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Fish and Chips

Two-year overview ending Sept "21

A market insight analysis
(20m read)

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Fish and Chips Two-year overview ending Sept "21

This market insight factsheet provides a full picture of Fish and Chips as a meal in Great Britain (GB) foodservice, analysing data from September 2019 to September 2021. This includes:

Top takeaways

Continued recovery to fish and chips throughout the pandemic

- Fish and chips servings declined by 10% but this outperformed total seafood servings out of home (OOH), which declined by 20% in last two years
- 39 million less fish and chips servings over the course of the pandemic
- 65% of all fish and chips servings OOH are from Fish and Chip Shops
- Fish and Chips are mostly enjoyed by those over 50
- Friday dinner time remains the most popular time for Fish and Chips

Total seafood performance

Fish and Chips servings outperformed seafood servings OOH in last two years

Q3 2021 Seafood visits and servings have bounced back further to reach 95% of pre-pandemic level
Seafood in foodservice continues to recover well particularly in QSR and Fish & Chip Shops. Even Workplace & Education, one of the hardest hit channels, has started to recover after almost zero activity a year ago.

Visits continue to grow in Q3 2021 up 45% verses Q3 2020 now reaching 95% of pre-pandemic levels. This is a marked improvement compared to Q3 2020 where seafood visits OOH had declined by 34%.

Seafood servings being how many portions of a product were sold, have also bounced back further in Q3, to reach 95% of pre-pandemic levels. Seafood servings represents 5% of total foodservice market and had declined by 5% to year ending September 2021.

In total, seafood servings declined by 20% over the last two years. Fish and Chips meals only declined by 10% reflecting the format better delivery suitability.

Fish and Chip performance

39 million less fish and chips servings over the course of the pandemic

During the pandemic servings of Fish and Chips decreased across all channels
Fish and Chips are a popular way for consumers to enjoy seafood, with Fish and Chips served as a meal representing around 21% of all the seafood servings consumed in foodservice.

In the two-year ending (2YE) September 2021, 337 million servings of fish and chips were sold. This was a decrease of 10% when compared to 2YE September 2020. This drop accounted for 39 million less fish and chips servings over the course of the pandemic.

Where is Fish and Chips purchased?

65% of all Fish and Chips servings OOH are from Fish and Chip Shops

Fish and Chips are enjoyed in six different channels
The six OOH channels when added together, comprise the total OOH sector. These are quick-service restaurants (QSR); Fish and Chip Shops; Pubs; Full-service Restaurants (FSR); Travel and Leisure; and Workplace and Education. Of all Fish and Chips servings in the 2YE September 2021; 65% are from Fish and Chip Shops, 11% from Pubs, 8% from FSR, 8% from QSR, 7% from Workplace & Education and 1% from Travel & Leisure.

During the pandemic the worst hit channel was Travel & Leisure where there were 71% less servings of Fish and Chips. Fish and Chip Shops fared better in terms of year-on-year change with just 4% of servings lost, but that still accounted for the 2^nd highest channel of loss of servings at 8 million. The biggest hit to servings was from Pubs where 11 million servings of Fish and Chips were lost to this channel.

In terms of visits for Fish and Chips, visits increased in total out of home (OOH) when comparing 2YE September 2020 to 2YE 2021. This increase in visits came from Pubs and Fish and Chip Shops.

Who is the Fish and Chips consumer?

Fish and Chips are mostly enjoyed by those over 50

45% of Fish and Chip servings are to consumers over 50 years old
Fish and Chips are most popular with the older generations mirroring the total seafood consumer. It under performs vs. total food and drink with the younger consumer particularly in pubs where over 55% of Fish and Chips consumers are over 50, this is compared to total food and drink servings where just 25% of consumers are over 50.

71% of fish and chip servings are to A, B, and C1 consumers
Fish and Chips strongly over indexes with the more affluent consumers. This increases particularly in pubs where 79% of Fish and Chip servings are too the A, B and C1 consumer. C2, D and E consumers purchase fish and chips the most in Quick Service Restaurants (QSR) the only channel where the less affluent consumer over index compared to total food and drink.

Over 50% of Fish and Chips servings are by women
Over half of all the Fish and Chip servings are to women across all foodservice channels. Women over index particular in Full-Service Restaurants (FSR) where 64% of all Fish and Chips servings are too women. This is an over index to total food and drink servings where over half are to men.

