Market Insight Factsheet
Fish & Chips in Independent Fish and Chip Shops (2018)
Market overview

Independent fish and chip shops remain the largest outlet for fish & chip meals, with 109 million servings in the year to September 2018; taking a 54% share of all fish and chip servings in GB foodservice.

This factsheet provides an overview of the performance of fish and chips as a meal in independent fish and chip shops. It includes both long and short term trends, an overview of who, when and why fish & chips are purchased; along with findings from a recent comprehensive consumer study. Together the insight can be used to grow sales.

Fish & chips can be considered the pioneer of takeaway food in the UK; thought to have originated around the mid nineteenth century it remains a hugely popular dish today. There is no definitive poll, but fish & chips is continuously ranked in the top 10 most popular UK takeaways, despite competition from an increased range of options (British Takeaway Campaign)

What’s happening in GB foodservice?

Overall, foodservice in GB declined through austerity; from 2007 it took until 2014 before the number of servings returned to growth. Seafood servings followed a similar pattern, taking slightly longer before returning to growth in 2015. Whilst uncertainty following the vote to leave the European Union, coupled with a slowing UK economy, rising inflation and stalling wages continues to hit consumer confidence in 2018. But, the impact is yet to be seen on Total OOH servings which remain in growth.

In the 52wks to September 2018, total foodservice was worth £56.2bn, with 28.4bn servings. Seafood in foodservice also continues to grow; in the 52wks to September 2018, GB seafood servings stood at 1.16bn, worth an estimated £4.4bn.

What’s happening with fish & chip meals in foodservice?

Overall in foodservice, fish & chip meal servings grew during the first part of austerity in 2007 before they peaked in 2010. A period of general decline followed until 2015 when fish & chip servings began to grow strongly; they have remained in growth since. In the year to September 2018, total fish & chip servings across the whole of foodservice totaled 201 million, up +13.5% from 2009 and up +5.7% from the previous year.
Market overview

How fish & chip shops compare to the competition?

Independent fish and chip shops are the largest outlet for servings of fish & chips as a meal, taking a 54% share of all fish and chip servings in GB foodservice. 109 million fish & chip meal servings were made in fish and chip shops in the year to September 2018. All channels with the exception of pubs grew fish & chip meal servings vs the previous year. The main competition is from the pubs and full service restaurants (FSR) channels, but even added together both channels still only sold 26% of all fish and chip servings, losing share to workplace and QSR (exc fish & chip shops).

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How fish & chip shops compare to the competition?

The total number of servings of fish & chips in independent fish and chip shops peaked in 2010, followed by a period of decline and variable performance. In 2015 the number of fish & chip servings began to grow strongly and have been in growth since.

Between 2009 and 2018 fish and chip shops outperformed most other channels, growing fish & chips meal servings by 22%. In the year to September 2018, fish and chip shops grew fish & chips servings by 5.2%. The continued growth is undoubtedly driven by a relatively strong value for money proposition and relatively low spend compared to some other channels.

Fish & Chip Servings Share (‘000) by Channel (YE Sept 2018)

Fish & Chip Servings (‘000) in Fish and Chip Shops 2018
Market overview

Fish & Chip Meal Servings by Channel (2009 to 2018)

<table>
<thead>
<tr>
<th>Fish &amp; Chip Meal Servings ('000)</th>
<th>YE Sep 09</th>
<th>YE Sep 10</th>
<th>YE Sep 11</th>
<th>YE Sep 12</th>
<th>YE Sep 13</th>
<th>YE Sep 14</th>
<th>YE Sep 15</th>
<th>YE Sep 16</th>
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<tr>
<td>Total Out of Home (OOH)</td>
<td>177,146</td>
<td>187,074</td>
<td>185,909</td>
<td>176,835</td>
<td>179,290</td>
<td>173,992</td>
<td>166,493</td>
<td>174,541</td>
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<td>Total Quick Service Restaurants (QSR)</td>
<td>103,695</td>
<td>112,504</td>
<td>114,785</td>
<td>106,574</td>
<td>107,483</td>
<td>107,702</td>
<td>101,691</td>
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<td>QSR Fish &amp; Chip Shops</td>
<td>88,955</td>
<td>96,127</td>
<td>95,824</td>
<td>94,145</td>
<td>87,577</td>
<td>89,603</td>
<td>86,241</td>
<td>91,970</td>
<td>103,174</td>
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<td>QSR (ex Fish &amp; Chip Shops)</td>
<td>14,740</td>
<td>16,377</td>
<td>18,961</td>
<td>22,429</td>
<td>19,906</td>
<td>18,100</td>
<td>17,453</td>
<td>15,258</td>
<td>15,906</td>
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<td>31,235</td>
<td>31,969</td>
<td>34,238</td>
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<td>29,904</td>
<td>33,045</td>
<td>34,726</td>
<td>33,980</td>
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<td>Full Service Restaurants (FSR)</td>
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<td>20,561</td>
<td>22,322</td>
<td>21,200</td>
<td>19,846</td>
<td>17,882</td>
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<td>17,927</td>
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<td>Workplace/College/Uni</td>
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<td>Travel &amp; Leisure</td>
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<td>7,038</td>
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<td>5,593</td>
<td>5,599</td>
<td>5,783</td>
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Who’s buying fish & chip meals in fish and chip shops?

