

Report Price: £2466.89 | \$3995.00 | €3133.71

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



As Americans continue to gravitate toward chicken and sandwich concepts, operators are answering their desire for premium and better-for-you products that are natural and highly customized.

## This report looks at the following areas:

- Consumers are eschewing QSRs and moving to fast casuals
- · Healthy eating is a growing concern for many Americans
- · At home dining is taking a greater share of consumers' stomachs

More restaurants are focusing on making a better burger and chicken sandwich through high quality meats, cheeses, and toppings. International flavors have also made an appearance on these sandwiches as the trend of consumers trying new ethnic ingredients continues to grow.

# BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+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



Report Price: £2466.89 | \$3995.00 | €3133.71

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

Definition

## **Executive Summary**

#### The issues

## Consumers are eschewing QSRs and moving to fast casuals

Figure 1: LSR burger and chicken concept usage, by type, 2014 vs. 2015, May 2015

#### Healthy eating is a growing concern for many Americans

Figure 2: LSR burger and chicken concepts: consumers ordering healthy items "more" compared to last year, May 2015

## At home dining is taking a greater share of consumers' stomachs

Figure 3: LSR burger and chicken concepts: Consumers preparing food at home "more" compared to last year, May 2015

#### The opportunities

## Consumers are willing to pay more for premium ingredients

Figure 4: LSR burger and chicken concepts: customers willing to pay more for premium toppings by segment visitation, May 2015

## Burger and chicken LSRs can make consumers feel good about their food

Figure 5: LSR burger and chicken concepts: most important factors, May2015

## Highly customized options give something to everyone

Figure 6: LSR burger and chicken concepts: most important factors, "customization", May 2015

## What it means

## The Market - What you need to know

Fast casuals will grow the limited service market

Consumers are turning to food from the home

Raising beef prices can drive restaurant traffic

## Market Size and Forecast

## Historic and projected sales performance

Figure 7: Total US sales and fan chart forecast of limited service restaurants at current prices, 2009-19

Figure 8: Total U.S. sales and forecast of limited service restaurants, at current prices, 2009-19

Figure 9: Total U.S. market share of restaurants and other eating places, by segment, at current prices, 2014

## Market Factors

## Food at retail is the greatest challenge for burger and chicken sandwich LSR's

Figure 10: LSR burger and chicken concepts: preparing food at home more, May 2015

## Consumer confidence is still in flux

Figure 11: consumer confidence index, January 2007-May 2015

## The price of both beef and poultry continues to rise

Key Players - What You Need to Know



VISIT: store.mintel.com

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

EMAIL: reports@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

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

Premium offerings define the new burger/chicken sandwich restaurant

American staples go global

Have it your way-customization is key

What's Working?

Spicy is still the "hot" trend

Figure 12: attitudes/ opinions about foods cooked with lots of spices; agree, May 2015

High-quality concepts propel burgers and chicken sandwiches

Figure 13: LSR burger and chicken concepts: willing to pay more for premium toppings, May 2015

**Burger Winners** 

**Burger Strugglers** 

Chicken Winners

Chicken Strugglers

Menu Insights: Burgers are growing on fine dining menus

Figure 14: incidence of burgers on menus, Q1 2012-2015

Any way you want it customization

What's Next?

Consumers demand healthy items when dining out

Smoky burgers and chicken

International flair

The Consumer - What You Need to Know

Hispanics are contributing to the growth of fast casuals

There is no "one size fits all" for providing values and deals

Older Millennials are the trend setters

The importance of burger and chicken sandwich factors varies by gender

**QSR** and Fast Casual Visitation

QSR's are still the most visited LSR, but fast casuals are poised to grow

Figure 15: LSR burger and chicken concepts: segment visitation in the past month, May 2015

Efficacy of Deals and Discounts Depends on Age

Millennials respond to social media, Boomers to print

Figure 16: LSR burger and chicken concepts: deals, discounts, and programs consumers most like to use, May 2015

What Reaches Men vs Women

Women want health while men go for trends

Figure 17: LSR burger and chicken concepts: statement agreement, "any agree", May 2015

Healthy Eating is in the Mind of the Consumer

Parents are particularly interested in heathy offerings

Figure 18: LSR burger and chicken concepts: consumers ordering "more" healthy items compared to last year, May 2015

Perception of health is subjective

BUY THIS REPORT NOW VISIT: store.mintel.com

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

EMAIL: reports@mintel.con



Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 19: McDonald's and Shake Shack nutrition comparison, July 2015

Portion Control Offers Bite-Sized Premium Indulgences

Both men and women are interested in smaller portion sizes

Figure 20: LSR burger and chicken concepts: respondents interested in smaller portions of foods "any agree", May 2015

Marketing to Older Millennials

Older Millennials are the trendsetters

Figure 21: LSR burger and chicken concepts: most important considerations, May 2014

**Ethics and Millennials** 

Millennials desire "feel good" attributes

Figure 22: LSR burger and chicken concepts: most important factors May 2015

Ethical Claims: Menu Insights and restaurant examples

Globalization of Burgers and Chicken Sandwiches

Older Millennials want innovative burgers

Figure 23: LSR burger and chicken concepts: respondents interested in international varieties of familiar foods "any agree", May 2015

Examples of international burgers and chicken

Customization is Something All Demographics Seek

Reach all generations through customized options

Figure 24: LSR burger and chicken concepts: statement agreement "any agree", May 2015

Reaching the High Income Consumer

More affluent consumers order healthier menu items

Figure 25: LSR burger and chicken concept usage, May 2015

Figure 26: LSR burger and chicken concepts: consumers ordering "more" healthy items compared to last year, May 2015

Tech Innovations Should Target Urbanites

Urbanites are using more restaurant and payment apps

Figure 27: LSR burger and chicken concepts: consumers using technology such as mobile payments or mobile ordering "more", May 2015

Appendix – Data Sources and Abbreviations

Fan chart forecast

Consumer survey data

Mintel Menu Insights

Abbreviations and terms

Abbreviations

Terms

Appendix – Market

Figure 28: Total US sales and forecast of market, at inflation-adjusted prices, 2009-19

Figure 29: Total U.S. sales and forecast of limited-service eating places, at current prices, 2009-19

Appendix – Consumer

BUY THIS REPORT NOW VISIT: store.mintel.com

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

EMAIL: reports@mintel.com



Report Price: £2466.89 | \$3995.00 | €3133.71

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

Figure 30: Attitudes/ Opinions About foods cooked with lots of spices; "agree"

Appendix – Top Burger and Chicken Sandwich Ingredients

Burgers: Top 10 ingredients on menus

Chicken Sandwich: Top 10 ingredients on menus

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com