72% of Fish and Chip servings are to adults without children
Fish and Chips performs better with adult only occasions. This is amplified in Pubs where over 80% are to adult only occasions. Although in QSR parties with children account for 43% of servings, more than total food and drink where 34% of servings are to parties with children.

When is Fish and Chips consumed?

Friday dinner time remains the most popular time for Fish and Chips

60% of Fish and Chips servings are consumed at dinner
Dinner remains the most popular time of day for Fish and Chips. It over indexes largely to total food and drink where just 33% of servings are at dinner. This is more apparent for Fish and Chip Shops where over 75% of servings are at dinner time.

Breakfast and lunch are dayparts that are strongly under indexing compared to total food and drink and are opportunities for Fish and Chips.

Fish and Chip Fridays

Fridays remain the most popular day for Fish and Chips with Saturday a close second particularly in Fish and Chip Shops. There is an opportunity for Fish and Chips on Mondays and Sundays as they remain under indexed with total food and drink servings.

Choosing Fish and Chips

Fish and Chips remains a British staple

Socialising with Fish and Chip

The main motivation for consumers eating Fish and Chips is for socialising. This is even more the case in Pubs and FSR and for Fish and Chip Shops and QSR motivations is more for functionality.

Fish and Chips is the 2nd most popular British dish

As chips take the 1st place Fish and Chips take joint 1st place in terms of fame and its popularity has increased 2% in Q3 2021 compared to Q2 according to You Gov.

In terms of popularity, it beats some of the nation’s favorite dishes including roast chicken, bangers and mash and the English Breakfast. They are most popular with Baby Boomers than Gen X and Millennials and more favored by men.

1 in 6 brits choose Fish and Chips as their favourite takeaway

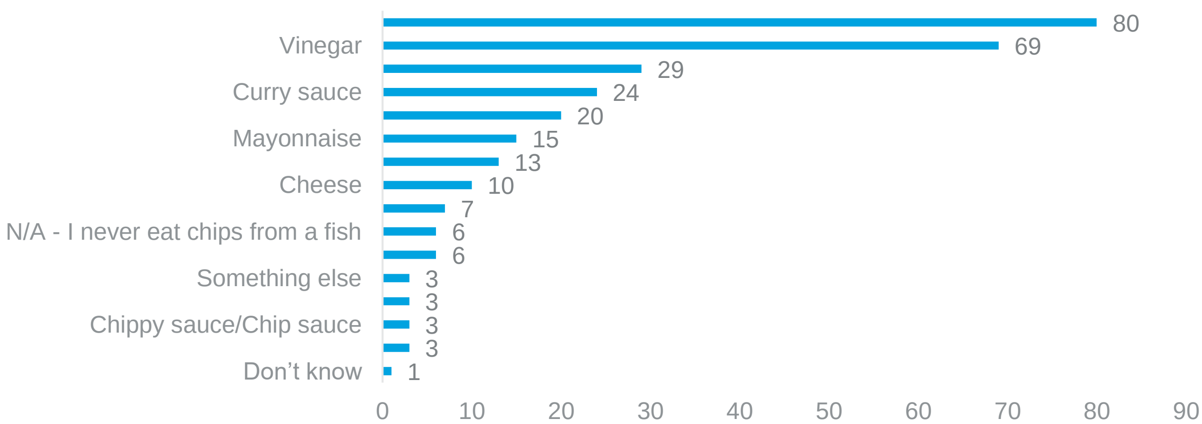
Fish and Chips was ranked Britain’s 3rd favorite takeaway, with around 1 in 6 Brits choosing the meal, beating Pizza, Thai, and Kebabs. Indian took second place just above Fish and Chips and Chinese took the number one spot with 1 in 4 Brits choosing it as their favorite takeaway.

This came from a You Gov survey of over 1,600 adults that also showed how the age of the respondent changed their takeaway of choice. Fish and Chips was the more preferred option for the over 50s with almost a half of this age group choosing the dish. This compared to the under 50s where just 17% choose Fish and Chips as their favorite takeaway.

Salt was the most popular accompaniment to Fish and Chips with 80% of Brits adding it to their meal.

Salt was chosen as the top accompaniment with 80% of over 3,000 British adults choosing salt when asked, “Which of the following do you like to have on or accompanying chips from

Table 1: Which of the following do you like to have on or accompanying chips from a fish and chip shop?



a Fish and Chip Shop?" from You Gov survey in 2020. The top three accompaniments also included vinegar and tomato ketchup and 3% of Brits opted for salad cream and chip spice with their Fish and Chips. See table 1 for a full breakdown.

