Executive Summary

Research background

Mintel was commissioned by the Food Standards Agency (FSA) to conduct research to identify potential supply and demand side factors influencing trends in the gourmet burger restaurant sector.

The FSA has identified some foods as "risky". This includes raw burgers, i.e. burgers that would be considered deliberately less than "fully cooked", including burgers cooked "rare" / "medium-rare". In particular, the Board have indicated concern about the growing trend of burgers being served rare in food service outlets, especially among niche gourmet burger restaurants. The FSA therefore wants to understand the potential drivers of market growth in the UK gourmet burger sector.

This research aimed to:

- Identify potential supply and demand side factors driving growth in the gourmet burger restaurant/outlet sector;

- Understand and quantify market characteristics including the competitive landscape and key market participants;

- Understand and quantify core gourmet burger restaurant users; and

- Identify predictors of future growth in the sector, including anticipated investment, socio-demographic and macroeconomic trends and the role of changing consumer tastes.

The researched comprised a review of existing in-house IP, including UK market intelligence report and the quantitative consumer survey data contained within them, as well as analyst presentations. This was supplemented by desk research across company sources, industry and consumer publications and social media. Mintel also commissioned an additional quantitative consumer survey exploring usage of beef burgers and risky burgers in the foodservice channel.

Key findings

Gourmet burgers are not synonymous with burgers not being fully cooked. However, many gourmet burger venues serve their burgers as pink or 'medium' as standard. Gourmet burger bars are a recent phenomenon in the UK. While the market is growing rapidly, it remains a small and fragmented one. Various operators have announced expansion plans and this will bring new consumers to the market.

The penetration of gourmet burger bars is low, at just 5% of population. 16-34-year-olds, higher income households and ABs, and Londoners and urbanites are the most likely users. Although the chains are positioned as an affordable option in the dining out market, their price points appear to curb usage. As such, the predicted rise in real disposable incomes should, on balance, bring more users to the market.

The picture of potential channels of distribution of risky burgers is complicated by a number of other foodservice businesses offering thicker burgers that could be served pink or rare. The strong margins for the affordable dish bolster burgers' appeal for foodservice operators. Longer term, the development of the UK foodservice market poses established cuisine types, including burgers, with the challenge of holding their ground against the latest trends.

Around half of diners are eating beef burgers in foodservice and 26% of these state having eaten a medium or rare burger in the last two weeks. Preference for medium or rare burgers is fuelled by such burgers being seen to offer a superior eating experience in terms of taste, texture and juiciness. Given that this is a view held by current burger eaters, it is likely be sustained.

Consumer opinions are divided on whether burger restaurants should have the option to cook beef burgers rare, continuing to highlight the thorny issue, and the importance of customer buy-in to steps to address the potential risk posed by beef burgers.

Recommendations

Undertaking a more extensive quantitative survey would offer a means to gauge more comprehensively the size of the overall market and the extent of risk posed by risky burgers. This would need a larger sample size, and would potentially need to be run face-to-face in order to ensure all consumer segments were captured fully.

While preliminary work was undertaken within the scope of this report to established foodservice venues' policies regarding how beef burgers are cooked, in-person visits to foodservice outlets would be recommended in order to understand how those policies are adhered to or executed on-the-ground.

Introduction

Background

The Food Standards Agency (FSA) has a statutory obligation to protect consumers' public health and other interests in relation to food. Part of the FSA's strategic role, emerging from consideration of their organisational strategy 2015-2020, is to enable consumers to make informed choices, allowing them to take greater responsibility for managing the food risks that are personal to them and that they can affect. It requires the FSA to be clear with consumers about the nature and magnitude of the various risks associated with food, the FSA's advice to them, and consumers' responsibility for their own food choices, particularly in relation to vulnerable groups.

At its meeting in November 2014, the FSA's Board agreed that a new framework for the control of risky foods needed to be developed, in order to balance the provision of information to consumers to facilitate informed choice, the management of public health risks, and minimize costs to business caused by these controls. This kind of framework represents a new approach for the FSA, seeking to ensure that both food business operators (FBOs) and consumers are able take an increased responsibility in managing food risks.

The FSA has identified some foods as "risky" – this includes raw burgers, i.e. burgers that would be considered deliberately less than "fully cooked", including burgers cooked "rare" / "medium-rare". In particular, the Board have indicated concern about the growing trend of burgers being served rare in food service outlets, especially among niche gourmet burger restaurants.

In light of this, the FSA is looking to conduct **research to identify potential supply and demand side factors influencing trends in the gourmet burger restaurant sector**.

This study was co-funded by Food Standards Scotland (FSS) - the public sector food body for Scotland. FSS were keen to explore trends in the gourmet burger market in Scotland and the profiles of the consumers who use them.

Aims of the research

This research aimed to:

1) Identify potential supply and demand side factors driving growth in the gourmet burger restaurant/outlet sector in terms of:
   a) Marketing/advertising spend/approach
   b) Planned investment
   c) Consumer taste trends

2) Understand and quantify core gourmet burger restaurant users and market characteristics including the competitive landscape and key market participants in terms of:
   a) Consumer profile i.e. age, ethnicity, sex, socio-economic status
   b) Typical/key target groups
   c) The competitive landscape and key market participants

3) Identify predictors of future growth in the sector including anticipated investment, socio-demographic and macroeconomic trends and the role of changing consumer tastes, including:
   a) Anticipated investment
   b) Socio-demographic trends

c) Whether or not the sector is pro-cyclical
d) Changing consumer tastes

The gourmet burger bar market is explored in detail in this report, having been identified as the key distribution channel for potentially risky burgers, as the nature of the product lends itself to the burger not being fully cooked. The research also aims to explore the role of other foodservice outlets, such as pubs, as potential distribution channels for risky burgers.

Overview of the research design

The beef burger market landscape

Mintel conducted an extensive review of existing in-house IP including UK market intelligence report featuring research across fast food and other relevant foodservice markets and analyst presentations.

This was supplemented by desk research across sources such as company websites, financial reports and press releases, industry and consumer publications and social media to ensure a comprehensive overview of current information specific to the market.

To identify the prevalence of risky burgers through the gourmet burger channel, Mintel conducted a review of company websites and online menus, researched online reviews and undertook trade research contacting a selection of gourmet burger outlets directly.

This enabled Mintel to develop an understanding of the gourmet burger bar market, including the competitive landscape and key market participants, marketing approaches and planned investment, as well as competing and alternative distribution channels for risky burgers.

The beef burger foodservice customer

To identify target consumer profiles for gourmet burger restaurants and build perspectives of consumer attitudes and behaviours within gourmet burger market, Mintel reviewed and analysed quantitative consumer survey data from existing in-house market intelligence reports focused on the chicken and burger bar foodservice market.

To develop an understanding of consumer attitudes and behaviours within the wider foodservice market, which includes both competing and alternative distribution channel for risky burgers, Mintel reviewed and quantitative consumer survey data from existing in-house UK market intelligence reports focused on related foodservice markets.

In order to quantify the prevalence of beef burger and risky burger usage within the foodservice channel, the user profile and key channels, and to explore drivers of demand for risky burgers, Mintel also commissioned an additional quantitative consumer survey exploring these issues. This was beyond the original scope of the project, but Mintel feels that it adds valuable context to the report.

Market drivers

To identify potential supply and demand side factors driving growth in the gourmet burger restaurant/outlet sector, the above research was analysed, as well as reviewing other relevant existing in-house IP.

Mintel also undertook a review of existing in-house US market research reports and analyst presentations as well as knowledge-sharing with US analysts to understand relevant consumer and market trends associated with gourmet burger food service outlets. The aim was to assess the scope to identify key learnings and trends that could be relevant for the development of the UK gourmet burger market restaurant sector.

Online surveys

Across many of Mintel's existing in-house reports, and to explore the prevalence of beef burger and risky burger usage within the foodservice channel, online panels were used.

It is important to note that conducting surveys online has some limitations. Firstly, some 14% of UK adults do not have access to the internet at home, leading to some non-coverage of the population. Secondly, people have to opt in to participate in online panels or specific studies. If the individuals opting in are systematically different from the general population, this self-selection may introduce a bias.

Controls are in place to minimise non-response bias. Furthermore, to ensure our surveys are nationally representative of internet users, Mintel sets quotas for each age group, split by gender. Mintel also sets quotas on region and socio-economic group.

Where consumer survey data is displayed in this report, the month and year of when the research was conducted and the question featured in the survey are provided with the data. Details of quotas set by Mintel for each age group, split by gender, region and socio-economic group are provided in the appendix.

Structure of the report

The report is broken down into the following sections:

- **Chapter 2:** explores characteristics of the gourmet burger bar market, including a brief history of the market, the dominant players' outlet portfolios, turnover, marketing, and expansion plans, and the presence of risky burgers at these venues.

- **Chapter 3:** examines the various alternative foodservice segments that pose competition to gourmet burger bars or that represent alternative distribution channels for gourmet, and therefore potentially risky, burgers. These include fast food venues and pubs as well as other fast casual and barbecue venues.

- **Chapter 4**: examines the public's current usage of gourmet burger restaurants, in terms of: 1) overall usage of gourmet burger venues compared to other chicken and burger restaurants; and 2) the demographic groups that stand out as the most likely users.

- **Chapter 5:** discusses the public's current consumption of beef burgers at foodservice venues, in terms of: 1) uptake and demographic profile of users; 2) the channels used to buy beef burgers; 3) the cooking preference for a 'perfect' beef burger and the reasons for those preferences; 4) penetration of medium or medium rare beef burgers and the demographic profile of users.

- **Chapter 6:** discusses various external trends affecting the gourmet burger bar market, including the effects of the improving household incomes, changes to the age structure of the population, and consumer trends on the market.

- **Chapter 7:** presents overall conclusions and recommendations.

Further information about research methodology, research materials (e.g. questionnaires), and demographic breakdowns of key quantitative survey data is contained in the Appendices.

Terminology

Fast food burger restaurant

Burger bars are a sector of the fast food market. They are largely characterised by the way the leading brands operate, so that a McDonald's or Burger King outlet typifies the burger segment. The way the market has been changing means that although the core product defines these outlets, they also tend to offer other food types such as chicken and vegetarian options.

Gourmet burger

The term *gourmet burger* was first used by gourmet burger restaurants to describe how their offering differed from that of fast food venues, with a focus on burgers freshly made on the premises and on quality ingredients. In particular, the meat patties used in gourmet burgers tend to be significantly thicker than those used in conventional fast food chains. Gourmet burgers are also typically defined by their significantly higher price points compared to fast food burgers.

Gourmet burger bar

Gourmet burger bar or *gourmet burger restaurant* are terms used to refer to specialist foodservice venues, for which gourmet burgers make up the core offering. As well as the product offering, the service format has traditionally differentiated these from fast food venues, with most gourmet burger venues serving orders at the table, not counter, and commonly providing crockery and cutlery.

However, the category is blurring both in terms of barbecue or American-style venues offering a strong burger offering and in terms of more high-priced quality-led operators entering the market that adhere to the fast food service formats.

Risky burgers

The term risky burger refers to beef burgers that would be considered deliberately less than "fully cooked".

Abbreviations

FBO	Food Business Operator
FSA	Food Standards Agency
GBK	The Gourmet Burger Kitchen
ONS	Office for National Statistics

Gourmet Burger Bar Market Characteristics

Introduction

In this section we discuss the characteristic of the gourmet burger bar market, including a brief history of the market, the dominant players' outlet portfolios, turnover, marketing, and expansion plans, and the presence of risky burgers at these venues.

This section discusses a selection of leading gourmet burger bar operators. These have been identified for inclusion in the analysis based on their having attracted coverage in leading UK foodservice trade publications. The list is not intended to provide an exhaustive catalogue of all operators in the gourmet burger bar segment. The market is extremely fragmented, and houses numerous small, independent local operators, putting it beyond the scope of this analysis to compile a comprehensive, robust review of all the operators.

Discussion on the operators' expansion plans is based on information that has been made available by the chains.

The data in this section draws from research conducted for *"Burger and Chicken Restaurants", Mintel, August 2015* as well as additional research including a review of leading food service trade press and of information released by the operators in question such as in their annual accounts, press releases and on their websites.

Background

Fast food burger bars have a long-established presence in the UK market. McDonald's for example opened its first restaurant in the UK in 1974. However, gourmet burger bars are a much more recent phenomenon. The largest, and oldest of the current chains, Gourmet Burger Kitchen, began operating in 2001.

Mintel's *Chicken and Burger Bars, UK – March 2006* highlighted the development of the gourmet burger bar sector as a "phenomenon worthy of attention" in 2006, indicating how, though still niche, the format had by then become identifiable. Discussing the positioning of the chains, the report notes that most shared a focus on burgers freshly made on the premises and on quality ingredients, looking to stand out from their fast food competitors. While the 'freshly made' proposition made it possible for the burgers to be served rare, this was a not identified as as a selling point used by the chains at the time.

The volatility of the market is exemplified by the fortunes of the chains highlighted by the report. For example, The Fine Burger Company had five sites at the time, but is now operating just one under the Prime Burger name. Hamburger Union was a three-strong chain in London, closing in 2008. Tootsies, with 26 sites, was sold in November 2005 following "disappointing sales performance". Acquired by The Clapham House Group, a number of the outlets were converted to its GBK format, bolstering its growth.

The main exception to the rule of the early entrants having disappeared from the market since is Gourmet Burger Kitchen. The chain's expansion was buoyed from early on by its acquisition in 2004 by Clapham House Group for £10 million, planning to grow the chain from six to 20 sites by the end of 2006, and operating 22 by April 2007.

Structure of the market

Two leading players stand out in a fragmented market

While the gourmet burger market has grown significantly since the early days, it remains a highly fragmented one, with only two operators reporting more than 50 outlets at the time of writing. The current lack of consolidation partly reflects the churn seen in the market. Only four of the current leading chains have been present for more than five years – GBK, Byron, the Handmade Burger Co and Haché.

While the two leading operators – GBK and Byron – combined account for half of the outlets of the identified operators, their sway over the market is limited. On the one hand, they continue to face mounting competition from smaller gourmet burger operators locally. On the other, they compete for the leisure pound with a raft of other venues serving gourmet-style burgers, such as pubs, and with other casual dining venues such as pizza and pasta restaurants. The competition from other segments is discussed further below.

New wave of entrants since 2010

Meanwhile, the market has attracted a wave of entrants in the last five years. This includes international operators such as Five Guys, Shake Shack and Smashburger, all of which have large established operations in the US. The growth of GBK, Byron and Five Guys goes some way to show that the financial resources available for the operators to draw upon are – unsurprisingly – a key factor facilitating rapid expansion. As such, the entry of larger international players could speed up the growth in outlet numbers.

Gourmet burgers pale in comparison to fast food burger outlets

The list of companies included in this section is not intended to provide an exhaustive account of all operators in the market. In addition to the companies listed, the market includes numerous small local and regional operators. The companies listed here have been identified based on coverage in leading UK foodservice trade publications.

However, even with this limitation in mind, the small total number of outlets of the operators listed underlines the fact that the market is still relatively small compared to the broader foodservice market. By comparison to the 200-odd outlets of the identified gourmet burger chains, the two leading fast food burger chains, McDonald's and Burger King, have some 1,750 outlets in the UK, combined.

FIGURE 1: LEADING GOURMET BURGER RESTAURANT CHAINS, BY OUTLET NUMBERS, AUGUST 2015

Company	Parent company	Number of UK outlets 2010	Number of UK outlets 2015	1st UK outlet opening (Year)	Number of identified Scottish outlets
Gourmet Burger Kitchen	Nando's Group Holdings Limited	54^	64	2001	2
Byron	Hellespont Group	9^^	52	2007	0
Five Guys	Five Guys Enterprises, LLC	-	29	2013	4
The Handmade Burger Co	The Sargeant Partnership Ltd	6	23	2006	5
Honest Burger	Honest Burgers	-	9	2011	0
Burger & Lobster	Burger & Lobster Restaurant Group Ltd	-	8	2011	0
Meat Liquor	Meatailer Ltd	-	7*	2011**	0
Haché	Haché Burger Connoisseurs Ltd	2	5	2004	0
Almost Famous	Beautiful Drinks Ltd	-	4	2012	0
Patty & Bun	Patty & Bun Ltd	-	3	2012***	0
Cleaver	Prezzo/TPG	-	3	2013	0

Shake Shack	Shake Shack Inc	-	2	2013	0
Big Fernand	Big Groupe	-	1	2015	0
Fatburger	Fatburger Inc	-	1	2015	0
Burger Meats Bun	na	-	1	2013	1
Total of above		71	212		12

Note: The above list is not intended to provide an exhaustive list of all operators. In addition to the above, the market houses numerous small, independent local and regional operators. The above have been identified based on coverage in leading UK foodservice trade publications.

*Includes six burger and one chicken restaurant
**Date that it opened its first restaurant, having started as a food van in 2009
***Date that it opened its first restaurant, having previously operated a pop-up
^At March 2011
^^At June 2010

SOURCE: COMPANY ACCOUNTS AND WEBSITES/TRADE PRESS/MINTEL

Leading chains' turnover

Fragmented nature of the market is apparent in operators qualifying as 'small'

As discussed above, the list of companies featured in this section is not intended to provide an exhaustive account of operators in the gourmet burger bar market. However, the fragmented and emerging nature of the market becomes ever more apparent when looking at the turnover data of the identified companies.

Smashburger and Big Fernand are such new entrants that they are yet to submit accounts to the Companies House. Five other identified key operators only submitted abbreviated accounts, where turnover data is not required, because they qualify as small companies. This further signals the niche status of the operators. To qualify as a small company, a company must meet at least two of the following conditions[1]:

- annual turnover must be not more than £6.5 million

- the balance sheet total must be not more than £3.26 million

- the average number of employees must be not more than 50

As such, full accounts with turnover data were only available for five of the identified key operators, outlined below. The small size of many of the operators, which leads to very limited availability of turnover data, therefore reduces the scope for creating a meaningful overall market size through collating comprehensive information on the performance of the leading operators in the market.

GBK and Byron lead the fragmented market

For the five chains for which turnover data is available, the combined turnover comes to some £150 million in the latest period for which data is available. The longest-established players, GBK and Byron, stand in a league of their own with an annual turnover of more than £50 million each. Meanwhile, Five Guys' rapid expansion has translated into turnover growth despite the US chain only entering the UK market in 2013, reporting a turnover of £24 million in 2014.

[1] "Life of a company – part 1: annual requirements – GP2", *Companies House*, July 2015

While the sales per outlet vary considerably from one chain to another, across the five operators these average at some £1 million. However, even if the smaller operators were achieving similar sales per outlet, the small size of the market is apparent when comparing it to the overall burger bar market, where sales in 2014 stood at £3.0 billion[2].