Consumers buying fish & chips in fish and chip shops have a significantly older demographic than the average foodservice consumer. In fish and chip shops, the core or largest demographics for fish & chip meals are the 35-49 year olds and 50-64 year olds. Compared to Sept 2017, fish & chips meals are becoming more popular with older consumers, with growth in the demographics over 50yrs. Over the same period, the number of younger fish & chip meal consumers has fallen in age groups 35-49yrs and below.

Female consumers are key to fish and chip meal purchases in fish and chip shops, where nearly 54% of purchases are made by women, compared to 49.9% for the foodservice average. Overall, fish & chip meal consumers in fish and chip shops are slightly less affluent than the average for consumers of fish & chips as a meal across all foodservice.

Across all foodservice channels, including fish & chip shops, eating fish & chips as a meal has become more of an adult only occasion compared with a year ago. But fish and chip shops still remain an important channel for family-oriented purchases.

Fish & Chip Meal Servings by Age and Channel

- Age: 65+
- Age: 50-64
- Age: 35-49
- Age: 25-34
- Age: 18-24
- Age: <18

Fish & Chip Meal Servings by Presence of Children and Channel

- Party w/ kids (0-17)
- Adults Only
**Market overview**

When and why are fish & chips eaten?

Dinner/tea remains the most significant daypart for fish & chips meals in fish and chip shops, taking nearly 78% of servings. This daypart, along with snacking, has increased vs September 2017, while lunch consumption has declined. Both lunch and snacking opens up opportunities for smaller portions and lunchtime specials.

Overall, the most popular day for eating fish & chips in independent fish and chip shops is still Friday (24%), followed by Saturday. Compared to September 2017, there has been growth in Sunday, Thursday and Wednesday servings. Servings on other days, including Friday, are in decline, down from 25.4% in 2017 to 24% in 2018.

The main reasons for shoppers to purchase fish & chips in independent fish and chip shops is still a functional need i.e. ‘hunger’, followed by as a treat. Functionality increased motivation in 2018 vs last year.

How to grow fish & chip servings in fish & chip shops

Building pressure on household budgets and concern around the impact of leaving the EU may slow down growth of fish & chip meals in fish and chip shops in 2018, as shoppers trade down to cheaper proteins like sausages and burgers to save money. Diners may also be attracted out of the fish and chip shop channel into other foodservice channels which offer significantly more discounts and offers. As competition grows, independent fish and chip shop operators can utilise consumer insight to help grow fish and chip sales.

To complement the regular NPD Crest data provided by Seafish, a comprehensive study was undertaken across 580 independent fish and chip shops and 1501 consumers, providing insight into portion sizes, nutritional information and customer perceptions. Quality, portion control and choice are key. The findings, practical advice and support material, including downloadable posters and marketing materials can be found on the portal Enjoy Fish & Chips.
ACTON 1: Introduce a Smaller Portion Offer

There are huge differences between the portions served up in the nation’s fish and chip shops, which can be confusing for customers. There is an opportunity for many fish and chip businesses to adopt standard-sized portions; making changes to portion sizes doesn’t mean proportional changes to the price. By introducing a range of standard portion size options, meals can be served up to suit appetites of all sizes and at different times of the day, to boost income. Making portion sizes more predictable and offering customers more options could make a fish and chip business more competitive.

**Portion Survey Findings**

- 33% said a greater range of portion sizes would encourage them to eat fish and chips more often. That’s more than 17 million people across the UK.
- 45% of consumers would order a smaller portion of chips to cut their calorie intake. Scaled up, that’s almost 23.5 million people who are concerned about their calorie intake but still want to eat fish & chips.
- 21% throw away some of their fish, whilst 44% end up throwing some of their chips away because they can’t eat the whole amount.

A portion of medium cod was found to vary from 93g to 562g

- Smaller portions will appeal to the health conscious and cash strapped 18-24yrs demographic and children in the struggling under 18yrs demographic.
- Smaller portions will also be attractive to the significant proportion of female and older 50yrs+ consumers with smaller appetites
- Smaller portions tie in to opportunities around growing snacking and lunch consumption
- To control portion size use appropriate scoops and portion control boxes to standardise small, medium and large

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*Market Insight: Fish and chips in independent fish and chip shops*
ACTON 2: Focus on Health, Quality & Taste

In the survey, the biggest reason to eat fish and chips more often is if it were healthier. But consumers don’t know that fish & chips cooked properly already has amongst the lowest fat content per 100g of all the takeaways, the issue lies in the huge portion sizes. Consumers today are used to getting more information than ever before about the nutritional content of their food. As an industry, we can help them to make informed choices by displaying important nutritional information in-store in a clear and concise way.

Health & Quality Related Findings:

- 72% would prefer their fish and chips cooked in a way that lowers the saturated fat content. That relates to almost 37.5 million people who fish and chip businesses could appeal to if they introduced different cooking methods.
- Shoppers expect deals but many are prepared to pay more for better quality, this is echoed in foodservice. The importance of quality was highlighted in 2016 as for the first time in surveys, shoppers prioritised quality above price.
- 62% of consumers would like to see nutritional information displayed per portion size.

