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Fish and chips

Two-year overview ending Sept ‘22

A market insight analysis
(20m read)

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Fish and chips two-year overview ending Sept '22

This market insight factsheet provides a full picture of fish and chips as a meal in Great Britain (GB) foodservice, analysing data from September 2020 to September 2022. This includes:

Top takeaways

Fish and chips are the most popular British dish, in the two-year ending (2YE) September 2022:

- Fish and chips servings declined by 0.3%
- 1.2 million less fish and chips servings
- Two thirds of all fish and chips servings Out of Home (OOH) are from Fish and Chip Shops
- Half of all servings of Fish and Chips OOH are to the over 50 audience
- Friday and Saturday dinner time is the most popular slot for consuming Fish and Chips

Total seafood performance

Fish and chips servings underperformed verses total seafood servings OOH in last two years

Total seafood visits and servings OOH continue to grow
In the last 12 months, seafood has continued to recover well particularly in Pubs, Full-Service Restaurants (FSR), Travel and Leisure and Workplace and Education. These channels were hit the hardest over the course of the pandemic. Conversely the channels that fared better with the Coronavirus restrictions Fish and Chip Shops and Quick Service Restaurants (QSR), are both experiencing declines in total seafood visits and servings, as on-premises dining becomes more popular with consumers.

Total seafood visits are up 16% in the last 12 months, and 12% verses 2020, but this is still 23% less than pre-pandemic levels. In terms of servings of seafood OOH, being how many portions of a product were sold, they are up 17% on 2020, but 22% less than pre-pandemic levels. Total seafood servings represent 4% of the total foodservice market where total servings are up 32% to year ending September 2022.

Over the last two years, September 2020 to September 2022, total seafood servings grew by 6% with fish and chips declining by 0.3%.

Fish and chips performance

1.2 million less fish and chips servings in the last two years

Fish and chips servings are in recovery but declines from some channels, particularly FSR, is causing overall drop
Fish and chips are a popular way for consumers to enjoy seafood, with fish and chips served as a meal representing around 20% of all the seafood servings consumed in foodservice.

In the 2YE September 2022, 336 million servings of fish and chips were sold. This was a 0.3%* decrease when compared to 2YE September 2021*. This accounted for 1.2 million less fish and chips servings over the course of the last two years.

However, this shows some recovery, as data to 2YE September 2021 showed a 10% decline in fish and chip servings compared with 2YE September 2020. This accounted for 39 million servings of fish and chips lost over the course of the pandemic.

** As of 03/11/2022, we've updated 0.4% and 2YE September 2020 to say 0.3% and 2YE September 2021*

Where are 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 the fish and chips servings in the 2YE September 2022; 65% are from Fish and Chip Shops, 13% from Pubs, 8% from QSR, 7% from FSR, 7% from Workplace & Education and 1% from Travel & Leisure.

During the last two years, increases in fish and chip servings were seen in Pubs (+15.2%), QSR (+2.5%) and Workplace and Education (+1.8%). However, the declines in FSR (-20.3), Travel and Leisure (-6.7%) and Fish and Chip Shops (-0.9%) drove the overall decrease in fish and chip servings OOH (-0.3%).

In terms of visits to OOH for fish and chips, visits decreased in OOH when comparing 2YE September 2021 to 2YE September 2022. This decrease in visits came from FSR (-0.5) and Fish and Chip Shops (-0.3%).

Who is the fish and chips consumer?

Fish and chips are most popular amongst older generations

49% of all fish and chip servings are to consumers over 50 years old
Mirroring the total seafood consumer, fish and chips are most popular with the older generations. It over indexes in the over 50s compared to total food and drink servings where just 26% are from the over 50s and total seafood servings where 34% of servings are from the over 50s. This skew is more apparent in Pubs where over 69% of all fish and chips servings are to the over 50s.

Conversely, consumers under 50 represent 74% of the total food and drink servings OOH whereas only 51% of the servings of total fish and chips are to the under 50s.

69% of fish and chip servings are to a more affluent consumer
In contrast to the age of the fish and chip consumer, servings of fish and chips only slightly over index with the more affluent consumer compared to total food and drink, where 64% of all servings are to the A, B and C1 consumer compared to 69% of the fish and chip consumer.

However, fish and chips do over index with the more affluent consumer, as almost three-quarters of all the fish and chip servings out of home are to them. This is especially so in FSR where 74% of fish and chip servings are to the A, B and C1 consumer.

C2, D and E consumers purchase the most servings of fish and chips in QSR, this is the only channel where the less affluent consumer over indexes compared to total food and drink. However, this still only accounts for 40% of all fish and chip servings, as the more affluent consumer dominates fish and chips servings across all the channels.

52% of fish and chips servings are to women
Over half of all the fish and chip servings OOH are to women. This is across all the foodservice channels with QSR the exception where most servings, 60%, are to men.

This gender skew is particularly apparent in Pubs where 62% of all fish and chips servings are to 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 perform better with the adult only occasion. This is amplified in Pubs where 84% are to adult only occasions. Although in QSR parties with children account for 43% of servings, this is more than total food and drink where 36% of servings are to parties with children.

When are fish and chips consumed?

Dinner on Fridays and Saturdays is the most popular time for fish and chips

Fish and chips are most popular on Fridays and Saturdays
Fridays remain the most popular day for fish and chips with Saturday a close second where a combined 42% of all fish and chip servings occur. This over indexes with total food and drink where 34% of the servings occur. The skew is particularly apparent in QSR where 52% of all its fish and chips servings take place on Fridays and Saturdays, this increase is predominately from Saturdays where 32% of servings are purchased.