FIGURE 2: LEADING GOURMET BURGER RESTAURANT CHAINS, BY TURNOVER, 2010-2014

GBK Ltd	**2010**	**2011**	**2012**	**2013**	**2014**
Year-end date	28-Mar	27-Mar	25-Mar	24-Feb (a)	23-Feb
Turnover (£m, ex-VAT)	37.32	37.58	39.05	40.65	50.50
Outlets	50	54	53	57	60
Turnover per outlet (£m)	0.75	0.70	0.74	0.71	0.84
Byron Hamburgers Ltd	**2010 (b)**	**2011**	**2012**	**2013**	**2014**
Year -end date	na	26-Jun	01-Jul	30-Jun	29-Jun
Turnover (£m, ex-VAT)	na	17.51	28.57	41.05	55.23
Outlets	na	16	24	34	44
Turnover per outlet (£m)	na	1.09	1.19	1.21	1.26
Five Guys JV Ltd (c)	**2010**	**2011**	**2012**	**2013**	**2014**
Year -end date	na	na	na	28-Dec	29-Dec
Turnover (£m, ex-VAT)	na	na	na	3.61	23.81
Outlets	na	na	na	3	19
Turnover per outlet (£m)	na	na	na	1.20	1.25
The Handmade Burger Co (The Sargeant Partnership Ltd)	**2010 (d)**	**2011**	**2012**	**2013**	**2014**
Year -end date	na	31-Dec	31-Dec	31-Dec	31-Dec
Turnover (£m, ex-VAT)	na	8.70	13.00	14.33	15.24
Outlets	na	5	12	14	16
Turnover per outlet (£m)	na	1.74	1.08	1.02	0.95
Meat Liquour (Meatailer Ltd)	**2010 (e)**	**2011 (e)**	**2012 (e)**	**2013**	**2014**
Year -end date	na	na	na	30-Jun	29-Jun
Turnover (£m, ex-VAT)	na	na	na	6.25	8.44
Outlets	na	na	na	3	5
Turnover per outlet (£m)	na	na	na	2.08	1.69
Total of above					
Turnover (£m, ex-VAT)	na	63.78	80.62	105.90	153.21
Outlets	50	75	89	111	144
Turnover per outlet (£m)	na	0.85	0.91	0.95	1.06

[2] "Burger and Chicken Restaurants - UK". *Mintel*, August 2015

(a) 11 months.
(b) On 28 June 2010, the trade and assets of Byron Hamburgers were transferred to the Company from ASK Restaurants Limited. The results in financial statements for the period ended 26 June 2011 therefore reflect 52 weeks of trading.
(c) First UK outlet opened in 2013.
(d) Accounts for a small company
(e) Total exemption small company accounts up to 2013.

Note: Haché Burger Connoisseurs Ltd; Almost Famous Burgers (Beautiful Drinks Limited); Patty & Bun Ltd; Honest Burgers (Pacific Shelf 1802); Burger & Lobster Restaurant Group Ltd all submitted abbreviated accounts under "Total exemption small company accounts", with no turnover data provided.

To qualify as a small company, a company must meet at least two of the following conditions:
- annual turnover must be not more than £6.5 million
- the balance sheet total must be not more than £3.26 million
- the average number of employees must be not more than 50

SOURCE: COMPANY ACCOUNTS /MINTEL

Planned expansion

Many leading chains plan to grow

Many of the leading chains have announced plans to grow their operations, signalling their confidence in the future potential of the market. The plans suggest rapid growth for the market in the short term, with some 40 new outlets on the cards during 2015/16. This makes for a substantial addition to the 200+ identified outlets at the time of writing. However, as discussed above, such plans have previously come to an abrupt end in this market, as circumstances have changed. Among the more ambitious plans, GBK has announced that it aims to grow from the current 64 outlets to 100 by 2018.

London remains main hub for gourmet burger bars

The growing presence on the market of large chains is likely to see competition heat up, with smaller operators that lack significant financial resources in the danger zone.

The market has considerable growth potential nationally, and where chains expand outside current major cities, this should continue to expand the pool of consumers with access to gourmet burgers, driving growth in the market.

However, consolidation in specific, hotly-competed areas seems likely. For example, almost all of the identified operators are present in Greater London, with more than 100 outlets between them.

Outside London, the operators listed below also have a combined seven outlets in Leeds, seven in Manchester, six in Glasgow, six in Birmingham and three in Cambridge. However, smaller companies are also operating in these markets. For example in Manchester, there are also local gourmet burger operators present, such as Solita and Filthy Cow, underlining that some of the cities are seeing levels of activity in the specialist gourmet burger bar segment that are likely to prove unsustainable.

Rising property prices are a growing barrier

Meat Liquor's co-owned Scott Collins suggested in trade press in April 2015.that the US operators with heavy financial backing who are entering the market are *"paying massive premiums"* for locations. He also stated that the brand is "not going high street" as its ethos is centred around unusual locations, but that *"even if we wanted to, we could not afford to"* due to *"massive brands pushing rents up."*

Similarly, Tom Byng, founder of Byron was quoted in an interview in September 2015 stating that it's *"very hard to find good sites with affordable rents now"* and that it would be *"much harder to launch and scale our business in London now."*

A focus on the same key towns and cities is to be expected given that the specialist formats will require a certain level of footfall and a certain customer demographic. However, comments such as these suggest that the rising property prices threaten to become a barrier to expansion or market entry for smaller players, or could even force smaller operators out of the market.

Market continues to attract international entrants

Among operators committed to entry, but yet to make their mark, US chain Smashburger is expected to open two outlets in 2015 and has set its sights to 35 stores in the UK. Managing Director Tim Lowther has been quoted in the trade press stating in April 2015 that the fast casual market *"is yet to reach its potential"* and that there is *"an exciting long term future ahead with huge potential for brands such as Smashburger"*. However, by October, the chain was yet to open its first location.

Another US operator, FatBurger opened its first London outlet in May 2015, stating in trade press that it had 20 UK stores in the pipeline over the next 5-7 years. The latest US player to announce entry plans was BurgerFi, which stated in July 2015 that a restaurant would open in central London by the end of the year, though no plans for further expansion has been revealed at the time of writing.

Acquisitions suggest investor confidence in the market

Also signalling investors' confidence in the market, Active Private Equity took at 50% stake in Honest Burgers in January 2015, the founders suggesting at the time that *"the opportunity is there for Honest to become a much bigger brand and Active can see that"*. Byron meanwhile was acquired from the Gondola Group by investment group Hutton Collins in October 2013.

On a smaller scale, Handmade Burger Company received a £0.6 million cash injection from Finance Birmingham in July 2015 to refurbish two existing venues and help fit out its new Birmingham outlet.

Internationally, the acquisition by Jollibee Foods Corp. of a 40% stake in Smashburger in October 2015 was described by the latter as providing *"additional energy and resources to Smashburger as we expand"*. It should support the chain's growth plans also in the UK. Shake Shack floated on the New York Stock Exchange in January 2015, seeing the company valued at nearly $2 billion.

Some operators look beyond burgers

However, some operators are going against this trend. For example, the London-based Meat & Shake chain moved from a burger-led to a more smokehouse-based format in May 2015, reportedly to differentiate itself in what was becoming a saturated burger market.

Meanwhile, Meat Liquor's co-founder Scott Collins has been quoted in the trade press as describing the brand as *"not a burger restaurant or a barbecue place"* and as wanting it to *"keep evolving"*. While such a flexible approach is unlikely to mean that burgers are off the menu, it suggests that many operators are open to giving them less weight and willing to diversify their offering in response to changing consumer tastes.

FIGURE 3: LEADING GOURMET BURGER RESTAURANT CHAINS' EXPANSION PLANS, AUGUST 2015

Company	Operators' UK Expansion Plans	Scottish Expansion Plans
Almost Famous	-	-
Big Fernand	-	-
BurgerFi	Plans one location in London by end-2015	-
Burger & Lobster	Four outlets planned between August and December 2015	Reportedly "on the verge of signing a deal" for first Scottish outlet in Aberdeen
Burger Meats Bun	-	-
Byron	Announced in July 2015 plans for around 15 openings over a year.	Reported plans to open a site on West George Street in Glasgow
Fatburger	20 UK stores over 5-7 years	
Five Guys	Liverpool Queens Sq, Cardiff Red Dragon – December 2015; Sheffield Valley, Leicester, Whiteley, Dundee – November 2015	Dundee
Gourmet Burger Kitchen	Plans to open in Bromley (London), Stoke on Trent, Chichester, and Newport 'soon'. Reportedly plans to reach 100 sites by 2018	
Haché	Soho and Greenwich to open in ca 5-6 months	-
Honest Burger	Reportedly hoping to expand to 14 branches by January 2016	-
Meat Liquor	Set to open Islington and Bristol restaurants in 2015. Said to aim to reach 12 sites by the end of 2017.	Glasgow, 2018
Patty & Bun	-	-
Shake Shack	Set to open a third London site and one in Cardiff (both in 2015/16). Looking for a 'handful' of London sites by 2018 and 'eyeing' sites in four other cities.	-
Smashburger	Teamed up with MSG Group, reportedly plans up to 35 stores in the UK, including two in 2015 and 4-5 in 2016.	-
The Handmade Burger Co	Planned openings in Birmingham and Nottingham will take estate to 25 sites in 2015.	-
Total	43 planned new openings during 2015/16	

SOURCE: COMPANY ACCOUNTS & WEBSITES/TRADE PRESS/MINTEL

Marketing

Above-the-line advertising spend

The leading fast food burger chains are among some of the highest spending advertisers in the foodservice market. Meanwhile, the adspend by the gourmet burger brands remains decidedly modest.

The leading chain, The Gourmet Burger Kitchen remains the only operator with above-the-line spend of note over the 2011-15 period. However, even this amounts to less than £0.3 million over the January 2011-September 2015 period. To put this into context, this amounts to less than 1% of the spend by Burger King and less than 0.1% of that by McDonald's.

The low above-the-line spend is another example making the small size and fragmented nature of the market evident, partly stemming from the fact that many of the operators are too small to have significant marketing budgets, lending themselves poorly to mainstream media activity. Meanwhile, the small number of outlets requires marketing to be targeted to a closely-defined geographical area, something which the mainstream media channels are poorly suited for.

Many of the operators have instead looked to drive visibility online, as discussed below.

FIGURE 4: RECORDED ABOVE-THE-LINE ONLINE, DISPLAY AND DIRECT MAIL TOTAL ADVERTISING EXPENDITURE BY LEADING IDENTIFIED GOURMET BURGER OPERATORS AND LEADING BURGER BAR CHAINS, 2011-15

	2011	2012	2013	2014	2015*
	£'000	£'000	£'000	£'000	£'000
McDonald's Restaurants Ltd	50,656	48,446	71,961	68,685	55,338
Burger King (UK) Ltd	7,330	8,928	9,480	6,048	6,298
Gourmet Burger Kitchen	29	35	33	70	112
Handmade Burger Co	4	-	-	-	1
Hache Burger Connoisseurs	1	0	-	-	-
Burger Meats Bun	-	-	0	-	1
Total of above	58,021	57,410	81,474	74,803	61,749

*January-September 2015

Note: There was no ad spend data recorded by Nielsen Media Research for the other operators listed above as leading gourmet burger bars. Data for McDonald's and Burger King is provided for context.

SOURCE: NIELSEN MEDIA RESEARCH/MINTEL

Social media presence

The leading gourmet burger bar operators now have an online presence as standard, including their own websites as well as a presence on social media such as Facebook and Twitter.

Research for Mintel's Eating Out: The Digital Consumer[3] report found that 78% of survey respondents used Facebook, among 2,000 internet users aged 16+. 52% of survey respondents used it at least once a day, rising to 66% among those aged 16-34. The same survey found that 45% of respondents had used Twitter, including 17% at least daily, this rising to 29% among 16-34s. This testifies to the potential reach of social media, particularly among the under-35s.

Against this background, and reflecting the typically young key audience of gourmet burger bars, the online platform offers a relatively low cost, targeted channel for them to build visibility.

However, research for the same report found that posts about a food/drink venue on social media by friends/family (eg a tweet, a 'like') had prompted just 8% diners who are social media users to use one food/drink venue over another, rising to 11% among 16-34s. As such, while the leading gourmet burger bars' social media following is a relevant indicator of awareness, the ability of this to drive further footfall remains limited.

FIGURE 5: SOCIAL MEDIA PRESENCE OF THE LEADING IDENTIFIED GOURMET BURGER OPERATORS AND LEADING BURGER BAR CHAINS, OCTOBER 2015

Company	Company website	Facebook likes '000	Tweets '000	Twitter followers '000	Instagram followers '000

[3] "Eating Out: The Digital Consumer - UK". *Mintel*, April 2015

McDonald's	http://www.mcdonalds.co.uk/	59,846.2	22.0	170	n/a
Five Guys	https://www.fiveguys.co.uk/	980.7	15.8	23.1	n/a
Burger King	http://www.burgerking.co.uk/	219.4	3.7	15.4	0.4
Gourmet Burger Kitchen	http://www.gbk.co.uk/	60.0	31.7	19.5	5.8
Meat Liquor	http://meatliquor.com/	36.7	3.3	45.2	8.0
The Handmade Burger Co	http://handmadeburger.co.uk/	33.7	17.8	13.6	3.6
Byron	https://www.byronhamburgers.com/	26.4	31.2	21.8	7.8
Burger & Lobster	http://www.burgerandlobster.com/home/	23.2	6.6	27.1	11.7
Shake Shack	https://www.shakeshack.com/	10.5	8.4	17.1	13.8
Patty & Bun	http://pattyandbun.co.uk/	7.4	6.8	28.6	10.7
Haché	http://www.hacheburgers.com/	6.8	4.7	4.5	1.4
Honest Burger	http://www.honestburgers.co.uk/	4.5	11.2	28.4	9.0
Burger Meats Bun	http://www.burger-meats-bun.co.uk/	4.2	2.2	1.6	0.9
Big Fernand	http://www.bigfernand.co.uk/	2.0	1.7	1	0.4
Smashburger	http://smashburger.com/	n/a*			
Almost Famous	http://almostfamousburgers.com/	n/a**	n/a	n/a	n/a

*No separate UK account
**Each venue has its own Facebook and twitter accounts account
Note: Data for McDonald's and Burger King is provided for context.

SOURCE: COMPANY WEBSITES/FACEBOOK/TWITTER/INSTAGRAM/MINTEL

Risky burgers at leading chains

Methodology

Mintel followed a three-pronged approach to ascertain whether the identified leading chains serve pink or medium burgers:

1) a review of customer comments on third-party sites online;

2) a review of the operators' menus;

3) calling two-three venues for each chain to request staff to describe how the burgers are served and the presence of a company-wide policy on the matter. The reviews and interviews were undertaken 22nd-31st October 2015.

It is important to note that a review of customer comments on third-party sites has some limitations, in that Mintel cannot gauge the accuracy of such reviews. However, where several reviewers have made comments on pink or medium burgers, this has been recorded the summary table below and taken as a likely indication of accurate customer experience.

Only one occasion was identified where a customer review implied that a burger was served 'pink in the middle', where the restaurant had stated a policy of being "unable to cook a rare burger for our customers". In all other cases, the restaurants either had referenced raw burgers on the menu, or had not stated a policy on the menu but had referenced raw burgers in the phone interviews.

It should also be noted that the knowledge-level of staff members at individual outlets may vary, and may not reflect the chain's policy. However, the responses from staff are likely to be indicative of the experience customers will face at the outlet level.

Most leading chains serve burgers medium or pink

Gourmet burgers are not necessarily served rare. However, the typically thicker beef patties and the 'connoisseur' positioning of many of the gourmet burger venues have led to many of the identified leading operators serving their burgers as pink or cooked to 'medium' as standard.

Indeed, many of the venues spell this out on their menu as part of the description of the burgers, suggesting that they perceive it as selling point. For example, Byron describes its burgers on the menu as "four cuts of properly sourced British beef, ground fresh into 6oz patties and cooked medium (or however you like it)."

The founder of Byron, Tom Byng was quoted in an interview in September 2015 as stating that Byron serves 100,000 customers a week and that "the vast majority will have a hamburger", providing some gauge of the scale of these operators.

FIGURE 6: MENTIONS OF PINK/MEDIUM BURGERS BEING AVAILABLE AT LEADING IDENTIFIED GOURMET BURGER OPERATORS' VENUES, OCTOBER 2015

Company	Mentions in online reviews	Mentions on the menu	In staff description of burgers by phone
Gourmet Burger Kitchen	Y	N	Y
Byron	Y	Y	Y
Five Guys	Y	N	Y
The Handmade Burger Co	N*	N	N
Honest Burger	Y	Y	Y
Burger & Lobster	Y	N	Y
Meat Liquor	Y	Y	Y
Haché	Y	Y	Y
Almost Famous	Y	N	Y
Patty & Bun	Y	N	Y**
Burger Meats Bun	Y	N	na
Shake Shack	Y	Y	na
Big Fernand	Y	Y	Y
Cleaver	Y	Y	na

Note: where there were no mentions of pink/medium burgers on the menu, this does not mean that the venue has stated that these would not be served. Rather, in most cases it means that no explicit reference was made on the menu to the serving temperature or level of cooking of the burgers.

*Most reviews talk about fully cooked, one mentions pink in the middle
**Staff referenced making sure burgers are cooked at 75 degrees for 8 minutes

SOURCE: MINTEL

FIGURE 7: MENU DESCRIPTIONS REFERENCING PINK/MEDIUM BURGERS, OCTOBER 2015

Company	
Byron	"A Byron hamburger is made to our own recipe: four cuts of properly sourced British beef, ground fresh into 6oz patties and cooked medium (or however you like it)."
Honest Burger	"Burgers are cooked medium/pink unless otherwise requested"
Meat Liquor	"Our burgers are cooked slightly pink, please inform your burgerette if you prefer your meat well done"
Haché	"All our beef steak burgers will be served medium unless requested otherwise."
Shake Shack	"All burgers are cooked medium unless otherwise requested."
Big Fernand	"We prepare homemade french burgers with premium meat cooked as you want from raw to burned."

Cleaver	"Burgers – Handmade with Ayrshire, Scottish beef, cooked medium"

SOURCE: COMPANY MENUS/MINTEL

Conclusions

Gourmet burger bars are a recent phenomenon in the UK foodservice market. The oldest of the current chains, Gourmet Burger Kitchen, began operating in 2001. Many of the early entrants have exited the market, evidencing its volatile nature. Gourmet burgers are not synonymous with burgers not being fully cooked. However, the typically thicker beef patties and the 'connoisseur' positioning of many gourmet burger venues have led to many of the identified operators serving their burgers as pink or 'medium' as standard.

While the market has grown significantly, it remains a fragmented one, with only two operators reporting more than 50 outlets. The lack of consolidation partly reflects churn and the entry of a wave of operators since 2010. Its fragmented and emerging nature is apparent from the fact that many companies are exempt from reporting turnover due to qualifying as 'small'.

The combined turnover of the five chains reporting this comes to some £150 million. This compares to sales of £3.0 billion in the overall burger bar market.

Various established brands and numerous large US entrants have announced ambitious expansion plans. Where the operators are moving beyond their current, largely metropolitan, base, this will bring new consumers to the market. However, many operators are currently targeting the same key cities for growth, requiring a certain level of footfall and a certain customer demographic. Nonetheless, the overlap will dampen the growth of the market as a whole. Consolidation in specific, hotly-competed areas seems likely. Some operators are diversifying their offering beyond burgers in response.