Use good quality ingredients. Ensure fish has a consistently high freshness, so it is always good to eat.

Raising awareness on the relatively low fat content per 100g of fish & chips compared to other takeaways may be an opportunity.

By letting customers know what cooking methods you are using, you can also help to reassure them that their fish and chips are being cooked with care and with nutritional content in mind.

Use the online calorie calculator on Enjoy Fish & Chips that works out the nutritional content of fish and chips (and/or mushy peas) cooked using a wide variety of different methods and ingredients – such as cooking temperature, cooking time and cooking oil.

Help your staff learn about the nutritional benefits of fish and chips by using this Toolkit.

Promote health benefits of seafood. Fish & chips have one of the lowest typical fat content (9.4g/100g) of any takeaway. Consider using dustings, instead of batter to add flavour and reduce fat content to less than 2% for the fish component.

Feature sustainability and sourcing credentials where possible.
ACTON 9: Focus on Health, Quality & Taste

Meal personalisation is a strong trend running through foodservice in recent years. In the survey, many consumers told us that they would be inclined to eat fish and chips more often if they could build their own ideal meal; choosing from different fish species alongside a range of portion sizes on the menu. The way we buy takeaway food is changing, consumers expectations around waiting times have changed, they expect immediate gratification which is driving the growth of home delivery services such as just eat, hungry house, deliveroo, one-delivery etc.,. Fish and chips have a very high functional motivation to purchase (i.e. people are hungry and want to eat now) so it’s essential to be linked with delivery partners.

Survey Results:

Regular fish and chip consumers who eat it more than once a month said that they would like a greater variety of fish species to choose from, with plaice and haddock at the top of their wish list.

- Customers hate waiting, exploit the high functional desire of takeaway fish & chips by minimising waiting time, by queue management or pre ordering
- Independent fish and chip shops have the lowest deal rates of any foodservice channel. Money saving shopper habits developed during austerity are now the norm. Fish & chip sales are strongly biased to later in the week with Friday and Saturday especially strong. Use deals to drive Sunday to Wednesday sales and look for opportunities to build sales in the growing breakfast/lunchtime daypart
- Exploit the growing functional/snacking opportunity with new portable formats. Offer more product choice around trending ‘food on the go’ or portable formats for fried fish such as wraps, burgers, goujons, bites etc. especially around new formats and deals for children,
- Britishness, nostalgia, tradition and heritage are key levers to increase sales.
- Lever wider foodservice trends with flavoured batters or dustings featuring street food formats with American, South American and Eastern flavours which are currently on trend or the latest emerging trends for warm and spicy Middle Eastern and Hispanic flavours
- Link with premium brands ie Black Sheep beer batter

Most popular fish species not on the menu that customers would like to see featured:

- Plaice 13%
- Haddock 10%
- Hake 8%
- Pollock 8%
- Cod 8%
Top ‘Takeaways’ for fish & chips in fish and chip shops

- Fish and chip meals from independent fish & chip shops are an important way for shoppers to enjoy seafood in foodservice, currently representing around 10% of all seafood servings.
- Independent fish and chip shops are the largest outlet for servings of fish & chips as a meal, retaining a 54% share of all fish and chip servings in GB foodservice.
- 109 million fish & chip servings were made in fish and chip shops in the year to September 2018.
- The core age demographic for fish and chips meals in fish & chip shops remain the 50-64 and the 35-49 consumers; the 18-24 and 35-49 age groups are an opportunity to target.
- Overall and across all channels, fish and chips are more popular with female consumers. Raising awareness with this health conscious demographic around the comparatively low fat content per 100g of fish & chips compared to other takeaways may be an opportunity.
- 72% of consumers would prefer their fish and chips cooked in a way that lowers the saturated fat content.
- Lunchtime consumption and snacking on fish & chips is a key opportunity for independent fish & chip shops. This opens up opportunities for standardizing portion sizes including offering smaller portions and lunchtime specials.
- Exploit the high functional desire – minimise waiting. Focus on ‘ready to eat’ & ‘food on the go’ offering maximum speed and minimum mess. Explore portable formats for fried fish such as wraps, burgers, goujons, bites etc.
(%) values represent change from the previous year unless otherwise stated

- Enjoy Fish & Chips, Web Portal
- Fish & Chips Report Nov 2018, NPD Crest
- The Importance of Lunch in the Traditional Fish & chip Shop Channel, NPD Crest 2018
- Technomic Foodservice Trends 2018
- Fish & Chips in Foodservice (2018 Update)
- Quarterly Foodservice Reports Q1/Q2/Q3 2018, NPD Crest
- Trials to Determine the Fat Content of Fish and Chips, R Watson

More Information:
For the full range of market insight factsheets, covering different sectors of the seafood industry go to the Seafish website - https://www.seafish.org/article/market-insight

Information and insight is available free of charge for levy paying seafood businesses. To have access to the data, click here, fill in your contact details and select the ‘market insight’ newsletter