

## Burger and Chicken Restaurants - UK - September 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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



“The biggest threat to the popularity of burger and chicken is the trend of consumers cutting back on eating meat. This is being driven by Younger Millennials who have either adopted a full-time vegan lifestyle or are simply eating more plant-based dishes. Operators now need to tackle this issue by offering consumers more varied choice, including vegan burgers.”

– **Trish Caddy, Foodservice Analyst**

This report looks at the following areas:

- **A meaty issue**
- **A sweet problem**
- **Just how price-conscious are Millennials?**

Much of the growth in the burger and chicken restaurants market has been driven by brands pushing digital innovation and developing new takeaway and home delivery options. Meanwhile, sit-down restaurant chains have become destination businesses through offering healthier options, a higher quality of food, and a greater customer experience.

The biggest threat to the popularity of burgers and chicken is the trend of consumers cutting back on eating meat. Meanwhile, the frugal mentality continues to be deeply ingrained, which is likely to have some impact on discretionary spending on eating and drinking out-of-home.

The forecast population growth of 5-14-year-olds over the next five years bodes well, given that parents of under-16s are most likely to visit a burger or chicken outlet/restaurant on a regular basis. This means catering for families will be increasingly important, including the reformulation of calorific recipes to help parents make healthier food and drink choices when eating out with their young children.

**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)

### 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 - September 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

The combined burger and chicken restaurants market is growing

Figure 1: UK burger and chicken restaurants market, value sales and forecast, 2013-23

Figure 2: UK burger and chicken restaurants market, value sales and forecast, 2013-23

McDonald's holding up the burger sector

Figure 3: UK burger restaurants market, value sales and forecast, 2013-23

Chicken sector expected to bounce back from supply chain problem

Figure 4: UK chicken restaurants market, value sales and forecast, 2013-23

Companies and brands

McDonald's wins

Figure 5: Selected leading burger and chicken restaurant chains, by outlet numbers, 2014-18

The consumer

Rise in burger visits bolster the whole market

Figure 6: Usage of burger and chicken restaurants, May 2018

More than half of Brits visit McDonald's

Figure 7: Venues visited, May 2018

Young families visit regularly

Figure 8: Frequency of eating in or getting a takeaway from fast food outlets, May 2018

Younger Millennials jaded by meat

Figure 9: Burger and chicken outlet/restaurant behaviours, May 2018

Food and drink reformulation appeals to older diners

Figure 10: Healthy factors consumers would most like to see introduced, May 2018

Human customer service more important to older diners

Figure 11: Attitudes towards burger and chicken outlets/restaurants, May 2018

What we think

### Issues and Insights

A meaty issue  
The facts  
The implications  
A sweet problem  
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 - September 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Just how price-conscious are Millennials?

The facts

The implications

## The Market – What You Need to Know

The combined burger and chicken restaurant market is growing

Market faces a tough trading environment

Consumers cutting back on eating meat

## Market Size, Segmentation and Forecast

Figure 12: UK burger and chicken restaurants market, value sales, 2013-23

Market faces a tough trading environment

Figure 13: UK burger and chicken restaurants market, value sales and forecast, 2013-23

Burger segment continues to dominate the market

Figure 14: UK burger restaurants market, value sales, 2013-23

McDonald's: the crutch that is holding up burger sector

Figure 15: UK burger restaurants market, value sales, 2013-23

Poultry sector mistakes undo the good work of 2017

Figure 16: UK chicken restaurants market, value sales, 2013-23

Chicken sector expected to bounce back

Figure 17: UK chicken restaurants market, value sales and forecast, 2013-23

Forecast methodology

## Market Drivers

Confidence holding up but many remain cautious

Figure 18: Trends in how respondents would describe their financial situation, June 2009-June 2018

NLW and NMW continue to put pressure on operators

Out-of-home meals less appealing to ageing population

Figure 19: Change in age structure of the UK population, 2012-17 and 2017-22

Britain's new diet goals

Doctors calling for fast food zoning

Acrylamide legislation brought into force

## Companies and Brands – What You Need to Know

McDonald's: the crutch that is holding up burger sector

Burger King bounces back

KFC recovers from "great chicken crisis"

## Key Players

Figure 20: Selected leading burger and chicken restaurant chains, by outlet numbers, 2014-18

McDonald's

Figure 21: Key financial data for McDonald's Restaurants Ltd, 2014-16

KFC

**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 - September 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 22: Key financial data for Kentucky Fried Chicken (GB) Ltd, 2014-16

Nando's

Figure 23: Key financial data for Nando's Chickenland Limited, 2014-16

Famous Brands

Wimpy

Figure 24: Selected gourmet burger and chicken outlets, by outlet numbers, 2016-18\*