The leading fast food chains are among the highest spending advertisers in the foodservice market. The small size of the gourmet burger bar segment is apparent in the modest ad spend. However, most operators now have an online presence as standard, many attracting tens of thousands of followers.

Competing and Alternative Channels

Introduction

In this section we discuss the characteristic of the various alternative foodservice segments that pose competition to gourmet burger bars or that represent alternative distribution channels for gourmet, and therefore potentially risky, burgers. These include fast food venues and pubs as well as other fast casual and barbecue venues.

In addition to research into current market trends, this section draws on *"Burger and Chicken Restaurants - UK"* report by Mintel published in August 2015 and on Mintel's *"Pub Catering – UK"* report published in May 2015. Consumer research was commissioned by Mintel for both reports. Details of the survey and demographic breakdowns are provided in the appendix.

Fast food venues

Price points

Gourmet burger bars have from their inception focused on a positioning differentiated from fast food venues, concentrating on burgers freshly made on the premises and on quality ingredients.

The significantly higher price points also differentiate the gourmet venues from the fast food outlets. For example, the leading chain, Gourmet Burger Kitchen prices its standard sized burgers from £6.85 upwards[4] and Byron from £6.75 upwards[5]. By comparison, McDonald's long-standing 'saver menu' features burgers starting at £0.99, while the Big Mac typically sells for some £2.89 at the time of writing, though prices differ by location.

As discussed in the consumer section, the higher price leads to gourmet burger bars attracting a noticeably different customer profile to that seen at fast food burger restaurants, although the ubiquity and popularity of standard fast food restaurants means that there is still a sizeable overlap between the customer profiles. Broadly speaking, gourmet burger customers tend to be significantly more affluent, as well as being more likely to be urban-based.

Operating format

Another key point of difference is the operating format. The fast food chain concept has traditionally centred on customers ordering at the counter, with pre-prepared dishes enabling the order to be immediately fulfilled, translating to speed of service and relatively low staff costs.

While many gourmet burger bars have adopted the counter order format, most prepare dishes on demand as part of their USP centred on freshness. This translates to a longer waiting time for orders, while most venues provide table service. These factors play a part in the higher prices, but also create a dining experience more closely on a par with a traditional restaurant meal than a fast food meal.

In light of these differences, the performance of the fast food burger market does not lend itself as a basis for projections of the performance of the gourmet burger bar market.

[4] http://www.gbk.co.uk – retrieved 23rd October 2015.
[5] https://www.byronhamburgers.com – retrieved 23rd October 2015.

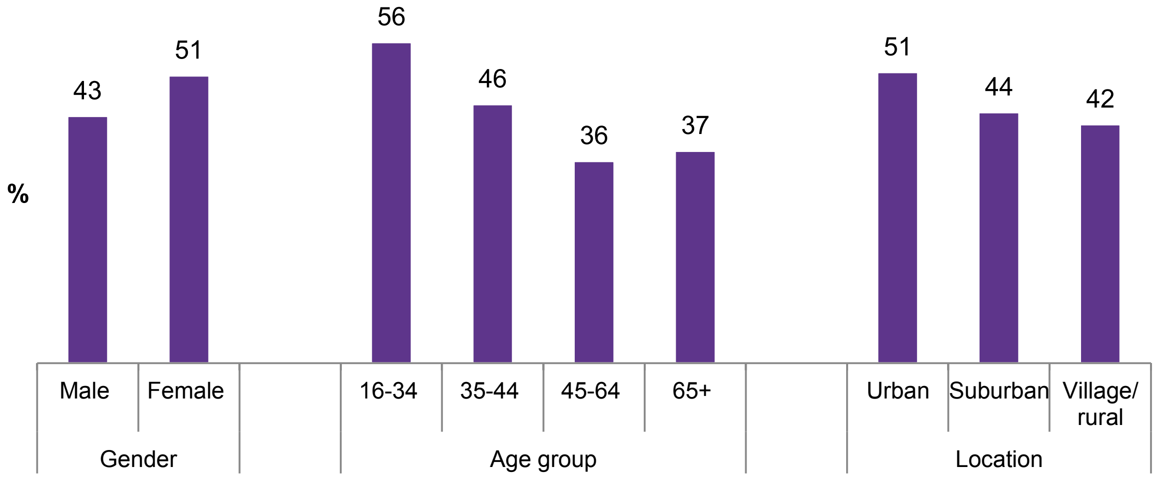
Customer aspiration to trade up

Consumer research conducted for *"Burger and Chicken Restaurants", Mintel, August 2015*, found that among survey respondents who had eaten in or bought a takeaway from a fast food restaurant in the three months to May 2015, 47% agreed with the statement "If I had more money I would eat at other food outlets/restaurants more instead of fast food restaurants". The gourmet burger chains are among the most likely beneficiaries thanks to their more premium offering of the same dish.

Agreement with this statement is higher among 16-34s than older age groups and among urban dwellers than those living in suburban or rural areas. Both groups are current core users of fast food venues, making this interest in switching up a particular concern for the market.

FIGURE 8: AGREEMENT WITH THE STATEMENT "IF I HAD MORE MONEY I WOULD EAT AT OTHER FOOD OUTLETS/RESTAURANTS MORE INSTEAD OF FAST FOOD RESTAURANTS", BY GENDER, AGE GROUP AND LOCATION, MAY 2015

Base: 1,292 internet users aged 16+ who have eaten in or have bought a takeaway from a fast food restaurant/outlet in the last three months



SOURCE: LIGHTSPEED GMI/MINTEL

McDonald's explores customised and gourmet burgers

McDonald's has launched a table service pilot in August 2015 across 12 UK outlets with plans for further roll-out. The new service model invites customers to order from digital kiosks or staff with tablet computers, with the food delivered to their table. Diners are also able to customise their burgers with toppings such as guacamole, grilled mushrooms and different condiments.

This was followed by the launch of the Signature Collection of burgers in November 2015. Positioned as a premium range, the burgers will cost £4.69, be served in brioche-style buns and include the thickest ever patty at McDonald's. The range is due to be trialled at 28 restaurants including outlets in London, the south and Manchester with plans for roll-out to 400 outlets next summer.

Consumer interest in gourmet burgers at fast food venues

In the research for "*Burger and Chicken Restaurants*", Mintel, August 2015 report, 52% agreement was found for the statement "I would be interested in trying gourmet burgers at fast food chains (eg McDonald's)" among respondents who had eaten in or bought a takeaway from a fast food restaurant in the three months to May 2015. This 52% overall agreement consists of 11% who strongly agreed and 41% who agreed with the statement. The high agreement provides further evidence of the interest amongst consumers in value-added propositions in the burger market.

The sit-down dining experience, more extensive range of toppings and scope to customise the burger to taste offered by the new McDonald's service format all make the dining experience more akin to that at gourmet burger venues. Given the consumer openness to a gourmet proposition at fast food venues, the initiative should help to curb switching up to gourmet venues as incomes rise, if it is rolled out more widely. However, the speed and scope of roll-out will partly depend on the willingness of McDonald's franchisees to buy into the model, entailing additional costs to implement and run.

Strong agreement with the statement "I would be interested in trying gourmet burgers at fast food chains" stands at 11%, but rises to 20% among the A socio-economic group (those in higher managerial, administrative or professional employment) and to 16% among those in a financially healthy situation. That the groups best able to afford to trade up to gourmet burger venues are also the most interested in a gourmet burger offering at fast food venues further underlines the potential competition this poses to the gourmet venues.

There is a clear commercial incentive for mainstream fast food chains to adopt at least some of the characteristics associated with gourmet burger bars, both as a defensive measure against these and as a way of increasing spend among customers.

Thicker burgers and premium breads appeal at fast food venues

Closely related to the interest in gourmet burgers at fast food venues, interest in trying burgers containing thicker meat at a fast food restaurant was reported by 29% of respondents who had eaten in or bought a takeaway from a fast food restaurant in the three months to May 2015[6]. To the extent that this opens up the scope for thicker burgers at fast food venues, it suggests that the segment could become an alternative channel for risky burgers.

Meanwhile, 57% of respondents who had eaten in or bought a takeaway from a fast food restaurant in the three months to May 2015 state that they are extremely or moderately concerned about the quality of meat at used at fast food restaurants[7]. This is likely to limit customer demand for medium or rare burgers at fast food venues.

Other elements of the gourmet burger offering such as interesting toppings and premium breads also appeal to many fast food users. That this extends well beyond the existing pool of gourmet burger bar customers shows clear potential for further expansion of such concepts. While the data suggests an opportunity for fast food chains to claim a stake in this space, until this offering becomes more widespread the gourmet burger venues should be able to capitalise on this demand.

[6] "Burger and Chicken Restaurants - UK", *Mintel,* August 2015.
[7] "Burger and Chicken Restaurants - UK", *Mintel,* August 2015.

FIGURE 9: FAST FOOD RESTAURANT MENU ENTICEMENTS, MAY 2015

"Which, if any, of the following would you be most interested in trying at a fast food restaurant (eg McDonald's, Burger King etc)?"

Base: 1,292 internet users aged 16+ who have eaten in or have bought a takeaway from a fast food restaurant/outlet in the last three months

	%
Burgers containing thicker meat	29
Different types of meat burger (eg pork, lamb, turkey)	28
A greater selection of burger toppings (eg chorizo)	26
Burgers made using more premium bread (eg brioche bun)	24
A greater selection of dips/sauces (eg wasabi mayonnaise)	19
A greater selection of sides (eg deep fried pickles, guacamole)	19
A greater variety of fish/shellfish dishes (eg prawns in a crispy coating, Thai fishcake)	18
A greater variety of vegetarian burgers (eg Quorn burger, Portobello mushroom burger)	17
Mini chicken, beef or veggie burgers (eg sliders)	16
Ethnic-style dishes (eg falafel 'nuggets')	13
Grain-based side dishes (eg quinoa, rice pots)	13
None of these	19

SOURCE: LIGHTSPEED GMI/MINTEL

Pubs

Burgers are a menu staple at pubs

Apart from fast food venues, pubs pose competition to gourmet burger venues, often with similar price points, service formats and a casual dining experience. Most leading pub groups also feature burgers on their menu (see Appendix).

Some pub burgers are pitched close to fast food venues' price points, for example Wetherspoons offers a burger and soft drink priced at £4.99 at selected London outlets. Meanwhile many pubs' burgers stand on a par with gourmet burger venues' offerings on price, this also being reflected in the style of product. For example, Vintage Inns offers a 7oz beef burger "in a brioche bun with smoked cheddar, sweetcure bacon, gherkin relish". The size and toppings indicate a premium positioning.

An example of the ongoing potential that pub operators see in the market, Young's, a leading pubco, launched the Burger Shack concept in May 2015. The outdoor 'shack' structures attached to its pubs serve a range of burgers priced from £7-£9[8]. Since the original two, a further three shacks have opened, with the company understood to be looking for ten or more by July 2016.

Reports in the trade press meanwhile suggest that the Fuller's pub chain requires all managed sites to offer burgers together with four other core dishes, suggesting that its managed portfolio of some 188 pubs can sell as many as 6,000 burgers per day.

Their scale makes pubs a significant channel

Pubs pose substantial competition to the gourmet burger venues and a significant potential channel for risky burgers simply through their widespread presence. The BBPA estimated the number of pubs in the UK in 2014 at 51,900[9]. Thanks to their generalist nature, pubs are able to trade in locations where gourmet burger specialist venues would struggle to secure a high enough footfall.

[8] http://www.burgershack.co.uk/ retrieved 29th October 2015
[9] http://www.beerandpub.com/statistics - 28th October 2015

The recession and its aftermath put pressure on the pub trade, and many operators stepped up their food offering in a bid to drive footfall and attract a wider audience.

The importance of food-led occasions is apparent in consumer research conducted for Mintel's Pub Catering report[10]. Among survey respondents aged 18+, 41% reported that they visited pubs or bars at least once a month to eat in, on a par with those visiting pubs or bars for drinks. Mintel estimates that the pub catering market is worth some £7.3 billion in 2014, further underlining the scale of the channel.[11]

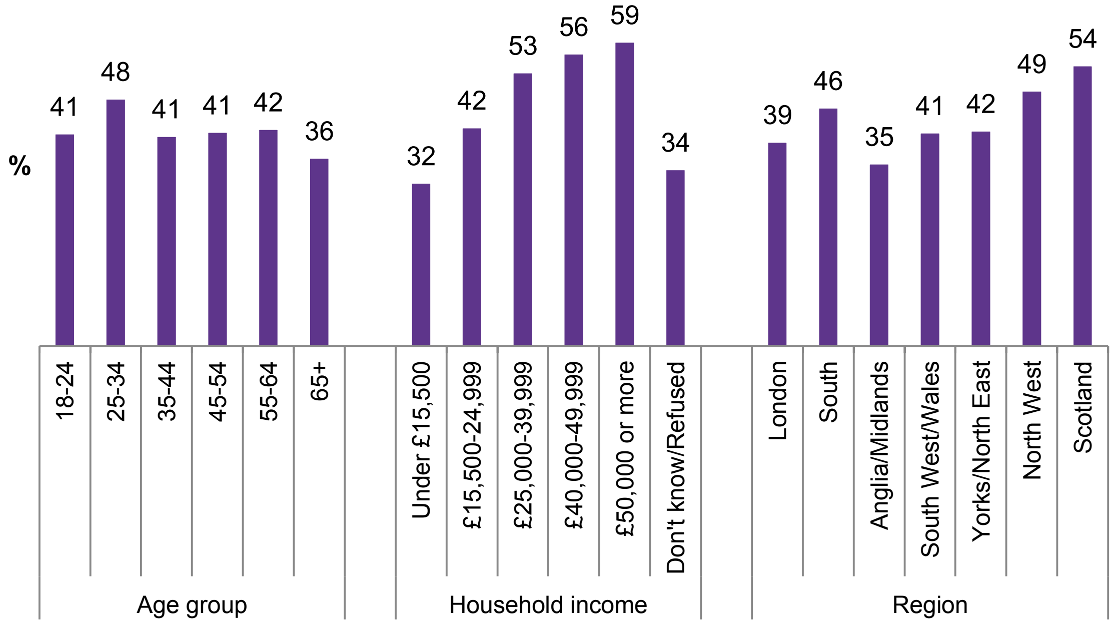
While both fast food venues and gourmet burger bars appeal more strongly to 16-34s than older cohorts, pubs attract a wider range of patrons. Visits to eat in at a pub at least once a month only dip among the over-65s. The same is apparent by income, visits at least once a month only dipping among those in households earning less than £25,000. The North /Scotland shows the highest likelihood to visit pubs to dine in at least monthly, perhaps reflecting the fact that a wider range of dining venues are available in London and the South.

The competition from pubs continues to put pressure on the gourmet burger bars to differentiate their offering from pub burgers. While their more comprehensive product range goes some way to provide this USP, there is arguably pressure on the specialists to seek out ways to set themselves apart.

FIGURE 10: VISITING A PUB TO EAT IN, AT LEAST ONCE A MONTH, BY AGE GROUP, GROSS HOUSEHOLDS INCOME AND REGION, MARCH 2015

""Thinking about going to the pub or bar, please tell me how frequently, if at all, you normally visit a pub to EAT in?"

Base: 1,965 adults aged 18+



SOURCE: IPSOS MORI/MINTEL

[10] "Pub Catering – UK", *Mintel*, May 2015
[11] "Pub Catering – UK", *Mintel*, May 2015

Other fast casual venues

Burgers at barbecue venues

Gourmet burger venues also face competition from barbecue and American style restaurants where burgers are part of the cuisine, typically featuring on the menu at similar price points. The service formats and a casual dining experience also put them in close competition with gourmet burger bars. That barbecue-style venues often position themselves as specialists in meat can mean these venues attract a customer used to meat dishes not being cooked to well-done.

For example, TGI Fridays features seven items on the burger section of its menu, which are said to be "freshly grilled to order" and priced at central London venues from £9.99 upwards. The chain was acquired by private equity firm Electra Partners in late 2014, and was described by the chain as *"capable of supporting our growth ambitions"* as it looks to grow share of the UK market.

Category blurring is also apparent here. For example, the London-based Meat & Shake chain moved from a burger-led to a more smokehouse-based format in May 2015, reportedly to 'differentiate itself' in 'a saturated burger market'. Meanwhile, Meat Liquor's co-founder Scott Collins has described the brand as *"not a burger restaurant or a barbecue place"*.

Where operators adopt a more diverse offering in response to changing consumer tastes, burgers will face a challenge to defend their place on the menu, and indeed on the plate. Nonetheless, American-style and barbecue venues appear to be benefiting from the Americana trend in foodservice. Expansion by such venues should bolster the reach of gourmet-style burgers.

FIGURE 11: SELECTED BARBECUE AND AMERICAN STYLE RESTAURANT CHAINS, OUTLET NUMBERS AND EXPANSION PLANS, AUGUST 2015

	Outlets	UK Expansion Plans
TGI Friday's	69	70th site in H1 2016. Reported openings lined up for Reading, Staines and Stevenage.
Ed's Easy Diner	42	Plans to open 19 diners in the year to September 2015 and a further five by December to reach 55. Plans to reach over 100 units by September 2018.
Hawksmoor	6	
Red's True Barbecue	5	Secured £5m of investment to fund expansion in May 2015, its focus "remains to open 20 sites within five years."
Goodman	3	
The Blues Kitchen	2	Due to open a new site in Brixton, South London in in autumn 2015.
Red Dog Saloon	2	Red Dog Restaurants is reportedly due to open in Soho in autumn 2015 and is in talks to open at Southampton's West Quay and in Lakeside, Essex.

SOURCE: COMPANY ACCOUNTS AND WEBSITES/TRADE PRESS/MINTEL

Burgers at mainstream venues

Burgers have become a menu staple at venues outside just gourmet burger bars and pubs, even appearing at Italian restaurants like Prezzo and Bella Italia, as well as the French-style Café Rouge. The price points again suggest that the burger offering is pitched as on a par with the gourmet burger chains, Prezzo's burger priced at £11.65 [12] at the time of writing.

Burger as a product relies on relatively low-cost ingredients, and the simple core product customised with toppings translates to lower skill requirements for kitchen staff as well as for speed of preparation. Combined, these make burgers an appealing proposition also for non-specialist operators.

[12] http://www.prezzorestaurants.co.uk/main-menu - 29th October 2015

Evidencing the burger trend's mainstream status, 14% of beef burgers eaters had eaten these from restaurants other than pubs, fast food and gourmet burger venues in the three months to October 2014 (see Beef Burger Foodservice Consumer Profile).

Competition from other fast casual concepts

Longer term, the ongoing development of the UK foodservice market poses all established cuisine types with the challenge of holding their ground against the latest trends. For example, following the growth of gourmet burgers, recent years have seen burrito venues gain ground in London. These match some of the strengths of burgers, such as the fast casual positioning of venues and affordable prices, as well as the high potential for customisation of the dish.

48% of respondents who had dined out in the three months to October 2015 agree with the statement "I'm always looking for new dishes to try"[13], evidence of the relentless demand for newness that the market faces. The flexibility that the use of different toppings, sauces and bread types lends to burgers will go some way to allow gourmet burger bars to refresh their offering and latch onto changing trends.