There is an opportunity for fish and chips on Mondays and Sundays as they remain under indexed with total food and drink servings; 17% of fish and chips servings and 27% of total food and drink.

61% of fish and chips servings are consumed at dinner
Dinner remains the most popular time of day for fish and chips where 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 78% of servings are at dinner time.

A similar trend for fish and chips at dinner time is across the channels with the exception for FSR where 58% of servings are at lunch. Apart from Fish and Chip Shops, fish and chips servings in all other channels over index at lunch time compared to total food and drink.

A key opportunity for fish and chips is breakfast and snacks, as they strongly under index compared to total food and drink servings; 6% of fish and chips servings in these dayparts verses 36% of total food and drink servings.

Choosing fish and chips

The most popular dish in Britain is fish and chips

Fish and chips are the most popular British dish
Fish and chips take the number one spot for the most popular British dish with its popularity increasing 2% in Quarter 3 (Q3) 2022 compared to Quarter 2 (Q2) 2022, according to a survey by You Gov. They also remain the most famous with 98% of respondents knowing of the dish.

In terms of popularity, it beats some of the nation's favorite dishes including roast chicken, roast beef, beans on toast, bangers and mash and the English Breakfast. They are most popular with Baby Boomers than Gen X and Millennials.

1 in 6 Brits choose fish and chips as their favourite takeaway
Fish and chips were 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 were the preferred option for the over 50s with almost a half of this age group choosing the dish. This was compared to the under 50s where just 17% choose fish and chips as their favorite takeaway opting for pizza and Chinese instead.

Socialising is the main motivation for consumers choosing fish and chips
The main motivation for consumers eating fish and chips out of home is for socialising, with 43% of all servings being driven by this need. In comparison, just 35% of total food and drink servings are for socialising with the total food and drink consumer largely driven to purchases OOH by functional needs as 37% of servings fit this need.

The socialising motivation for fish and chips is particularly apparent in Pubs and FSR with 71% and 77% of servings respectively. Mirroring total OOH the main motivation in Fish and Chip Shops is functional with 54% of servings, and QSR is viewed more as a treat with 40% of servings.

Fish and Chip Shops

Most of the fish and chips served OOH is at Fish and Chip Shops

Spoilt for choice
There are approximately 10,500 fish and chip shops in the UK. This is more than the top seven most popular dining brands of Q3 2022 which include Greggs, McDonalds, Costa Coffee, Pizza Hut, Subway, KFC and Pizza Express. Combined their outlets total around 9,794.

Fish and Chip Shops sales have increased, but this is price led
Throughout the pandemic Fish and Chip Shops were one of the best performing channels and experienced a low drop in visits compared to other channels such as Pubs and FSR, in part thanks to its ability to offer takeaway and delivery services. However, as restrictions have lifted and on-premise visits have increased, both visits and servings of total food and drink in Fish and Chip Shops have declined by 8% and 12% respectively, in the past year to September 2022.

72% of the protein sold in Fish and Chip Shops is seafood and 17% of all seafood servings OOH is purchased in Fish and Chip Shops. Servings have declined by 4% in the last 12 months, but they remain a very important channel for seafood consumption OOH. However, Fish and Chip Shops have the smallest total OOH servings share of all the channels at just 2%.

Fried Fish is the largest product group for Fish and Chip Shops and therefore the biggest contributor to its decline. Cod is the most popular species at Fish and Chip Shops, but it has lost share to Haddock over the past year to September 2022.

Opportunities for fish and chips

A key opportunity for fish and chips is to expand its consumer base

Target a younger and less affluent consumer
Like total seafood, fish and chips should engage more with the younger consumer as they bounce back to pre-pandemic behaviour faster than older generations. As it tends to attract older and more affluent consumers it could benefit from appealing to younger and less

affluent consumers and to adults with children as there is an opportunity to increase fish and chip servings to families.

Seafood can appeal to a younger and less affluent consumer by building on a unique foundation of enjoyment, highlighting health and quality credentials (better living) whilst educating about the different types of species available (choice and convenience).

Make fish and chips a consumer choice, every day of the week

Fish and chips are the most popular British dish, but most servings are purchased on Fridays and Saturdays. There is an opportunity to increase servings by making the dish relevant all week, particularly on Mondays and Sundays.

Offer consumers new and different options

Quick, portable, and cheap snacking and breakfast options are key opportunities for fish and chips as it's currently under-indexing compared with the total market. Quick value, on-the go occasions will also be instrumental in growing the market post pandemic.

Mono-products platforms remain popular

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

Plant-based products

Offering a plant-based option for vegans, vegetarians and flexitarians could increase the overall fish and chips servings. As a key motivation for the fish and chips consumer is socialising, offering varied options for all requirements of the party may prove valuable.

Offering delivery and app-based ordering

It's important to keep an eye on delivery, although growth opportunities are now limited, the service is here to stay and offers consumers convenience. Additionally, app-based ordering has become ubiquitous for multiple channels order points: delivery, pick-up and at-the-table

Make sure a digital (app-based) loyalty scheme is in place

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. This is particularly important as the consumer looks to cut costs, with deals offered directly to the consumer via loyalty platforms.

References

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

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You Gov, February 2021, The UK's favourite takeaways, Webpage

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