GBK

Figure 25: Key financial data for Gourmet Burger Kitchen Limited, 2014-16

Byron

Figure 26: Key financial data for Byron Hamburgers Limited, 2015-17

Ones to watch

KerbEdge

Wing Wing

Wingstop

## Competitive Strategies

Refurbishment

Consolidation

Bridgepoint to back Burger King UK

Refinancing

Honest Burgers secures £17 million refinance deal

## Launch Activity and Innovation

Digital activity

Flyt links delivery orders to KFC kitchens

Bluetooth locators

Nando's launches click-and-collect

Digital payments

Distribution changes

Honest Burger expands west

Dark kitchens to create additional revenue stream

McDonald's US tests corporate catering

Nando's grows supermarket range

Travel hubs and leisure destinations

Conversions

Menu innovation

Menu collaboration

Vegan options

## Advertising and Marketing Activity

Burger and chicken chains increased ATL expenditure by 12% in 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 - September 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 27: Advertising expenditure by selected burger and chicken operators, 2013-18

Burger King ramps up TV spend

Figure 28: Advertising expenditure by selected burger and chicken restaurants\*, by media type, 2013-18

Nando's dials up digital and press

KFC the radio hero

Nielsen Ad Intel coverage

## Brand Research

Brand map

Figure 29: Attitudes towards and usage of selected brands, June 2018

Key brand metrics

Figure 30: Key metrics for selected brands, June 2018

Brand attitudes: both McDonald's and Nando's seen as consistently high quality

Figure 31: Attitudes, by brand, June 2018

Brand personality: Wimpy most boring of all

Figure 32: Brand personality – Macro image, June 2018

KFC and Nando's have an authentic brand image

Figure 33: Brand personality – Micro image, June 2018

Brand analysis

Nando's wins with young diners, families, and Londoners

Figure 34: User profile of Nando's, June 2018

McDonald's is accessible, trustworthy, and value-for-money

Figure 35: User profile of McDonald's, June 2018

KFC is trustworthy, innovative, and offers good value

Figure 36: User profile of KFC, June 2018

Burger King is accessible but lacks good value and brand trust

Figure 37: User profile of Burger King, June 2018

Wimpy blighted by a stale image

Figure 38: User profile of Wimpy, June 2018

## The Consumer – What You Need to Know

Rise in burger visits bolster the whole market

More than half of Brits visit McDonald's

Young families visit regularly

Younger Millennials jaded by meat

Food and drink reformulation is most effective

Human customer service is the cornerstone of a good dine-in experience

## Usage Habits

Poultry industry challenges have hit chicken footfall

But the rise in burger visits will bolster the whole market

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 - September 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

Figure 39: Usage of burger and chicken restaurants, May 2018

Promisingly, chicken is winning over the youth

Figure 40: Usage of burger and chicken restaurants, by generations, May 2018

## Venues Visited

McDonald's continues to thrive

Figure 41: Venues visited, May 2018

Burger King bounces back

Chicken visitation takes a hit

Consumers like to mix it up

Figure 42: Repertoire of venues visited, May 2018

## Frequency of Use

Busy people eat at McDonald's and Burger King more often

Nando's frequent visits on a par with KFC's

Figure 43: Frequency of eating in or getting a takeaway from fast food outlets, May 2018

## Burger and Chicken Restaurant Behaviours

Burger and chicken shop proximity is key

Figure 44: Burger and chicken outlets/restaurant behaviours, May 2018

16-44s more likely to look for value deals

Snacks attract 16-44-year-olds

Younger Millennials misguided about meat

## Healthy Factors Influencing Choice

Food and drink reformulation is most effective

Figure 45: Healthy factors consumers would most like to see introduced, May 2018

Nudging under-45s with rewards and punishments

For young families, actions speak louder than words

## Attitudes towards Burger and Chicken Restaurants

Older diners look for customer service in a restaurant

Figure 46: Attitudes towards burger and chicken outlets/restaurants, May 2018

Potential to encourage diners to use own containers

Figure 47: Attitudes towards burger and chicken outlets/restaurants, by venues visited, May 2018

Happy Hours can enhance value-for-money amongst Millennials

Figure 48: Attitudes towards burger and chicken outlets/restaurants, by venues visited, May 2018

'Fake meat' can't beat fresh veg

Older women consider chicken healthier to eat than red meat – CHAID

Figure 49: Burger and chicken restaurants – CHAID – Tree output, May 2018

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

Abbreviations

**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 - September 2018

Report Price: £1995.00 | \$2693.85 | €2245.17

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

### Consumer research methodology

#### CHAID Methodology

Figure 50: Burger and chicken restaurants – CHAID – Table output, May 2018

### Appendix – Market Size and Forecast

#### Forecast methodology

Figure 51: UK burger and chicken restaurants market, value sales, best- and worst-case forecast, 2018-23

Figure 52: UK burger restaurants market, value sales, best- and worst-case forecast, 2018-23

Figure 53: UK chicken restaurants market, value sales, best- and worst-case forecast, 2018-23

**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)