Conclusions

Gourmet burger bars have from their inception focused on a positioning differentiated from fast food venues. The higher price points, table service and freshly prepared and customisable dishes contribute to this.

As such, the venues attract a different customer profile and are used for different dining occasions, meaning that the broader fast food burger market does not lend itself as a basis for projections of the performance of the gourmet burger bar market. There is some overlap in customer bases, though, and the gourmet burger bar market should benefit from consumers trading up from standard fast food outlets as real incomes grow.

As McDonald's looks to respond to growing competition, it launched a table service pilot in 2015, including customisable burgers, and a premium range. The idea of gourmet burgers at fast food chains resonates with diners. The initiative should help to curb switching up as incomes rise to outlets serving risky burgers and prompt higher spend at fast food outlets instead, if rolled out.

The picture of potential channels of distribution of risky channels is complicated by the number of other foodservice businesses that serve thicker burgers that could pose a food safety risk if served rare. Crucially, the main selling points of gourmet burger bars (customisation, thicker patties, a wider range of toppings) have mainstream appeal well beyond the current gourmet burger users.

Most leading pub groups feature burgers on their menu often with similar price points to gourmet burger bars. Pubs' widespread presence, able to trade in locations where specialists would struggle, means they pose substantial competition to gourmet burger venues and a significant potential channel for thicker burgers. Depending on their cooking policies this could, in turn, translate into greater sales of risky burgers.

Gourmet-style burgers have now also become a menu staple at a wide variety of restaurants, even Italian-style venues. They are also part of the cuisine at barbecue and American style restaurants. While this means thicker burgers are currently widespread, burgers at such venues are under a constant challenge to defend their place on the menu as operators response to changing consumer tastes.

[13] "Menu Flavours – UK". *Mintel*, February 2016. Data from upcoming report

Longer term, the ongoing development of the UK foodservice market poses established cuisine types with the challenge of holding their ground against the latest trends, as half of diners say that they are always looking for new dishes to try.

Gourmet Burger Bars - Customer Profile

Introduction

In this section we discuss the public's current usage of gourmet burger restaurants, in terms of:

1) overall usage of gourmet burger venues compared to other chicken and burger restaurants; and

2) the demographic groups that stand out as the most likely users.

The data in this section draws from consumer research conducted for *"Burger and Chicken Restaurants", Mintel, August 2015*, commissioned by Mintel. Research was carried out by Lightspeed GMI among 2,000 internet users aged 16+ in May 2015. Details of the survey and demographic breakdowns are provided in the appendix.

Overall usage of gourmet burger bars

Among all survey respondents, the majority (65%) of participants stated that they had eaten in or bought a takeaway from a fast food outlet /restaurant in the three months to May 2015. Around half (51%) of participants had visited a burger restaurant. However, only 5% had visited a gourmet burger bar, such as Gourmet Burger Kitchen or Haché.

The high overall usage of burger bars reflects the large fast food chains' affordability compared to other dining out sectors, their long-established presence in the UK and the extensive national coverage of their store estates. For example, McDonald's and KFC together had some 1,749 outlets in total as at July 2015.

By comparison, gourmet burger bars' low penetration is a function of the limited store estates, discussed in the Competitive landscape section, and their higher price points. The latter is reflected in usage being skewed towards higher income households, as discussed below.

There is still considerable scope for expansion in the market. Even a relatively small shift from mainstream fast food outlets to gourmet burger bars would lead to a sizeable expansion in the customer base.

FIGURE 12: FAST FOOD OUTLET/RESTAURANT USAGE, MAY 2015

"Which, if any, of the following fast food outlets/restaurants have you eaten in or bought a takeaway from in the last 3 months?"

Base: 2,000 internet users aged 16+

	All %
Any fast food restaurant	65
Any burger restaurant	51
Any chicken restaurant	37
McDonald's	43
KFC	28
Subway	22
Burger King	17
Nando's	13
Gourmet burger bar (eg Gourmet Burger Kitchen, Haché)	5
Rotisserie chicken restaurant (eg Chicken Shop)	2

Other chicken outlet (eg Southern Fried Chicken, Chicken Cottage, Favourite Fried Chicken)	7
Other burger outlet (eg Wimpy)	3
I have not eaten in or bought a takeaway from fast food outlets/restaurants in the last 3 months	35

SOURCE: LIGHTSPEED GMI/MINTEL

Key demographic groups of gourmet burger bar users

Age

Usage of gourmet burger bars shows no significant difference by gender, in line with overall burger restaurant usage. Similarly in line with the latter, younger cohorts are more likely than older consumers to state that they have visited gourmet burger bars in the three months to May 2015. While 10% of 16-34-year-olds report having visited these venues, this falls to just 2% among over-45s.

That usage falls sharply among the older cohorts is reflexive of their generally dining out less often than the younger age groups[14].

They are also more likely to cite special occasions as one of their main reasons for dining out. 54% of over-45s reference these compared to 41% of 16-34s[15], this focus also likely to dampen the appeal of casual venues like gourmet burger bars.

In light of this, the 4% growth in the number of 15-34 year-olds over 2010-15 should have helped to fuel growth in the market. That no further growth is predicted in this age group over the 2015-20 period therefore suggests the absence of a previous growth driver.

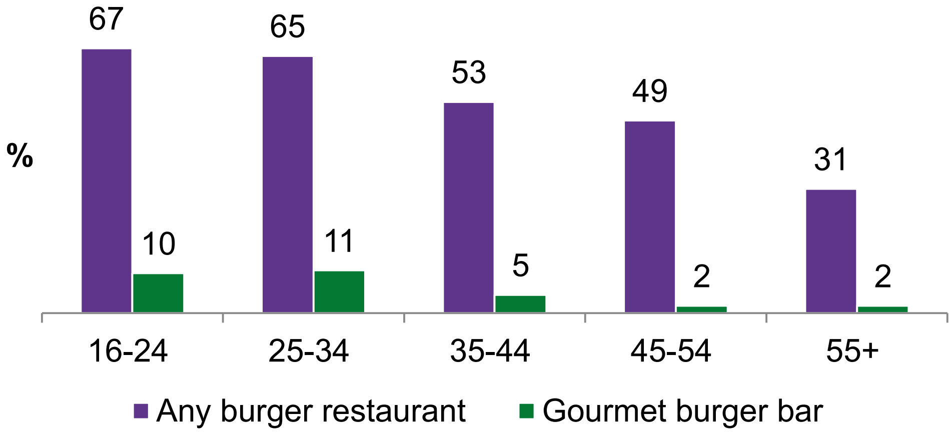
However, the scale of impact will depend in part on the ability of the market to retain current users as they age. While it seems unlikely that established users would trade down to fast food burger venues as they age, they may trade up to less casual formats. The overall fall in dining out frequency with age is also likely to see fewer visits to gourmet burger bars, among other venues.

FIGURE 13: BURGER RESTAURANT USAGE AND GOURMET BURGER BAR USAGE, BY AGE GROUP, MAY 2015

> *"Which, if any, of the following fast food outlets/restaurants have you eaten in or bought a takeaway from in the last 3 months?"*

Base: 2,000 internet users aged 16+

[14] "Menu Flavours - UK". *Mintel*, February 2015
[15] "Eating Out Review - UK". *Mintel*, June 2014



SOURCE: LIGHTSPEED GMI/MINTEL

Income

Household income is a key predictor of gourmet burger bar usage in the three months to May 2015. While only 4% of respondents in households with a gross annual household income of less than £50,000 report having visited these venues, this rises to 12% among higher income households. This in contrast to burger bars as a whole, which enjoy consistent penetration among all households earning more than £15,500.

That usage of gourmet burger bars rises sharply among wealthier households, while that of burger bars overall does not, indicates that the noticeably higher prices of the former are a barrier to consumers. For example, the leading chain, Gourmet Burger Kitchen prices its standard sized burgers from £6.85 upwards[16] and Byron from £6.75 upwards[17]. By comparison, McDonald's long-standing 'saver menu' features burgers starting at £0.99.

Related to usage rising with incomes, gourmet burger bar usage is also higher among the AB socio-economic group (at 9%) than C1C2s (6%) or DEs (2%). Similarly, respondents who describe their financial situation as 'healthy' or 'OK' are more likely (6.2%) to use gourmet burger bars than those who see their financial situation as 'tight' or worse (3.5%).

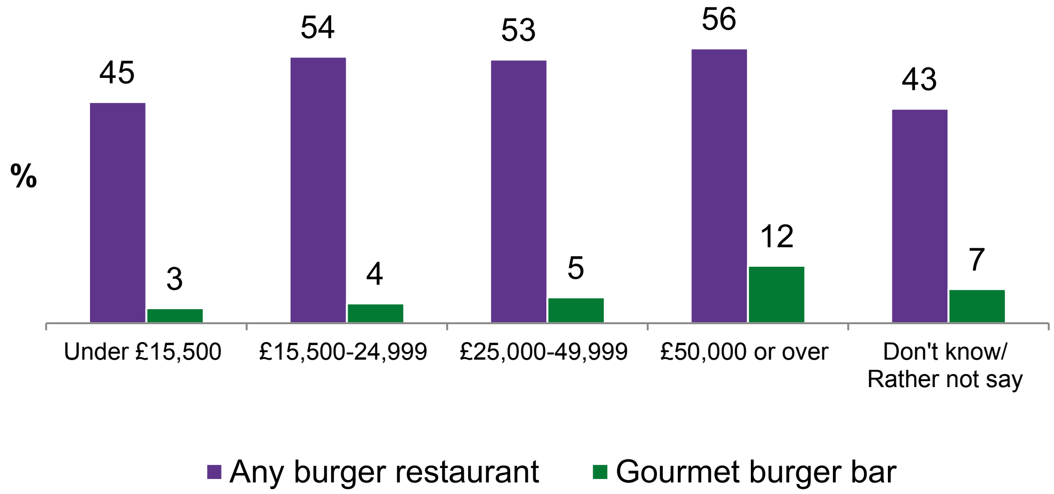
This usage pattern suggests that the expected rise in real household incomes over the next five years should fuel growth in user numbers at gourmet burger bars. While it is also likely to some extent facilitate trading up from gourmet burger bars by current users, in light of the decidedly low current levels of usage, on balance, the market is likely to gain users.

FIGURE 14: BURGER RESTAURANT USAGE AND GOURMET BURGER BAR USAGE, BY GROSS HOUSEHOLD ANNUAL INCOME, MAY 2015

"Which, if any, of the following fast food outlets/restaurants have you eaten in or bought a takeaway from in the last 3 months?"

[16] http://www.gbk.co.uk – retrieved 23rd October 2015.
[17] https://www.byronhamburgers.com – retrieved 23rd October 2015.

Base: 2,000 internet users aged 16+



SOURCE: LIGHTSPEED GMI/MINTEL

Location

Respondents in London are more likely than those in many other regions to state that they have visited gourmet burger bars in the three months to May 2015. Usage is also higher among those living in an urban location (8%) than those in a suburban (4%) or village/rural locations (3%).

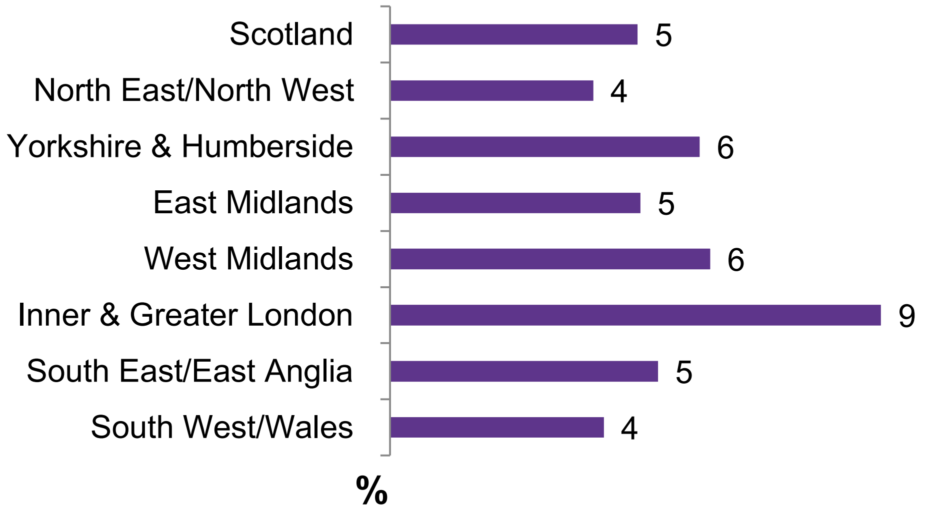
This is in line with Londoners and urban dwellers standing out similarly in terms of frequency of dining, which partly reflects the younger demographic profile of both[18]. However, it is also indicative of the geographical coverage of gourmet burger bars. As discussed in the Competitive landscape section, The Gourmet Burger Kitchen and Byron are the only leading chains with a well-established presence outside London. However, even then their focus remains firmly in major urban centres.

That consumers' limited access to gourmet burger bars poses a barrier to usage suggests that the expected further outlet expansion of many of the brands should continue to drive up penetration. However, this depends in part on brands continuing to target new areas, as opposed to new brands entering the high-potential locations already serviced by their competitors.

[18] "Menu Flavours". *Mintel*, February 2015

FIGURE 15: GOURMET BURGER BAR USAGE, BY REGION, MAY 2015

Base: 2,000 internet users aged 16+



SOURCE: LIGHTSPEED GMI/MINTEL

Conclusions

Current penetration of gourmet burger bars is decidedly low, at just 5% of population. 16-34-year-olds, higher income households and ABs, and Londoners and urbanites come across as the most likely users.

Although the chains are positioned as an affordable option in the overall dining out market, their price points appear to nonetheless curb usage, in light of the user profile. As such, the predicted rise in real disposable incomes going forward should on balance bring more users to the market.

The user profile also points to the limited geographical presence of gourmet burger bars as a barrier to usage, suggesting the chains' planned expansion should fuel a rise in penetration. The predicted lack of growth in the 16-34 age group meanwhile will see a previous growth driver lacking over the 2015-20 period.

Apart from these factors, as discussed in the section Competing and Alternative Channels, the dining experience at most gourmet burger bars is more closely on a par with a traditional restaurant meal than a fast food meal. While this makes them better able to target leisure occasions, it lends itself less readily to convenience-led or time-pressed occasions. Gourmet burger bars however share the 'casual' image of fast food outlets, reflected in the young user profile.

Beef Burger Foodservice Consumer Profile

Introduction

In this section we discuss the public's current consumption of beef burgers at foodservice venues, in terms of:

1) beef burger uptake in the foodservice channel and demographic profile of users;

2) the foodservice channels used to buy beef burgers from;

3) the cooking preference for a 'perfect' beef burger and the reasons for those preferences;

4) penetration of medium or medium rare beef burgers and the demographic profile of users.

The data in this section draws from consumer research commissioned by Mintel. Research was carried out by Lightspeed GMI among internet users aged 16+ in October-November 2015.

The survey was completed by 2,000 respondents, of who 915 had eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months.

The questions on venues from which diners have eaten beef burgers, preferred cooking level of a beef burger, and whether they had eaten medium or rare beef burgers from foodservice venues in the last two weeks were only put to people who had eaten burgers in the last three months.

Based on how the survey respondents reported preferring to have their 'perfect' beef burger cooked, they were then asked to type in a response as to why they prefer this level of cooking, to gauge the drivers behind their choice. The open-ended responses were grouped by theme.

Details of the survey and demographic breakdowns are provided in the appendix.

Uptake of beef burgers in foodservice

Among all survey respondents, 46% of participants stated that they had eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the three months to October 2015. This compares to 90% of consumers having eaten out or ordered a takeaway/home delivery from any foodservice venue in the three months to October 2015[19].

That around half of diners are eating beef burgers in the foodservice industry is evidence of the mainstream popularity of the dish, and the role it has established as a menu staple. This has been facilitated by beef burgers being adopted on the menu across a wide range of venues and price points from fast food chains to high-end restaurants. The relatively low cost of ingredients and ease of preparation translate to strong margins even at affordable prices, bolstering its appeal for operators.

[19] "Menu Flavours – UK". *Mintel*, February 2016. Data from upcoming report

Uptake in foodservice - demographics

Uptake of beef burgers rises to 57% among 16-34s. It also stands above average among residents of Inner & Greater London (60%) and among urban dwellers (53%). Respondents in households earning £50,000 or more and A socio-economic group also report higher than average uptake at 59% and 58% respectively. These patterns are in line with the above groups having the highest frequency of dining out generally[20].

Uptake is also considerably higher among parents of children aged 12 or under (65%) than those with older children, or none in the household. This appears to stem in part from the high use of burger fast food outlets by these groups, likely to appeal thanks to their family-friendly and affordable positioning.

FIGURE 16: BEEF BURGER UPTAKE AT FOODSERVICE VENUES IN THE PAST THREE MONTHS, BY SELECTED DEMOGRAPHICS, OCTOBER 2015

"Have you eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months?"

Base: 2,000 internet users aged 16+

	Sample size	% who have eaten burgers at a foodservice venue
Total	2,000	46
Gender		
Male	997	50
Female	1,003	42
Age		
16-34	707	57
35-44	368	52
45-64	658	41
65+	267	19
Region		
Scotland	171	37
North East	84*	42
North West	228	47
Yorkshire & Humberside	171	41
East Midlands	148	43
West Midlands	182	51
Inner & Greater London	270	60
South East/East Anglia	474	44
South West	173	39
Wales	99*	42
Location		
Urban location (ie living in a town/city)	783	53
Suburban location (ie close to town/city but living outside a town/city)	826	42
Village/rural location	391	38
Socio-economic group		

[20] "Menu Flavours – UK". *Mintel*, February 2016. Data from upcoming report

A	111	59
B	335	45
C1	618	46
C2	418	50
D	264	47
E	254	33
Gross annual household income		
Under £15,500	490	40
£15,500 - 24,999	399	46
£25,000 - 49,999	648	48
£50,000 or over	259	58
Don't know/Rather not say	204	37
Children living in the household		
Aged 5 and under	200	66
Aged 6-12	278	65
Aged 13-17	292	55
Aged 13-15	182	59
Aged 16-17	167	51
Aged 18+	261	45
I am not the parent/guardian of any children in my household	1,249	40

* Small sub-sample (75-100)
SOURCE: LIGHTSPEED GMI/MINTEL

Beef burgers - venues

Fast food outlets are by far the most common venues for eating beef burgers. Among survey respondents who had eaten beef burgers in the three months to October 2015, 71% stated that they had eaten a beef burger from a fast food venue. The fast food venues' low prices and extensive geographical presence contribute to their large customer base. The role of fast food venues as competition to gourmet burger bars is discussed in more detail in the section Competing and Alternative Channels.

27% and 18% of beef burger eaters had eaten these from pubs and gourmet burger outlets respectively. These venues have been identified as potential channels for risky burgers, as discussed in the sections Competing and Alternative Channels and Gourmet Burger Competitive Landscape. Evidencing the burger trend's mainstream status, 14% of beef burgers eaters had eaten these from other restaurants.

