## Launch Activity and Innovation

Home delivery and takeaway gains traction  
Delivery-only format vs expensive restaurant sites  
Using free food to drive footfall

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Burger and Chicken Restaurants - UK - August 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Smaller formats scale up  
 Chicken goes big on new flavours  
 Korean  
 Nashville  
 Jamaican  
 Boneless chicken adds zing  
 Dipping sauce trend heats up  
 Initiatives to help diners make healthy choices  
 Quality of ingredients and equipment  
 Vegetarian concepts gain traction  
 Lighter choices  
 Non-core items become important in their own right

## Advertising and Marketing Activity

Using social media to engage young diners  
 Nando's continues to drive website traffic  
 Gourmet Burger Kitchen (GBK) uses visuals to engage  
 Figure 27: Selected burger and chicken brands' social media presence, 2016-17  
 McDonald's core objective of growing consumer trust  
 The end of Olympic sponsorship  
 Aligns with UEFA Women's Euro in 2017  
 Continues to target music-lovers in the UK  
 Pushes McDelivery services globally  
 Using child bereavement to promote Filet-O-Fish backfires  
 McCafé pokes fun at hipster coffee in 2017  
 Chicken Selects takes centre stage at Christmas  
 Launches Night Tube map app for London diners  
 KFC remains focused on building trust  
 Building trust through behind-the-scenes initiative  
 KFC continues to push lunchtime Ricebox range  
 The Whole Chicken gets mixed reviews  
 Burger King focuses on creative awards  
 Attempts to have fun with Google Home backfires  
 Gourmet Burger Kitchen (GBK) benefits from US presidential elections  
 Figure 28: Recorded above-the-line, online display and direct mail total advertising expenditure, by selected burger and chicken operators, 2012-17  
 Nielsen Ad Intel coverage

## Brand Research

Brand map  
 Figure 29: Attitudes towards and usage of selected brands, June 2017  
 Key brand metrics

**BUY THIS  
 REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
 APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Burger and Chicken Restaurants - UK - August 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 30: Key metrics for selected brands, June 2017

Brand attitudes: Burger King and KFC are seen as widely available

Figure 31: Attitudes, by brand, June 2017

Brand personality: McDonald's and Nando's seen as more fun and vibrant

Figure 32: Brand personality – Macro image, June 2017

TGI Fridays is cool and exciting

Figure 33: Brand personality – Micro image, June 2017

Brand analysis

Nando's attracts more affluent diners

Figure 34: User profile of Nando's, June 2017

KFC is surging forward

Figure 35: User profile of KFC, June 2017

TGI Fridays has low brand commitment

Figure 36: User profile of TGI Fridays, June 2017

McDonald's is a favourite brand

Figure 37: User profile of McDonald's, June 2017

Burger King is falling behind

Figure 38: User profile of Burger King, June 2017

### The Consumer – What You Need to Know

Under-35s and parents are frequent diners

Understanding burger and chicken diners

What are diners' motivations to visit?

How to help diners make healthy choices?

Understanding burger and chicken diners' behaviours

### Usage Habits

Students and parents eat burger or chicken out-of-home

Britons eat at burger venues more than chicken venues

Demographics of burger diners

Demographics of chicken diners

Figure 39: Any usage, June 2017

Usage continues to thrive in 2017 despite headwinds

Figure 40: Fast food outlet usage, by type, June 2017

Usage declines with age

Figure 41: Fast food outlet usage, by age groups, June 2017

### Frequency of Use

McDonald's and Burger King's frequent users

KFC and Nando's frequent users

Figure 42: Frequency of eating in or getting a takeaway from fast food outlets, June 2017

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Burger and Chicken Restaurants - UK - August 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Understanding Diners' Motivations to Visit

Most diners are interested in daily deals

Millennials most likely to click and collect

Younger diners drawn to late-night opening hours

Young men enjoy using self-service ordering kiosks

Figure 43: Motivations to visit burger and chicken outlets/restaurants, June 2017

Drinks menus appeal to rotisserie chicken diners

35-44-year-olds most likely to use loyalty cards

Women most likely to enjoy salad and dessert bars

Figure 44: Any motivations to visit burger and chicken outlets/restaurants, by any burger or chicken fast food outlets/restaurants usage, June 2017

### Healthy Initiatives Diners Would Most Like to See

Health factors most important to Britons

Figure 45: Trends in healthy food factors, April 2016-May 2017

Behind-the-scenes visits can help build trust among core customers

Over-65s want to see less sugar, fat and salt in meals

Women would like calorie content to be more visible

Figure 46: Healthy initiatives diners would most like to see, June 2017

Healthier meal alternatives become commonplace

Men want to see a wider range of portion sizes

Diners expect healthier cooking methods

Parents of young children seek healthy snacks

Figure 47: Any healthy initiatives diners would most like to see, by any burger or chicken fast food outlets/restaurants usage, June 2017

### Out-of-home Eating Behaviours

Understanding Britons' behaviours towards food

Figure 48: Trends in selected food behaviours which consumers do all of the time, April 2016-May 2017

Customisation is important across all types of outlets/restaurants

Health concerns may convert fast food diners into gourmet diners

Consumers who have ordered home delivery from a burger/chicken restaurant

Understanding chicken diners

16-24-year-olds and over-55s prefer boneless chicken

Crispy chicken proves more popular than grilled chicken

Figure 49: Behaviours towards eating burger and chicken out of home, June 2017

Gourmet chicken becomes commonplace

There is scope to promote gift cards

Chicken diners enjoy dipping sauces

Gourmet burger diners most adventurous

Burger diners are lukewarm about paying more for gourmet burgers

Diners drawn to other chicken outlets for lunchtime meals

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Burger and Chicken Restaurants - UK - August 2017

Report Price: £1995.00 | \$2583.33 | €2370.86

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 50: Any behaviours towards eating burger and chicken out of home, by any burger or chicken fast food outlets/restaurants usage, June 2017

### Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

### Appendix – Market Size and Forecast

Forecast methodology

Figure 51: UK burger and chicken restaurants market, value sales, best- and worst-case forecast, 2017-21

Figure 52: UK burger restaurants segment, value sales, best- and worst-case forecast, 2017-21

Figure 53: UK chicken restaurants segment, value sales, best- and worst-case forecast, 2017-21

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)