Fish and Chip Shops

Throughout the pandemic Fish and Chip Shops were one of the best performing channels

Spoilt for choice

There are approximately 10,500 fish and chip shops in the UK. This is more than 9 of the top 10 most popular dining brands in Q3 2021. Those include Greggs, KFC, Pizza Express, Costa Coffee, Pizza Hut, Domino's Pizza, McDonalds, Toby Carvery and Krispy Kreme. Their outlets combined to around 10,022.

Fish and Chip Shops one of the best performing channels in 2021

Throughout the pandemic Fish and Chip Shops were one of the best performing channels, and experienced a comparatively low drop in visits, thanks in part to its ability to offer takeaway services.

70% of the protein sold in Fish & Chip Shops is seafood and 21% of all seafood servings OOH in sold in Fish and Chip Shops. It has gained servings share over the last 12 months, so it remains an important channel for the recovery of seafood consumption OOH. However, Fish and Chip shops have the smallest total OOH visit share of all the channels at just 3.8%.

Fried Fish is the largest product group for Fish & Chip Shops and the biggest growth contributor with Cod is the most popular of at Fish and Chip Shops; Haddock losing its share. Seafood's average spend has been growing in the past year to September 2021 to £4.12 average individual spend up £0.24 on September 2020.

21% of all servings are for Fish and Chips as a meal.

Quarter 1

By far the best performing channel in terms of visits OOH was Fish and Chip Shops. They had the lowest relative decline at 0.2% and at pre-pandemic levels as Q1 2020 experienced 2.4% declines in visits. They were recovering faster than any other outlet. However, they continued to underperform in delivery and drive through options which were key opportunities for the channel.

Quarter 2

Another positive quarter in Q2 Fish and Chip Shops remined the best performing channel OOH, visits to Fish & Chip Shops recovered to 80.0% of pre-pandemic levels. Total spend grew by 4.2% in the last 12 months to reach 88% of pre-pandemic levels. In Q2 2021 visits grew to 89% vs -0.2% in Q1 2021.

Quarter 3

Visit recovery to Fish & Chip Shops started to slow in Q3 2021; visits were above Q3 2020 but were still below 2019 levels. Total spend in Q3 is 14% below Q3 2019 but up 5% on Q3 2020. In the last 12 months total spend has grown 12% on September 2020.

Challenges and opportunities

A big opportunity for Fish and Chip Shops is wider adoption of delivery and click and collect formats.

Mono-product platform

A challenge for Fish and Chip Shops is that their mono-product platform limits customer base development. However, several Fish & Chip Shops have started to diversify widen their menu to include kebabs, hot dogs and curries which looks like it could be a viable solution.

Loyalty

In foodservice, loyalty has always been a key driver of success and it is expected to remain an important factor for people when choosing where they will eat out, with the pandemic elevating this further. To build customer loyalty, consumers need to trust an establishment. Trust has been the main priority for consumers when choosing a place to go during the pandemic.

Many operators are tapping into this opportunity for growth through consumer loyalty and are investing in it through enhanced social media activities, designated loyalty programs, and apps for ordering.

Home delivery and takeaways

Despite the removal of restrictions and reopening of foodservice outlets, people are still ordering millions of takeaways with a reported 59% increase in UK orders between July and September 2021.

Strong performance is expected for the remainder of the year. In the run up to Christmas British adults will be relying on takeaway meals until after the festive period, according to a study of 2,000 adults. Exactly half of which are planning on spending more than usual on takeaways in the run up to Christmas because they are too busy to cook.

Although they aren't expected to replace on-premise dining, and orders have started to slow compared to those during lockdowns, takeaways and meal delivery remains over three times bigger than pre-COVID and look like a habit that's here to stay.

A big opportunity for Fish and Chip Shops is wider adoption of delivery and click and collect formats. Another untapped opportunity is drive thru format which is under-developed in the segment. Considering investing in such offerings would help to capitalise on the current growth.

Additionally, across total OOH, Fish and Chips as a meal could consider the following opportunities:

- Target the younger consumer
- Make Fish and Chips relevant all week, not just Fridays and Saturdays
- Offer quick, portable and cheap snacking options
- Offer options for other dayparts, with breakfast and snacks being key growth areas
- Advancement in technology is changing the way in which consumers purchase Fish and Chips; app-based ordering is becoming more relevant

References

Resources that have been used in this factsheet can be viewed below

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