Venues – demographics

Beef burger eaters aged 26-35s are more likely to have eaten these at a pub than those aged 36 or over. This is in line with under-35s generally visiting pubs more frequently to eat in than the over-35s.[21] However, age is the only demographic attribute where a specific group stands out for higher than average for beef burger usage at pubs.

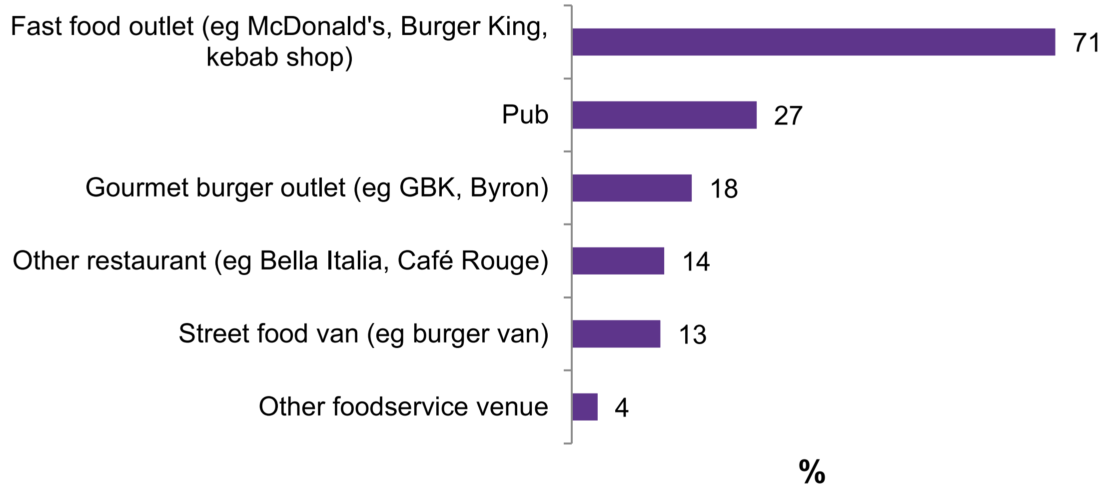
Meanwhile, gourmet burger bars attract higher usage among beef burger eaters in the AB socio-economic group than others, and among those in households earning £50,000 or more. This is in line with the venues' overall user profile, and is a reflection of their relatively high price points as well as of these groups' higher than average frequency of dining out.

[21] "Menu Flavours – UK". *Mintel*, February 2016. Data from upcoming report.

FIGURE 17: VENUES FROM WHICH DINERS HAVE EATEN BEEF BURGERS IN THE PAST THREE MONTHS, OCTOBER 2015

"From which of the following venues have you eaten beef burgers in the last 3 months?"

Base: 915 internet users 16+ who have eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months



SOURCE: LIGHTSPEED GMI/MINTEL

Beef burgers – preferred cooking level

Beef burgers are most widely preferred well-done by survey respondents who had eaten beef burgers in the three months to October 2015. 59% stated this was their preferred style, which should make the burgers risk-free in the framework of this FSA consideration -.

27% stated medium and 12% cited medium-rare or rare burgers as their preference, signalling a significant pool of demand for potentially risky burgers.

Preferred cooking level - demographics

Under-45s, ABC1s and respondents with a gross household income of £50,000 or more showed the strongest preference for medium or rare burgers, among respondents who had eaten beef burgers in the three months to October 2015.

The over-45s are more likely than younger cohorts to state they are ‘extremely concerned’ about the presence of harmful bacteria in food/drink (eg E. coli, campylobacter, salmonella)[22], such concerns being likely to drive their preference for fully-cooked burgers.

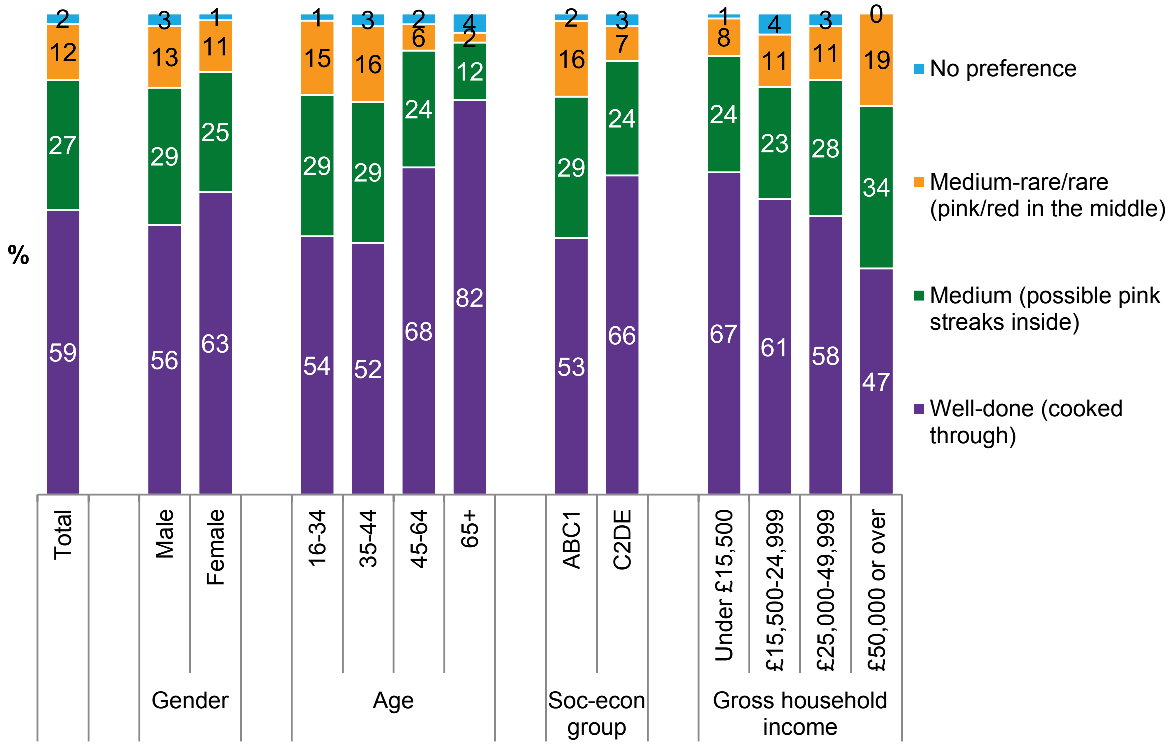
Meanwhile, the under-45s, ABs and top income households are the most likely to agree with the statement “I consider myself a "foodie"”, among respondents who had dined out or ordered a takeaway/home delivery in the three months to October 2015[23].

FIGURE 18: PREFERRED COOKING LEVEL OF A BEEF BURGER, OCTOBER 2015

"Thinking about your perfect beef burger, how would you prefer to have it cooked?"

[22] “Consumers' Food Safety Concerns – UK”. *Mintel*, May 2015
[23] “Menu Flavours – UK”. Mintel, February 2016. Data from upcoming report.

Base: 915 internet users 16+ who have eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months



SOURCE: LIGHTSPEED GMI/MINTEL

Medium/rare beef burger consumption in foodservice

26% of survey respondents who had eaten beef burgers in the three months to October 2015 state having eaten a medium or rare burger in the last two weeks. This equates to 12% of all survey respondents. Groups most likely to report doing so include 16-34-year-olds, ABC1s, urban dwellers, and those who describe their financial situation as healthy.

The former two groups are also the most likely to state that they prefer beef burgers rare, suggesting this demand is at play. However, for the other two groups, their higher than average overall frequency of dining out[24] appears to be a key driver. Simply being more likely to dine out at least once a fortnight contributes to their being more likely to have eaten burgers in the last two weeks, including medium or rare ones.

FIGURE 19: EATING MEDIUM OR RARE BEEF BURGERS FROM FOODSERVICE VENUES IN THE LAST TWO WEEKS, BY AGE GROUP, LOCATION, SOCIO-ECONOMIC GROUP AND FINANCIAL SITUATION, OCTOBER 2015

"Have you eaten a medium or rare beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 2 weeks?"

Base: 915 internet users 16+ who have eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months

[24] "Menu Flavours – UK". *Mintel*, February 2016. Data from upcoming report.

* Small sub-sample (75-100)

SOURCE: LIGHTSPEED GMI/MINTEL

Reasons for preferred cooking level

Methodology

Based on how the survey respondents reported preferring to have their 'perfect' beef burger cooked, they were then asked to type in a response as to why they prefer this level of cooking, to gauge the drivers behind their choice. The open-ended responses were grouped by theme, and the results are as follows.

Readers should note that the reasons for preferences were asked with regards to well-done, medium and medium-rare burgers separately. The sample for well-done burgers is therefore 542 internet users 16+ who have eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months and prefer beef burgers well-done. The sample for medium burgers was 246 respondents and for medium-rare burger 95 respondents.

Readers should also note the implication of the relatively small sample sizes for the margin of error. For example, for a sample of 500, the margin of error for a question with a 15% level of agreement is ±3.2%. For a sample of 250, it's ±4.5% and for a sample of 100 it's ±7.1%.

Well-done burgers

Safety plays a key role in the respondents' preference for well-done beef burgers. However, taste and texture are key drivers, including disliking the juices that many associate with medium or rare burgers.

Many also made references to 'knowing it's cooked' or being put off by pink or uncooked meat. While these imply that safety is likely to be a consideration, where the reason for these preferences was not made explicit, the responses are grouped separately.

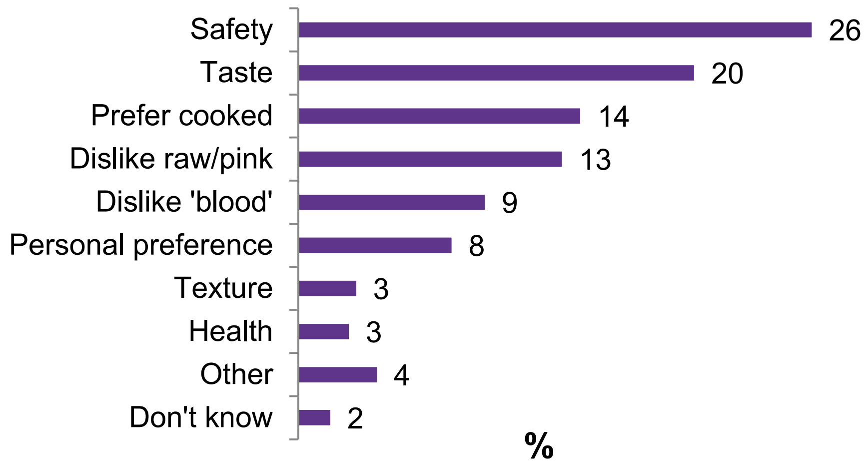
Where no further explanation was given beyond ‘it’s my personal preference’, and equivalents thereof, these responses were grouped separately, as such preferences could be driven by any of the above considerations.

That so many respondents failed to articulate the underlying reason behind their preference – whether liking burgers to be cooked, being put off by those that are not, or just referencing ‘liking’ – seems to suggest that a limited knowledge of the related food safety issues, and a reliance on established habits.

FIGURE 20: REASONS FOR PREFERRING A WELL-DONE BEEF BURGER, OCTOBER 2015

“Why do you prefer a well-done burger?” (open-ended question)

Base: 542 internet users 16+ who have eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months and prefer beef burgers well-done



SOURCE: LIGHTSPEED GMI/MINTEL

Medium burgers

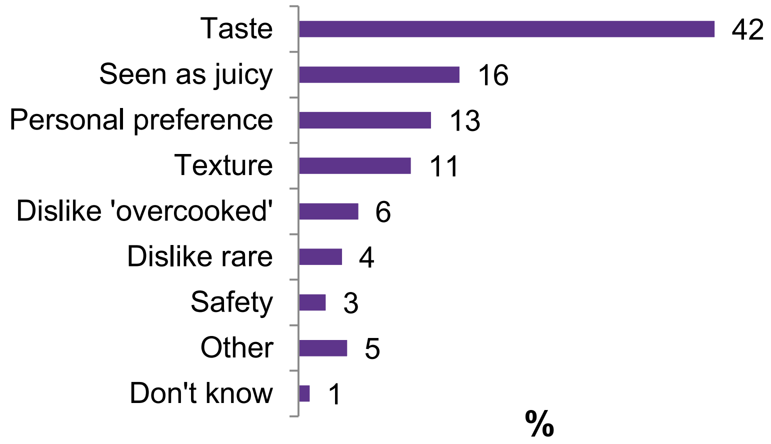
The preference for medium burgers is overwhelmingly fuelled by the eating experience being seen as better in terms of taste, texture and juiciness. A small share of respondents also identify medium burgers as a safe choice, or are put off by rare burgers, suggesting that there may be lack of awareness of the risks associated.

That demand for medium beef burgers among people who eat beef burgers stems from positive taste perceptions suggests that this positive view will be sustained. Thus, the demand for medium burgers is unlikely to be a fad, dependent on for example the burger venues promoting it.

FIGURE 21: REASONS FOR PREFERRING A MEDIUM BEEF BURGER, OCTOBER 2015

“Why do you prefer a medium burger?” (open-ended question)

Base: 246 internet users 16+ who have eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months and prefer beef burgers medium



SOURCE: LIGHTSPEED GMI/MINTEL

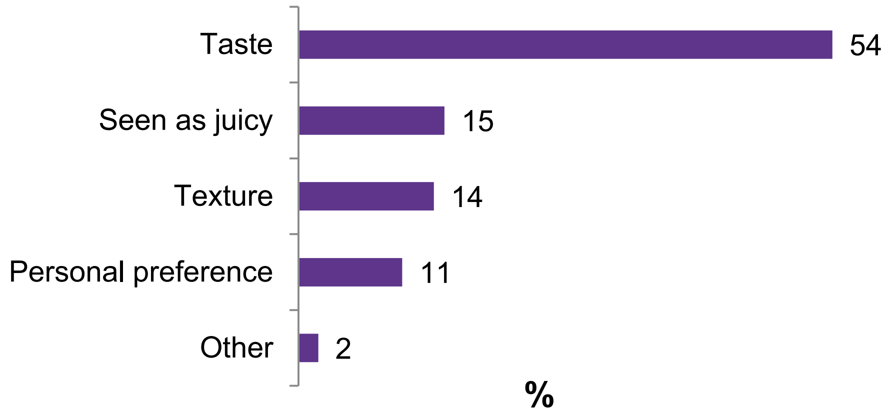
Medium-rare burgers

The same pattern is apparent for medium-rare as medium burgers, of the eating experience fuelling demand, suggesting that this interest is unlikely to wane simply with food fashions.

FIGURE 22: REASONS FOR PREFERRING A MEDIUM-RARE BEEF BURGER, OCTOBER 2015

"Why do you prefer a medium burger?" (open-ended question)

Base: 95 internet users 16+ who have eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months and prefer beef burgers medium-rare



SOURCE: LIGHTSPEED GMI/MINTEL

Conclusions

That around half of diners are eating beef burgers in the foodservice is evidence of the role it has established as a menu staple across a wide range of venues. The strong margins at affordable prices bolster its appeal for foodservice operators.

Fast food outlets are by far the most common venues for eating beef burgers. Venues identified as potential channels for risky burgers, pubs and gourmet burger bars, attract visits from 27% and 18% of beef burger eaters respectively.

59% of eaters prefer beef burgers well-done. 27% prefer medium and 12% medium-rare or rare burgers, signalling a significant pool of demand for potentially risky burgers. Preference for these is highest among demographic groups that dine out most often and that are the most likely to identify themselves as 'foodies'.

Current users' preference for medium or rare burgers is overwhelmingly fuelled by these being seen to offer a superior eating experience in terms of taste, texture and juiciness. Given that this is a view held by current burger eaters, it is likely be sustained. Therefore the demand for such cooking levels for burgers are unlikely to be just a fad, although the demand for burgers on the whole may wane.

26% of survey respondents who had eaten beef burgers in the three months to October 2015 state having eaten a medium or rare burger in the last two weeks. Groups most likely to report doing so include 16-34-year-olds, ABC1s, urban dwellers, and those who describe their financial situation as healthy.

Market Drivers

Introduction

In this section we discuss the various external trends affecting the gourmet burger bar market, including the effects of the improving household incomes, changes to the age structure of the population, and consumer trends on the market.

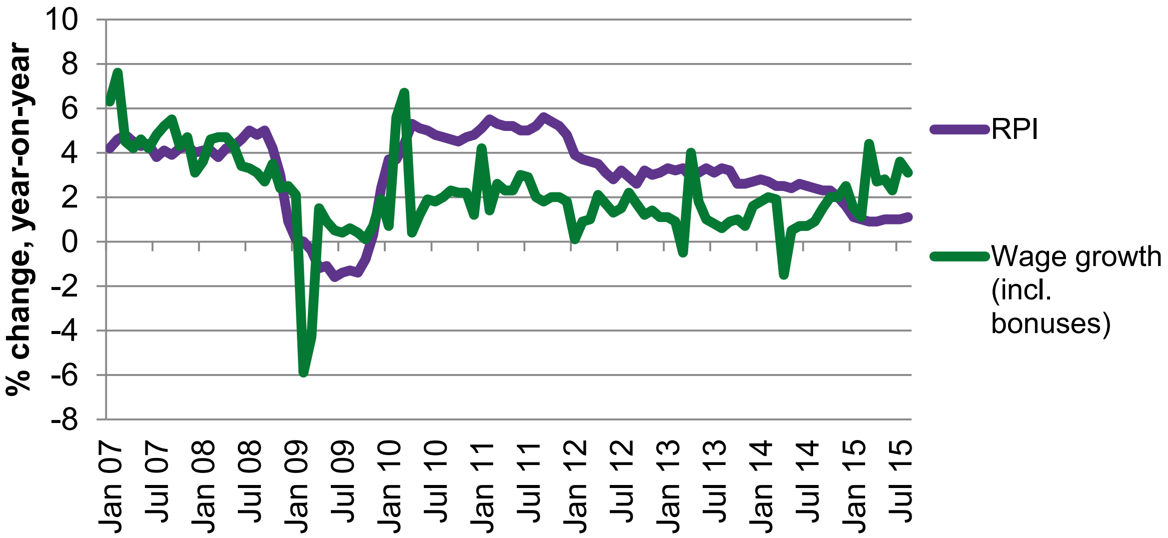
The data in this section draws from research conducted by Mintel for various foodservice and other reports, as detailed below, as well as additional research including review of leading foodservice trade press.

Rising incomes bode well for gourmet burger venues

Household income of more than £50,000 is a key predictor of higher gourmet burger bar usage, as discussed in the Consumer Profile section. Similarly, respondents who describe their financial situation as 'healthy' or 'OK' are more likely to use gourmet burger bars than those who see their financial situation as 'tight' or worse.

This indicates that the relatively high prices are a barrier to consumers. The expected rise in real household incomes over the next five years should fuel growth in user numbers at gourmet burger bars. While it is also likely to some extent facilitate trading up from these venues by current users, in light of the low current levels of usage, on balance, the market is likely to gain users.

FIGURE 23: AVERAGE WEEKLY EARNINGS AND RPI, YEAR-ON-YEAR % CHANGE, JANUARY 2007-AUGUST 2015



SOURCE: OFFICE FOR NATIONAL STATISTICS/MINTEL

GBK enjoys a stronger aspirational image than fast food chains

Brand research methodology

Mintel regularly conducts research into consumer attitudes towards brands, published in the Brand Research sections of category reports. A selection of leading brands is featured in each product category. Brands are evaluated on a number of areas including usage, commitment, dynamism, differentiation, satisfaction, image, recommendation and attitudes. The research is typically conducted among a nationally representative sample of some 2,000 internet users aged 16+.

The below table features a selection of brand image attributes in relation to the leading fast food burger chains, McDonald’s and Burger King, and the leading gourmet burger chain by store number, the Gourmet Burger Kitchen. Attitudes towards each were surveyed among internet users aged 16+ who reported having heard of the brand and expressed an opinion.

GBK enjoys stronger premium associations

Comparing the attitudes of the respondents to the leading fast food burger brands and the leading gourmet burger bar further underlines the fact that these are seen in a very different light. The former for example stand out for their strong association with convenience and family. The latter meanwhile enjoys stronger associations with qualities like cool, authentic and special.

The differences in image further suggest that the formats are not currently seen by consumers as fulfilling the same function, and therefore, as interchangeable, as discussed in section Competing and Alternative Channels. The performance of the fast food burger market therefore does not lend itself as a basis for projections of the gourmet burger bar market.

The stronger associations of GBK with positive premium attributes like cool, authentic and special and weaker associations with negative traits like tacky or samey, further suggest that it has a stronger aspirational image than the fast food burger brands. As such, it should benefit from trading up as consumer spending regains momentum.

FIGURE 24: BRAND IMAGE – MICRO IMAGE, MCDONALD'S, BURGER KING AND GBK, JUNE 2015

"*Now, from the list below, please select all words that describe your image of each brand*"

	McDonald's	Burger King	Gourmet Burger Kitchen
Base: internet users aged 16+ who have heard of a brand and expressed an opinion	1,979	1,958	1,053
	%	%	%
Exciting	11	8	14
Welcoming	27	20	22
Cool	12	9	20
Authentic	12	12	24
Convenient	44	33	9
Efficient	21	14	12
Family	42	30	17
Friendly	31	22	21
Healthy	4	3	11
Traditional	15	13	9
Responsive	9	6	7
Special	8	7	24
Samey	16	18	4
Impersonal	13	11	5
Tacky	19	15	3
None of these	9	17	27

Data from "Burger and Chicken Restaurants", *Mintel*, August 2015

SOURCE: LIGHTSPEED GMI/MINTEL

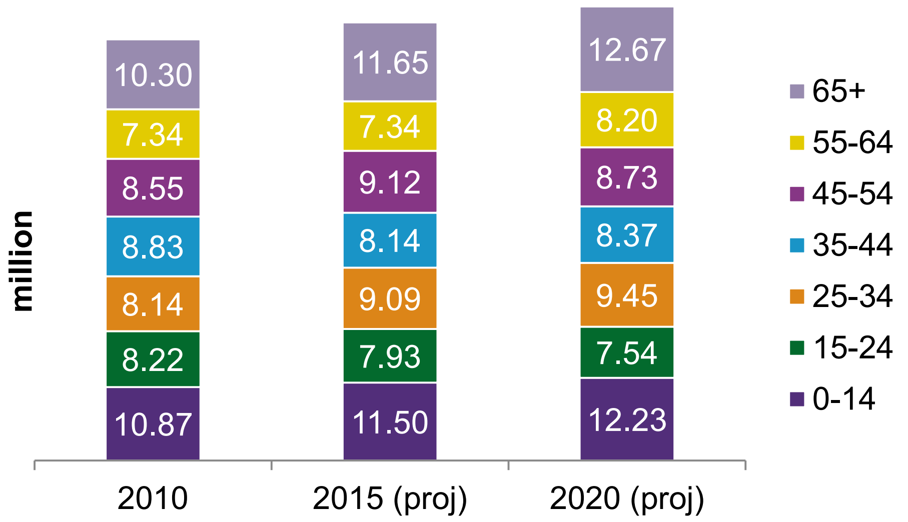
Lack of growth among 15-34s

Younger cohorts are more likely than older consumers to state that they have visited gourmet burger bars in the three months to May 2015, as discussed in the Consumer Profile section. In light of this, the 4% growth in the number of 15-34 year-olds over 2010-15 should have helped to fuel growth in the market. That no further growth is predicted in this age group over the 2015-20 period suggests the absence of a previous growth driver, which stands to dampen growth compared to the previous period.

The ability of the market to retain current users as they age will affect the scale of impact. While it seems unlikely that established users would trade down to fast food burger venues as they age, they may trade up to less casual formats or to other cuisine types with improving finances. The overall fall in dining out frequency with age is also likely to see fewer visits to gourmet burger bars from the current core users as they age, as well as to other venues.

If the current 16-34-year-olds retain their gourmet burger bar usage as they reach the family lifestage, this could see future cohorts grow up with the gourmet burger rather than fast food burger established as the benchmark in this market.

FIGURE 25: TRENDS IN THE AGE STRUCTURE OF THE UK POPULATION, 2010-20



SOURCE: ONS/MINTEL

Gourmet burgers widely seen as healthier than fast food

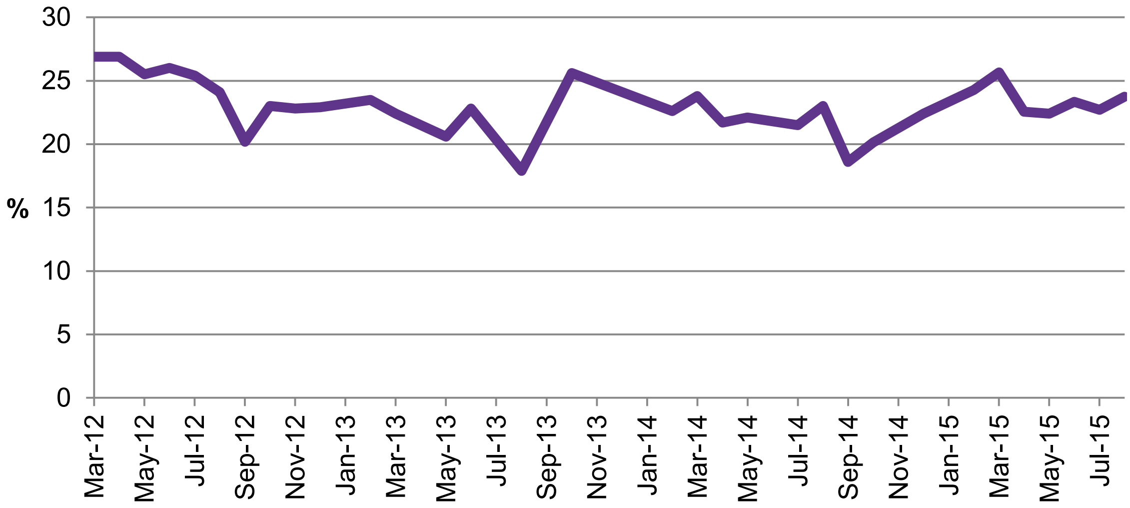
Consumer research conducted for *"Burger and Chicken Restaurants", Mintel, August 2015*, found that among survey respondents who had eaten in or bought a takeaway from a fast food restaurant in the three months to May 2015, 39% agreed that gourmet burgers (eg from Gourmet Burger Kitchen) are better for you than burgers from a fast food restaurant.

Only 24% of internet users aged 16+ were reported to "eat what I like and don't worry too much about healthy my diet is" in Mintel's exclusive consumer research at August 2015. That so few respondents pay no heed to the healthiness of their food choices suggests that such issues matter for most. The perception of gourmet burgers as the healthier choice should therefore bode well for the gourmet burger segment.

The interest in healthiness is a long-established trend and the issue in its various guises is expected to remain on the consumer radar also going forward.

FIGURE 26: AGREEMENT WITH THE STATEMENT "I EAT WHAT I LIKE AND DON'T WORRY TOO MUCH ABOUT HOW HEALTHY MY DIET IS", MARCH 2012-AUGUST 2015

Base: 1,500-2,000 internet users aged 16+



SOURCE: LIGHTSPEED GMI/MINTEL

Diners look for indulgence on special occasions

In the consumer survey for Mintel's Eating Out: The Decision Making Process, July 2014, respondents who dine out were asked what type of dining experience they typically look for on special occasions. These factors are likely to gain importance in consumers' foodservice choices as real incomes rise.

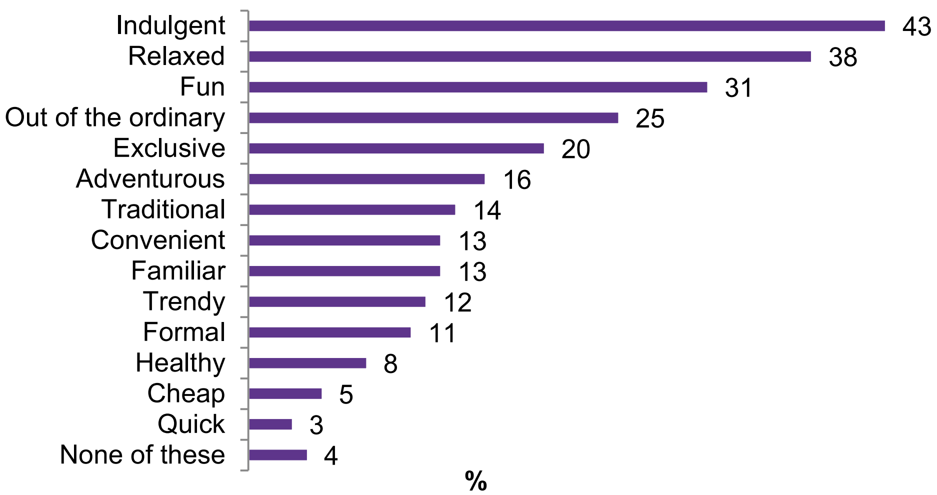
The most widely sought attributes included indulgent (43% of respondents), relaxed (38%), and fun (31%). Out of the ordinary and adventurous stood further down the list, cited by 25% and 16% of respondents respectively.

The demand for indulgence is something gourmet burgers should be well-placed to capitalise on.

FIGURE 27: CONSUMER EXPECTATIONS OF DINING OUT OCCASIONS, APRIL 2014

"Thinking about eating out for a special occasion (eg birthday), which of the following words would best describe the type of dining experience that you typically look for? Please select all that apply."

Base: 1,683 internet users aged 16+ who have eaten in a restaurant or fast food outlet in the past three months



Data from "Eating Out: The Decision Making Process", *Mintel*, July 2014

SOURCE: LIGHTSPEED GMI/MINTEL

Three in ten think restaurants should have the option to cook burgers rare

Consumer research conducted for "Burger and Chicken Restaurants", *Mintel*, August 2015, found that among survey respondents who had eaten in or bought a takeaway from a fast food restaurant in the three months to May 2015, 30% agreed that burger restaurants should have the option to cook beef burgers rare.

Agreement peaks among fast food diners aged 16-34 and increases with household income, matching the profile of most frequent diners and the profile of gourmet burger bar users.

Agreement is likely to be as much about a belief in freedom of choice as it is about a personal preference for rare burgers, but the level of agreement highlights the political/public opinion challenges associated with any attempt to mandate that burgers are served well-done.

That a third of respondents actively disagree with the statement, however, suggests that many have reservations about burgers that are served rare. Steps to ensure that diners are informed about their choices at the restaurant should resonate among this group.

The high-margin, quick turnaround dish appeals to operators

Across the UK foodservice market, property prices are a significant factor for operators, with competition pushing rents up in key locations, also discussed in the section Gourmet Burger Bar Market Characteristics. This has to some extent played in favour of fast casual formats like burger restaurants, which allow for quick turnaround on the tables.

Burger as a product relies on relatively low-cost ingredients, and the simple core product customised with toppings translates to lower skill requirements for kitchen staff as well as for speed of preparation. Combined, these make burgers cheap to produce compared to many cuisines or dish types, translating to high margins and making this an appealing proposition for the operators.

The ease of preparation and low skill requirements have also facilitated the uptake of gourmet-style burgers by a wide array of non-specialist venues, creating a wider range of distribution channels for potential risky burgers.

Changing foodservice trends

The fast pace of development of the UK foodservice market poses all established cuisine types with the challenge of holding their ground against the latest trends. The same is true of gourmet burgers. 48% of respondents who had dined out in the three months to October 2015 agree with the statement "I'm always looking for new dishes to try"[25], providing evidence of the relentless demand for newness.

[25] "Menu Flavours – UK". *Mintel*, February 2016. Data from upcoming report

The flexibility that the use of different toppings, sauces and bread types lends to burgers will go some way to allow gourmet burger bars to refresh their offering and latch onto new flavour trends. This has its limitations, with food trends consisting of much more than just flavour trends, with for example burrito bars gaining prevalence in recent years. There also remains marked untapped interest in ethnic cuisines among UK diners[26].

Comparison to the US market

Mintel's US research shows that there are a number of parallels between the UK and the US beef burger market. However, the US market provides limited learnings for the UK in terms of future developments.

Customisation of burgers is identified as a new trend within the US foodservice industry, but is already established in the UK. The US foodservice market has seen a growing number of casual dining establishments adopt customisation, a trend which is also apparent in the UK in McDonald's latest initiatives as well as in other foodservice segments such as burrito bars. This aspect is helping other operators compete with the gourmet burger market.

The US analysis suggests that "chef first" restaurants have adopted a default temperature of serving beef burgers medium or even medium-rare. These restaurants position the chef as the leader of the meal rather than the customer dictating the meal, the serving temperature chosen because the chef believes that is the "correct" temperature at which to eat the burger.

This is again an approach seen in the UK already, as discussed in the Gourmet Burger Bar Market Characteristics section, though venues here will typically temper the recommendation by stating that they will cook burgers to customer preference.

Conclusions

Higher household income and a secure financial situation are key predictors of gourmet burger bar use. The expected rise in real household incomes over the next five years will facilitate trading up from gourmet burger specialists by some current users, but on balance, the market is likely to gain users.

Younger cohorts are more likely than older consumers to have visited gourmet burger bars. The 4% growth in 15-34 year-olds over 2010-15 should have benefited the market, but no further growth is predicted in this age group over 2015-20. While established users are unlikely to trade down to fast food burger venues as they age, they may trade up to less casual formats.

Gourmet burgers are widely seen as better for you than burgers from a fast food restaurant. The interest in healthiness is a long-established trend and expected to endure. The perception of gourmet burgers as the healthier choice – if retained - should therefore bode well for the gourmet burger segment.

Opinions are divided on whether burger restaurants should have the option to cook beef burgers rare, continuing to highlight the thorny issue, and the importance of customer buy-in to address the potential risk posed by beef burgers.

[26] "Ethnic Restaurants and Takeaways – UK." *Mintel*, February 2015

Conclusions

Gourmet burger bar market remains small and fragmented

Gourmet burgers are not synonymous with burgers not being fully cooked. However, the typically thicker beef patties and the 'connoisseur' positioning of many gourmet burger venues have led to many of the identified operators serving their burgers as pink or 'medium' as standard.

Gourmet burger bars are a recent phenomenon in the UK foodservice market. While the market is growing rapidly, it remains a small and fragmented one, only two operators reporting more than 50 outlets. The combined turnover of the only five chains large enough to be required to report their this comes to some £150 million. This compares to sales of £3.0 billion in the overall burger bar market.

Various established brands and numerous large US entrants have announced ambitious expansion plans. Where the operators are moving beyond their current, largely metropolitan, base, this will bring new consumers to the market. However, many operators are currently targeting the same key cities, the overlap dampening the growth of the market as a whole.

Various venues serve thicker burgers

Gourmet burger bars have from their inception focused on a positioning differentiated from fast food venues. While the latter is at risk of consumers trading up as real incomes grow, the former is likely to benefit. However, the idea of gourmet burgers at fast food chains resonates with diners. McDonald's initiatives in this area should help to curb switching up to outlets serving risky burgers as incomes rise, if rolled out.

The picture of potential channels of distribution of risky burgers is complicated by a number of other foodservice businesses offering thicker burgers that could be served pink or rare. The strong margins for the affordable dish bolster burgers' appeal for foodservice operators.

Most leading pub groups feature burgers on their menu at similar price points to gourmet burger bars. Pubs' widespread presence means they pose substantial competition to gourmet burger venues and a significant potential channel for risky burgers. Gourmet-style burgers have also become a menu staple at a wide variety of restaurants.

Longer term, the ongoing development of the UK foodservice market poses established cuisine types with the challenge of holding their ground against the latest trends, as half of diners are always looking for new dishes to try. As well as putting pressure on gourmet burger venues, this could see burgers lose prevalence on the menus at the various competing channels.

Gourmet burger bars attract a small young and affluent user base

The penetration of gourmet burger bars is low, at just 5% of population. 16-34-year-olds, higher income households and ABs, and Londoners and urbanites are the most likely users. Although the chains are positioned as an affordable option in the dining out market, their price points appear to curb usage. As such, the predicted rise in real disposable incomes should, on balance, bring more users to the market.

The user profile also points to the limited geographical presence of gourmet burger bars as a barrier to usage, suggesting the chains' planned expansion should fuel a rise in penetration. The predicted lack of growth in the 16-34 age group meanwhile will see a previous growth driver lacking over the 2015-20 period.

Two in five users prefer beef burgers not fully cooked

That around half of diners are eating beef burgers in foodservice is evidence of their role as a menu staple across a wide range of venues. Venues identified as potential channels for risky burgers, pubs and gourmet burger bars, attract visits from 27% and 18% of beef burger eaters respectively.

While there is an overall preference for beef burgers well-done, 39% of eaters prefer medium or rare burgers. Preference for these is highest among demographic groups that dine out most often and that are the most likely to identify themselves as 'foodies'.

This preference is overwhelmingly fuelled by such burgers being seen to offer a superior eating experience in terms of taste, texture and juiciness. Given that this is a view held by current burger eaters, it is likely be sustained, although the demand for burgers on the whole may wane.

26% of survey respondents who had eaten beef burgers in the three months to October 2015 state having eaten a medium or rare burger in the last two weeks. Groups most likely to report doing so include 16-34-year-olds, ABC1s, urban dwellers, and those who describe their financial situation as healthy.

Market drivers

Higher household income and a secure financial situation are key predictors of gourmet burger bar use. The expected rise in real household incomes over the next five years will facilitate trading up from these venues by some current users, but on balance, the market is likely to gain users.

Younger cohorts are more likely than older consumers to have visited gourmet burger bars. The 4% growth in 15-34 year-olds over 2010-15 should have benefited the market, but no further growth is predicted in this age group over 2015-20. While established users are unlikely to trade down to fast food burger venues as they age, they may trade up to less casual formats.

Gourmet burgers are widely seen as better for you than burgers from a fast food restaurant. The interest in healthiness is a long-established trend and expected to endure. The perception of gourmet burgers as the healthier choice – if retained - should therefore bode well for gourmet burger segment.

Opinions are divided on whether burger restaurants should have the option to cook beef burgers rare, continuing to highlight the thorny issue, and the importance of customer buy-in to steps to address the potential risk posed by beef burgers.

Appendix - Methodology

Consumer research methodology

Exclusive and original quantitative consumer research is commissioned for almost all Mintel reports. Consumer research is conducted among a nationally representative sample of either adults or internet users and is generally carried out by Lightspeed GMI (online), Ipsos Mori (face to face), while other suppliers are used on an ad hoc basis as required. The results are only available in Mintel reports.

As with all survey data, the consideration should be held in mind when analysing the results, that reported behaviour does not necessarily capture people's actual practices. Firstly, respondents may be reluctant to admit to certain opinions or behaviours due to social desirability bias. However, where surveys are conducted online, through self-completion and with no interviewer present, this should minimise the risk. There is also the risk that respondents may miss or misinterpret questions. However, control measures are in place to try and reduce this. Finally, respondents' recall may not be accurate, a consideration which has been taken into account in the questionnaire design. Nevertheless, the fact that the survey data is self-reported should be kept in mind where behaviour or attitudes based on survey data are referred to.

Sampling and weighting

Online Surveys - Lightspeed GMI

Founded in 1999, GMI's double opt-in online consumer panel has reach to approximately 350,000 consumers in Great Britain. Re-branded as Lightspeed GMI in September 2014 (after its acquisition by Kantar in 2011), it delivers uniquely identified online respondents via extensive use of fraud detection and location-verification technology at multiple points in the research cycle, from initial registration through survey fielding and incentive redemption. Lightspeed GMI panellists are profiled on a wide variety of attributes to deliver the specific hard-to-reach demographics.

Further details of the panel, including sample sources, recruitment and sample validation and panel management are available on request from Lightspeed GMI.

To ensure our surveys are nationally representative of internet users, Mintel sets quotas for each age group, split by gender. Specific quotas for a sample of 2,000 adults aged 16+ are shown below:

Age groups by gender	%	N
16-19 men	3.6	72
16-19 women	3.4	68
20-24 men	4.9	98
20-24 women	4.8	95
25-34 men	9.4	189
25-34 women	9.5	190
35-44 men	9.3	186
35-44 women	9.5	190
45-54 men	9.3	186
45-54 women	9.4	189

55-64 men	7.0	140
55-64 women	7.2	144
65+ men	5.7	113
65+ women	7.0	140
Total	100	2,000

Mintel also sets quotas on region and socio-economic group. Specific quotas for a sample of 2,000 adults aged 16+ are shown below:

	%	**N**
Region		
North East	4.2	84
North West	11.5	229
Yorkshire & Humberside	8.6	172
East Midlands	7.4	148
West Midlands	9.1	182
Greater London	13.4	269
South East/East Anglia	23.6	473
South West	8.6	172
Wales	5.0	99
Scotland	8.6	172
Total	100	2,000

	%	**N**
Socio-economic group		
AB	22.3	446
C1	30.9	618
C2	20.9	418
DE	25.9	518
Total	100	2,000

Definitions

Socio-economic groups are based on the head of household or chief income earner and are defined as follows:

Socio-economic group	**Occupation of chief income earner**
A	Higher managerial, administrative or professional
B	Intermediate managerial, administrative or professional
C1	Supervisory or clerical, and junior managerial, administrative or professional
C2	Skilled manual workers
D	Semi and unskilled manual workers
E	All those entirely dependent on the state long term, through sickness, unemployment, old age or other reasons

Retired persons who have a company pension or private pension, or who have private means are graded on their previous occupation.

Students in higher education living at home are graded on the occupation of the head of the household. Students living away from home are graded C1 (no account is taken of casual or vacation jobs).

Desk research methodology

Mintel market analysts have reviewed leading trade press coverage of burgers and foodservice companies operating in this segment, also reviewing company press, websites and social media sites as well as annual company reports and accounts and mainstream consumer press.

This information is supplemented by an extensive library of Mintel's reports produced since 1972 and added to each year by the 500+ reports which are produced annually, such as Burger and Chicken Restaurants (UK), August 2015 and Pub Catering (UK), May 2015.

Mintel followed a three-pronged approach to ascertain whether the identified leading chains serve pink or medium burgers: 1) a review of customer comments online 2) a review of the operators' menus 3) phoning two-three venues for each chain to request staff to describe how the burgers are served and the presence of a company-wide policy on the matter. The reviews and interviews were undertaken 22nd-31st October 2015.

Nielsen Media Research

Nielsen Media Research (NMR) tracks advertising via the following channels: television, radio, press, internet display advertising, outdoor, cinema, direct mail and door drops. Spend on video, mobile, sponsorship, search and social is not currently measured by Nielsen Media Research. For most channels covered, Nielsen does not measure expenditure directly, but estimates it by monitoring usage and applying average measures of expenditure.

Appendix - Leading Pub Operators' Burger Offering

FIGURE 28: SELECTED LEADING PUB OPERATORS, BY OUTLET NUMBERS AND PRESENCE OF BURGERS ON THE MENU, 2015

Company	Main brand(s)	March/April 2015 outlet numbers	Burgers featured on the menu
Spirit Pub Group	Total	1,227	
	Chef & Brewer	138	Y
	Wacky Warehouse	95	na
	Local*	230	
	Taylor Walker	123**	Y
	Fayre & Square	158	Y
Enterprise Inns	Total	5,348	menus n/a
Greene King	Total	1,898	
	Hungry Horse	235	Y
	Old English Inns	126	Y
Mitchells & Butlers	Total	1,775	
	All Bar One	50	Y
	Browns	27	Y
	Ember Inns and Ember Pub & Dining	130	Y
	Harvester	213	Y
	Nicholson's	80	Y
	O'Neill's	36	Y
	Crown Carveries	112	N
	Sizzling Pub Co	223	Y
	Toby Carvery	158	N
	Vintage Inns	194	Y
	Village Pub & Kitchen	38	N
	Miller & Carter	35	Y
	Alex	41	na
JD Wetherspoon	Total	927	Y
Whitbread	Total	405	
	Beefeater	142	Y
	Brewers Fayre	157	Y
	Table Table	99	Y
	Taybarns	7	Y
Geronimo Inns	Total	37	Y

* formerly known as 'John Barras'

** includes 'Metropolitan' pubs

Note: Detailed outlet numbers are only provided for selected brands within the total portfolio of the listed operators

List of companies and outlet data originally published in "Burger and Chicken Restaurants". *Mintel*, August 2015

SOURCE: MINTEL

Appendix - Consumer Survey Data – "Burger and Chicken Restaurants"

The data in this section draws from consumer research conducted for "Burger and Chicken Restaurants", *Mintel*, August 2015, commissioned by Mintel. Research was carried out by Lightspeed GMI among 2,000 internet users aged 16+ in May 2015.

Gourmet burger bar and burger restaurant usage

FIGURE 29: BURGER RESTAURANT AND DOURMET BURGER BAR USAGE, BY DEMOGRAPHICS, MAY 2015

"Which, if any, of the following fast food outlets/restaurants have you eaten in or bought a takeaway from in the last 3 months?"

Base: 2,000 internet users aged 16+

	Sample size	Any burger restaurant	Gourmet burger bar (eg Gourmet Burger Kitchen, Haché)
	N	%	%
All	2,000	51	5
Gender:			
Male	997	51	6
Female	1,003	51	5
Age:			
16-17	77*	68	8
20-24	190	66	12
25-34	381	65	11
35-44	368	53	5
45-54	377	49	2
55-64	280	39	3
65+	266	24	1
16-24	328	67	10
25-34	381	65	11
35-44	368	53	5
45-54	377	49	2
55+	546	31	2
16-34	709	66	10
35-44	368	53	5
45-64	657	44	2
65+	266	24	1
16-44	1,077	61	8
45+	923	38	2
16-17	77*	68	8
18-24	251	67	11
25-34	381	65	11
35-44	368	53	5
45-54	377	49	2
55+	546	31	2
Gender by age UK:			
Male 16-24	166	64	8
Male 25-44	372	60	9
Male 45-64	325	45	2

Male 65+	134	25	1
Female 16-24	162	69	12
Female 25-44	377	58	7
Female 45-64	332	44	2
Female 65+	132	22	0
Region:			
Scotland	171	52	5
North East	84*	49	6
North West	228	49	3
Yorkshire & Humberside	171	46	6
East Midlands	148	50	5
West Midlands	182	48	6
Inner & Greater London	270	59	9
South East/East Anglia	474	52	5
South West	173	40	3
Wales	99*	59	6
Scotland	171	52	5
North East/North West	312	49	4
Yorkshire & Humberside	171	46	6
East Midlands	148	50	5
West Midlands	182	48	6
Inner & Greater London	270	59	9
South East/East Anglia	474	52	5
South West/Wales	272	47	4
Area:			
Urban location (ie living in a town/city)	819	57	8
Suburban/village/rural	1,181	47	4
Suburban location (ie close to town/city but living outside a town/city)	792	49	4
Village/rural location	389	42	3
Working status:			
Employed	1,046	57	7
Employee full-time (30+ hours/week)	760	58	9
Employee part-time (less than 30 hours/week)	286	56	3
Self-employed	134	45	7
Self-employed full-time (30+ hours/week)	77*	55	9
In full-time education	164	65	7
Retired	333	28	2
Not working for any other reason	323	49	2
Socio-economic group:			
A	99*	63	12
B	347	48	8
C1	618	49	6
C2	418	56	5
D	244	57	2
E	274	39	2
AB	446	52	9
C1C2	1,036	52	6
DE	518	47	2
ABC1	1,064	50	7
C2DE	936	51	3
Highest level of education:			
No formal qualification	103	35	1
GCSE/O-level or equivalent	479	53	3
AS/A-level or equivalent	328	59	6

Vocational qualification (eg NVQs, BTEC etc)	330	49	2
Further qualification (HNC, HND etc)	134	41	3
University degree (including undergraduate and master's degrees)	527	52	11
Gross annual household income:			
Under £9,500	171	46	2
£9,500-15,499	296	44	4
£15,500-24,999	423	54	4
£25,000-49,999	671	53	5
£50,000-74,999	167	56	13
£75,000 or over	83*	55	10
Rather not say	123	38	7
Under £15,500	467	45	3
£15,500-24,999	423	54	4
£25,000-49,999	671	53	5
£50,000 or over	250	56	12
Don't know/ Rather not say	189	43	7
Housing situation:			
My home is being bought on a mortgage	619	53	5
My home is owned outright	576	40	4
My home is rented from a Local Authority	184	60	5
My home is rented from a private landlord	401	60	7
My home is rented from a housing association	164	47	4
Presence of own children:			
Aged 5 and under	213	71	11
Aged 6-12	276	68	6
Aged 13-17	258	67	5
Aged 13-15	158	70	5
Aged 16-17	140	66	5
Aged 18+	242	49	3
I am not the parent/guardian of any children in my household	1,281	45	5
Parent (of under-18s):			
Parent (of under-18s)	556	67	7
Other	1,444	44	5
Parent (of under-16s):			
Parent (of under-16s)	487	68	7
Other	1,513	45	5
Parent status UK:			
Mothers – Parent (of under-16s)	268	67	6
Fathers – Parent (of under-16s)	219	68	9
Household size:			
1	353	41	4
2	692	41	5
3	408	56	5
4	357	64	7
5 or more	190	69	9
Current marital status:			
Non-married	875	52	7
Single	666	56	8
Married/Civil Partnership/Living As Married	1,125	50	4
Separated/divorced/widowed	209	41	2
Divorced	119	40	0
Financial situation:			

Healthy – I have money left at the end of the month for a few luxuries or to add to my savings	520	48	7
OK – I get by, but there's not a lot left by the time the basics are taken care of	887	54	6
Tight – I'm making ends meet, but only just	431	48	4
Struggling – I'm in danger of falling behind with bills or loan repayments	116	50	2
Struggling/In trouble	162	50	2
Generations:			
Millennials (16-35)	743	65	11
Millennials (younger) (1990-99) (16-25)	361	66	11
Millennials (older) (1980-89) (26-35)	382	64	11
Generation X (1965-79) (36-50)	557	53	3
Baby Boomers (1946-64) (51-69)	589	36	2
Swing Generation/World War II (1945 or before) (70+)	111	22	1

* Small sub-sample (75-100)
Source: Lightspeed GMI/Mintel

Attitudes

Figure 30: Agreement with the statement “If I had more money I would eat at other food outlets/restaurants more instead of fast food restaurants”, by demographics, May 2015

Base: 1,292 internet users aged 16+ who have eaten in or have bought a takeaway from a fast food restaurant/outlet in the last three months

	Sample size	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
	N	%	%	%	%	%
All	1,292	14	33	35	13	5
Gender:						
Male	660	12	31	36	16	5
Female	632	15	35	34	11	4
Age:						
20-24	154	16	44	31	6	3
25-34	305	18	36	36	9	1
35-44	248	15	30	34	15	5
45-54	232	9	28	37	16	10
55-64	136	7	26	40	21	5
65+	99*	9	28	35	21	6
16-24	272	18	42	31	8	2
25-34	305	18	36	36	9	1
35-44	248	15	30	34	15	5
45-54	232	9	28	37	16	10
55+	235	8	27	38	21	6
16-34	577	18	39	33	8	2
35-44	248	15	30	34	15	5
45-64	368	8	27	38	18	8
65+	99*	9	28	35	21	6
16-44	825	17	36	34	10	3
45+	467	8	28	37	19	8
18-24	206	17	40	32	8	2
25-34	305	18	36	36	9	1

35-44	248	15	30	34	15	5
45-54	232	9	28	37	16	10
55+	235	8	27	38	21	6
Gender by age UK:						
Male 16-24	137	14	40	34	7	4
Male 25-44	288	16	30	35	15	4
Male 45-64	186	8	26	39	20	8
Female 16-24	135	21	43	27	9	0
Female 25-44	265	17	37	35	8	2
Female 45-64	182	8	29	37	16	9
Region:						
Scotland	110	17	31	35	15	2
North West	150	11	35	37	13	4
Yorkshire & Humberside	106	8	34	42	8	8
East Midlands	97*	16	34	33	13	3
West Midlands	114	13	36	34	14	3
Inner & Greater London	195	20	35	29	13	3
South East/East Anglia	307	13	36	32	14	5
South West	94*	12	33	33	16	6
Scotland	110	17	31	35	15	2
North East/North West	201	11	31	39	13	5
Yorkshire & Humberside	106	8	34	42	8	8
East Midlands	97*	16	34	33	13	3
West Midlands	114	13	36	34	14	3
Inner & Greater London	195	20	35	29	13	3
South East/East Anglia	307	13	36	32	14	5
South West/Wales	162	12	26	40	15	7
Area:						
Urban location (ie living in a town/city)	580	18	33	33	11	4
Suburban/village/rural	712	11	33	36	15	5
Suburban location (ie close to town/city but living outside a town/city)	505	10	35	35	16	4
Village/rural location	207	14	29	39	14	6
Working status:						
Employed	750	15	34	34	13	5
Employee full-time (30+ hours/week)	552	15	34	32	13	5
Employee part-time (less than 30 hours/week)	198	14	33	38	11	4
Self-employed	78*	19	24	33	19	4
In full-time education	136	17	40	32	10	1
Retired	131	7	28	38	21	6
Not working for any other reason	197	11	32	40	12	5
Socio-economic group:						
B	229	16	32	29	18	4
C1	392	15	34	34	12	5
C2	294	13	31	38	14	4
D	164	10	35	40	11	4
E	143	10	34	36	14	5
AB	299	17	33	29	16	5
C1C2	686	14	33	36	13	5
DE	307	10	35	38	12	4
ABC1	691	16	33	32	14	5
C2DE	601	12	33	38	13	4
Highest level of education:						

GCSE/O-level or equivalent	312	10	33	39	16	3
AS/A-level or equivalent	236	15	33	36	11	4
Vocational qualification (eg NVQs, BTEC etc)	213	13	30	38	15	4
Further qualification (HNC, HND etc)	77*	17	30	29	14	10
University degree (including undergraduate and master's degrees)	339	17	39	29	11	4
Gross annual household income:						
Under £9,500	102	12	34	41	9	4
£9,500-15,499	173	13	31	35	16	5
£15,500-24,999	280	16	31	35	15	3
£25,000-49,999	454	16	35	33	12	4
£50,000-74,999	118	13	33	29	18	8
Under £15,500	275	12	32	37	13	5
£15,500-24,999	280	16	31	35	15	3
£25,000-49,999	454	16	35	33	12	4
£50,000 or over	173	12	34	29	15	9
Don't know/ Rather not say	110	8	30	45	12	5
Housing situation:						
My home is being bought on a mortgage	434	15	35	33	13	4
My home is owned outright	292	11	30	34	18	7
My home is rented from a Local Authority	130	12	29	42	13	4
My home is rented from a private landlord	289	16	34	35	12	3
My home is rented from a housing association	107	15	36	38	7	5
Presence of own children:						
Aged 5 and under	186	19	38	30	11	3
Aged 6-12	229	19	34	32	11	3
Aged 13-17	206	14	31	33	16	6
Aged 13-15	131	16	31	34	15	4
Aged 16-17	109	11	28	37	17	7
Aged 18+	152	10	35	37	14	5
I am not the parent/guardian of any children in my household	748	14	32	36	14	5
Parent (of under-18s):						
Parent (of under-18s)	454	16	34	33	13	4
Other	838	13	33	36	14	5
Parent (of under-16s):						
Parent (of under-16s)	402	16	34	34	13	3
Other	890	13	33	36	14	5
Parent status UK:						
Mothers – Parent (of under-16s)	218	14	40	35	9	2
Fathers – Parent (of under-16s)	184	20	26	33	17	4
Household size:						
1	188	12	32	39	13	4
2	369	13	30	36	16	5
3	286	14	38	32	12	4
4	292	15	32	33	14	5
5 or more	157	17	35	38	8	3
Current marital status:						
Non-married	577	15	37	35	11	3

Single	469	15	37	35	10	3
Married/Civil Partnership/Living As Married	715	13	30	35	16	6
Separated/divorced/widowed	108	14	39	32	13	2
Financial situation:						
Healthy – I have money left at the end of the month for a few luxuries or to add to my savings	326	15	26	34	17	8
OK – I get by, but there's not a lot left by the time the basics are taken care of	600	14	36	36	11	3
Tight – I'm making ends meet, but only just	269	11	34	38	13	4
Struggling/In trouble	97*	15	36	28	18	3
Generations:						
Millennials (16-35)	602	18	38	33	9	2
Millennials (younger) (1990-99) (16-25)	299	19	40	32	7	2
Millennials (older) (1980-89) (26-35)	303	17	37	35	10	1
Generation X (1965-79) (36-50)	367	13	31	34	15	7
Baby Boomers (1946-64) (51-69)	281	7	26	39	21	7

* Small sub-sample (75-100)
SOURCE: LIGHTSPEED GMI/MINTEL

FIGURE 31: AGREEMENT WITH THE STATEMENT "I WOULD BE INTERESTED IN TRYING GOURMET BURGERS AT FAST FOOD CHAINS (EG MCDONALD'S)", BY DEMOGRAPHICS, MAY 2015

Base: 1,292 internet users aged 16+ who have eaten in or have bought a takeaway from a fast food restaurant/outlet in the last three months

		Strongly agree	**Agree**	**Neither agree nor disagree**	**Disagree**	**Strongly disagree**
	N	%	%	%	%	%
All	1,292	11	41	32	11	5
Gender:						
Male	660	12	42	33	10	3
Female	632	11	40	30	13	6
Age:						
20-24	154	14	43	29	11	3
25-34	305	13	43	31	11	2
35-44	248	14	40	32	8	6
45-54	232	10	47	29	9	5
55-64	136	4	43	31	15	7
65+	99*	9	26	41	15	8
16-24	272	13	39	31	13	4
25-34	305	13	43	31	11	2
35-44	248	14	40	32	8	6
45-54	232	10	47	29	9	5
55+	235	6	36	35	15	8
16-34	577	13	41	31	12	3
35-44	248	14	40	32	8	6
45-64	368	8	45	30	11	6
65+	99*	9	26	41	15	8

16-44	825	13	41	31	11	4
45+	467	8	41	32	12	6
18-24	206	13	42	31	11	3
25-34	305	13	43	31	11	2
35-44	248	14	40	32	8	6
45-54	232	10	47	29	9	5
55+	235	6	36	35	15	8
Gender by age UK:						
Male 16-24	137	15	42	30	9	4
Male 25-44	288	15	41	33	9	2
Male 45-64	186	6	49	31	10	4
Female 16-24	135	10	37	33	16	4
Female 25-44	265	12	42	30	11	5
Female 45-64	182	9	41	29	13	8
Region:						
Scotland	110	9	49	31	8	3
North West	150	10	43	30	10	7
Yorkshire & Humberside	106	15	37	36	8	4
East Midlands	97*	7	45	35	9	3
West Midlands	114	15	35	35	9	6
Inner & Greater London	195	11	44	26	14	5
South East/East Anglia	307	11	41	30	12	6
South West	94*	12	39	30	16	3
Scotland	110	9	49	31	8	3
North East/North West	201	10	42	31	10	6
Yorkshire & Humberside	106	15	37	36	8	4
East Midlands	97*	7	45	35	9	3
West Midlands	114	15	35	35	9	6
Inner & Greater London	195	11	44	26	14	5
South East/East Anglia	307	11	41	30	12	6
South West/Wales	162	13	33	36	15	3
Area:						
Urban location (ie living in a town/city)	580	13	42	30	11	5
Suburban/village/rural	712	10	40	33	12	5
Suburban location (ie close to town/city but living outside a town/city)	505	11	40	31	13	5
Village/rural location	207	9	39	39	8	5
Working status:						
Employed	750	13	45	29	9	4
Employee full-time (30+ hours/week)	552	14	44	28	10	3
Employee part-time (less than 30 hours/week)	198	9	46	32	9	5
Self-employed	78*	8	37	35	15	5
In full-time education	136	9	32	39	16	4
Retired	131	7	34	37	15	7
Not working for any other reason	197	12	38	31	10	8
Socio-economic group:						
B	229	10	37	33	14	7
C1	392	11	43	31	11	4
C2	294	14	44	28	10	4
D	164	9	42	35	13	1
E	143	10	32	41	10	7
AB	299	12	39	30	12	7
C1C2	686	12	43	30	10	4

DE	307	9	37	37	12	4
ABC1	691	11	41	31	11	5
C2DE	601	11	41	33	11	4
Highest level of education:						
GCSE/O-level or equivalent	312	10	42	34	11	4
AS/A-level or equivalent	236	14	39	29	12	6
Vocational qualification (eg NVQs, BTEC etc)	213	10	40	31	14	4
Further qualification (HNC, HND etc)	77*	9	42	38	8	4
University degree (including undergraduate and master's degrees)	339	13	44	27	10	6
Gross annual household income:						
Under £9,500	102	9	36	45	7	3
£9,500-15,499	173	9	38	34	14	6
£15,500-24,999	280	12	41	33	9	5
£25,000-49,999	454	13	43	28	12	5
£50,000-74,999	118	14	46	25	10	5
Under £15,500	275	9	37	38	11	5
£15,500-24,999	280	12	41	33	9	5
£25,000-49,999	454	13	43	28	12	5
£50,000 or over	173	13	46	26	10	6
Don't know/ Rather not say	110	8	35	39	15	3
Housing situation:						
My home is being bought on a mortgage	434	14	40	30	12	4
My home is owned outright	292	10	42	29	11	8
My home is rented from a Local Authority	130	12	42	35	7	5
My home is rented from a private landlord	289	9	42	33	12	4
My home is rented from a housing association	107	13	37	36	10	4
Presence of own children:						
Aged 5 and under	186	13	42	34	6	4
Aged 6-12	229	21	41	30	5	3
Aged 13-17	206	14	45	26	11	4
Aged 13-15	131	16	46	26	8	4
Aged 16-17	109	12	45	25	14	5
Aged 18+	152	13	45	29	10	3
I am not the parent/guardian of any children in my household	748	10	39	32	13	5
Parent (of under-18s):						
Parent (of under-18s)	454	15	44	30	8	4
Other	838	10	39	33	13	5
Parent (of under-16s):						
Parent (of under-16s)	402	16	43	31	7	4
Other	890	9	40	32	13	5
Parent status UK:						
Mothers – Parent (of under-16s)	218	14	44	29	8	4
Fathers – Parent (of under-16s)	184	17	42	33	5	3
Household size:						
1	188	11	39	31	12	6
2	369	9	39	32	15	5

3	286	10	47	30	9	4
4	292	11	38	33	12	5
5 or more	157	20	43	32	4	2
Current marital status:						
Non-married	577	11	42	31	12	4
Single	469	12	41	31	12	4
Married/Civil Partnership/Living As Married	715	11	40	32	11	5
Separated/divorced/widowed	108	9	44	29	13	6
Financial situation:						
Healthy – I have money left at the end of the month for a few luxuries or to add to my savings	326	16	38	27	11	8
OK – I get by, but there's not a lot left by the time the basics are taken care of	600	11	45	29	13	4
Tight – I'm making ends meet, but only just	269	8	37	44	8	3
Struggling/In trouble	97*	10	39	32	11	7
Generations:						
Millennials (16-35)	602	13	41	31	11	3
Millennials (younger) (1990-99) (16-25)	299	12	39	31	13	4
Millennials (older) (1980-89) (26-35)	303	14	43	31	10	2
Generation X (1965-79) (36-50)	367	12	43	32	8	5
Baby Boomers (1946-64) (51-69)	281	6	40	32	14	8

* Small sub-sample (75-100)
SOURCE: LIGHTSPEED GMI/MINTEL

FIGURE 32: AGREEMENT WITH THE STATEMENT "GOURMET BURGERS (EG FROM GOURMET BURGER KITCHEN) ARE BETTER FOR YOU THAN BURGERS FROM A FAST FOOD RESTAURANT", BY DEMOGRAPHICS, MAY 2015

Base: 1,292 internet users aged 16+ who have eaten in or have bought a takeaway from a fast food restaurant/outlet in the last three months

		Strongly agree	**Agree**	**Neither agree nor disagree**	**Disagree**	**Strongly disagree**
	N	%	%	%	%	%
All	1,292	8	31	49	9	2
Gender:						
Male	660	9	31	49	10	2
Female	632	8	30	50	9	3
Age:						
20-24	154	13	39	39	5	5
25-34	305	8	36	45	9	1
35-44	248	10	33	46	9	2
45-54	232	7	22	58	12	1
55-64	136	2	26	55	14	3
65+	99*	6	21	63	6	4
16-24	272	12	35	43	7	3
25-34	305	8	36	45	9	1
35-44	248	10	33	46	9	2
45-54	232	7	22	58	12	1
55+	235	4	24	58	11	3

16-34	577	10	36	44	8	2
35-44	248	10	33	46	9	2
45-64	368	5	24	57	13	2
65+	99*	6	21	63	6	4
16-44	825	10	35	44	8	2
45+	467	5	23	58	11	2
18-24	206	13	37	41	5	4
25-34	305	8	36	45	9	1
35-44	248	10	33	46	9	2
45-54	232	7	22	58	12	1
55+	235	4	24	58	11	3
Gender by age UK:						
Male 16-24	137	12	39	39	7	3
Male 25-44	288	10	34	44	10	2
Male 45-64	186	6	21	62	11	1
Female 16-24	135	13	31	47	6	4
Female 25-44	265	9	35	47	8	2
Female 45-64	182	4	26	52	14	3
Region:						
Scotland	110	7	32	51	8	2
North West	150	9	27	52	9	3
Yorkshire & Humberside	106	11	32	42	12	3
East Midlands	97*	9	41	42	4	3
West Midlands	114	10	26	54	9	2
Inner & Greater London	195	11	34	44	10	2
South East/East Anglia	307	8	30	50	9	3
South West	94*	3	32	49	14	2
Scotland	110	7	32	51	8	2
North East/North West	201	8	27	53	9	2
Yorkshire & Humberside	106	11	32	42	12	3
East Midlands	97*	9	41	42	4	3
West Midlands	114	10	26	54	9	2
Inner & Greater London	195	11	34	44	10	2
South East/East Anglia	307	8	30	50	9	3
South West/Wales	162	4	26	56	12	1
Area:						
Urban location (ie living in a town/city)	580	10	34	44	10	3
Suburban/village/rural	712	7	28	54	9	2
Suburban location (ie close to town/city but living outside a town/city)	505	7	29	53	9	2
Village/rural location	207	7	26	56	10	2
Working status:						
Employed	750	10	34	45	9	2
Employee full-time (30+ hours/week)	552	11	34	45	8	2
Employee part-time (less than 30 hours/week)	198	7	33	45	12	3
Self-employed	78*	5	33	47	12	3
In full-time education	136	12	30	51	6	1
Retired	131	5	20	65	7	4
Not working for any other reason	197	5	24	56	13	2
Socio-economic group:						
B	229	10	34	43	10	2
C1	392	8	32	48	9	2
C2	294	9	33	49	8	2
D	164	5	23	59	10	3

E	143	6	21	56	15	3
AB	299	12	35	43	8	2
C1C2	686	8	33	49	9	2
DE	307	5	22	58	12	3
ABC1	691	10	33	46	9	2
C2DE	601	7	27	53	10	2
Highest level of education:						
GCSE/O-level or equivalent	312	7	24	59	8	3
AS/A-level or equivalent	236	11	31	46	9	3
Vocational qualification (eg NVQs, BTEC etc)	213	6	28	55	10	1
Further qualification (HNC, HND etc)	77*	6	29	56	6	3
University degree (including undergraduate and master's degrees)	339	12	37	37	12	1
Gross annual household income:						
Under £9,500	102	9	25	55	9	2
£9,500-15,499	173	6	28	51	11	3
£15,500-24,999	280	8	29	50	10	3
£25,000-49,999	454	9	34	46	9	2
£50,000-74,999	118	10	33	46	9	2
Under £15,500	275	7	27	53	10	3
£15,500-24,999	280	8	29	50	10	3
£25,000-49,999	454	9	34	46	9	2
£50,000 or over	173	12	34	45	8	2
Don't know/ Rather not say	110	5	24	59	11	2
Housing situation:						
My home is being bought on a mortgage	434	12	34	45	8	1
My home is owned outright	292	6	26	55	9	4
My home is rented from a Local Authority	130	5	26	52	14	3
My home is rented from a private landlord	289	8	32	47	11	2
My home is rented from a housing association	107	7	25	59	7	1
Presence of own children:						
Aged 5 and under	186	12	35	45	6	2
Aged 6-12	229	10	35	46	7	1
Aged 13-17	206	9	32	47	11	1
Aged 13-15	131	8	31	48	11	2
Aged 16-17	109	12	32	44	11	1
Aged 18+	152	8	26	51	14	1
I am not the parent/guardian of any children in my household	748	8	29	51	10	3
Parent (of under-18s):						
Parent (of under-18s)	454	10	34	47	7	2
Other	838	7	29	51	10	3
Parent (of under-16s):						
Parent (of under-16s)	402	10	35	47	7	1
Other	890	8	29	51	10	3
Parent status UK:						
Mothers – Parent (of under-16s)	218	9	35	50	5	1
Fathers – Parent (of under-16s)	184	12	34	43	9	2
Household size:						
1	188	8	29	52	8	4

2	369	7	26	53	11	3
3	286	9	36	45	8	2
4	292	10	32	45	12	2
5 or more	157	10	30	54	5	1
Current marital status:						
Non-married	577	9	31	48	10	2
Single	469	10	31	48	8	3
Married/Civil Partnership/Living As Married	715	8	30	50	9	2
Separated/divorced/widowed	108	5	28	50	17	1
Financial situation:						
Healthy – I have money left at the end of the month for a few luxuries or to add to my savings	326	11	32	44	10	3
OK – I get by, but there's not a lot left by the time the basics are taken care of	600	8	33	49	8	2
Tight – I'm making ends meet, but only just	269	9	27	53	10	1
Struggling/In trouble	97*	3	23	57	15	2
Generations:						
Millennials (16-35)	602	11	35	44	8	2
Millennials (younger) (1990-99) (16-25)	299	12	36	43	6	3
Millennials (older) (1980-89) (26-35)	303	10	34	45	10	1
Generation X (1965-79) (36-50)	367	7	31	50	10	2
Baby Boomers (1946-64) (51-69)	281	5	20	59	13	2

* Small sub-sample (75-100)
SOURCE: LIGHTSPEED GMI/MINTEL

FIGURE 33: AGREEMENT WITH THE STATEMENT "BURGER RESTAURANTS SHOULD HAVE THE OPTION TO COOK BEEF BURGERS RARE", BY DEMOGRAPHICS, MAY 2015

Base: 1,292 internet users aged 16+ who have eaten in or have bought a takeaway from a fast food restaurant/outlet in the last three months

		Strongly agree	**Agree**	**Neither agree nor disagree**	**Disagree**	**Strongly disagre e**
	N	%	%	%	%	%
All	1,292	7	23	37	23	10
Gender:						
Male	660	8	28	37	19	8
Female	632	6	18	38	26	12
Age:						
20-24	154	9	30	34	18	10
25-34	305	8	29	34	22	8
35-44	248	10	24	31	22	13
45-54	232	6	21	36	27	10
55-64	136	2	15	46	24	13
65+	99*	4	11	47	25	12
16-24	272	8	26	38	19	9
25-34	305	8	29	34	22	8
35-44	248	10	24	31	22	13
45-54	232	6	21	36	27	10
55+	235	3	13	47	25	12

16-34	577	8	27	36	21	8
35-44	248	10	24	31	22	13
45-64	368	4	19	40	26	11
65+	99*	4	11	47	25	12
16-44	825	8	26	34	21	10
45+	467	4	17	42	26	11
18-24	206	8	28	37	17	10
25-34	305	8	29	34	22	8
35-44	248	10	24	31	22	13
45-54	232	6	21	36	27	10
55+	235	3	13	47	25	12
Gender by age UK:						
Male 16-24	137	11	30	36	18	6
Male 25-44	288	9	31	33	18	8
Male 45-64	186	5	25	40	21	9
Female 16-24	135	5	21	39	21	13
Female 25-44	265	8	22	33	26	12
Female 45-64	182	4	13	40	31	13
Region:						
Scotland	110	4	18	42	23	14
North West	150	6	21	41	19	13
Yorkshire & Humberside	106	8	22	39	20	12
East Midlands	97*	11	22	34	18	15
West Midlands	114	4	32	34	21	8
Inner & Greater London	195	9	22	35	27	7
South East/East Anglia	307	7	27	33	23	10
South West	94*	7	21	36	30	5
Scotland	110	4	18	42	23	14
North East/North West	201	6	22	40	20	11
Yorkshire & Humberside	106	8	22	39	20	12
East Midlands	97*	11	22	34	18	15
West Midlands	114	4	32	34	21	8
Inner & Greater London	195	9	22	35	27	7
South East/East Anglia	307	7	27	33	23	10
South West/Wales	162	7	17	41	27	7
Area:						
Urban location (ie living in a town/city)	580	9	26	33	22	9
Suburban/village/rural	712	5	21	40	24	11
Suburban location (ie close to town/city but living outside a town/city)	505	5	21	39	24	11
Village/rural location	207	5	20	42	23	10
Working status:						
Employed	750	9	26	34	22	10
Employee full-time (30+ hours/week)	552	9	28	33	19	10
Employee part-time (less than 30 hours/week)	198	6	19	34	29	12
Self-employed	78*	8	33	37	17	5
In full-time education	136	7	22	41	23	7
Retired	131	4	9	47	30	10
Not working for any other reason	197	2	19	40	24	15
Socio-economic group:						
B	229	7	22	32	28	10
C1	392	8	23	35	23	10
C2	294	8	26	38	20	7
D	164	5	20	43	22	10

E	143	1	17	48	22	12
AB	299	8	24	30	26	12
C1C2	686	8	25	36	22	9
DE	307	3	19	45	22	11
ABC1	691	8	24	33	24	11
C2DE	601	5	22	42	21	9
Highest level of education:						
GCSE/O-level or equivalent	312	6	21	38	25	10
AS/A-level or equivalent	236	8	25	32	23	11
Vocational qualification (eg NVQs, BTEC etc)	213	5	23	40	23	9
Further qualification (HNC, HND etc)	77*	4	27	29	22	18
University degree (including undergraduate and master's degrees)	339	9	24	37	21	8
Gross annual household income:						
Under £9,500	102	5	19	49	18	10
£9,500-15,499	173	7	18	36	23	15
£15,500-24,999	280	8	21	39	21	11
£25,000-49,999	454	7	29	32	25	8
£50,000-74,999	118	11	26	29	25	8
Under £15,500	275	6	19	41	21	13
£15,500-24,999	280	8	21	39	21	11
£25,000-49,999	454	7	29	32	25	8
£50,000 or over	173	10	25	31	24	10
Don't know/ Rather not say	110	2	12	55	21	11
Housing situation:						
My home is being bought on a mortgage	434	7	25	32	26	9
My home is owned outright	292	6	18	40	23	13
My home is rented from a Local Authority	130	8	25	42	15	10
My home is rented from a private landlord	289	6	28	35	22	9
My home is rented from a housing association	107	8	17	41	24	9
Presence of own children:						
Aged 5 and under	186	9	30	32	20	10
Aged 6-12	229	10	28	29	25	9
Aged 13-17	206	14	22	31	25	8
Aged 13-15	131	15	24	31	24	6
Aged 16-17	109	14	20	31	25	10
Aged 18+	152	8	22	37	25	9
I am not the parent/guardian of any children in my household	748	5	20	41	23	11
Parent (of under-18s):						
Parent (of under-18s)	454	10	28	30	22	9
Other	838	5	20	41	23	11
Parent (of under-16s):						
Parent (of under-16s)	402	10	28	30	22	9
Other	890	5	21	40	23	11
Parent status UK:						
Mothers – Parent (of under-16s)	218	9	25	31	25	11
Fathers – Parent (of under-16s)	184	12	33	30	18	7
Household size:						

1	188	7	18	41	17	16
2	369	5	21	38	27	9
3	286	6	29	36	21	9
4	292	9	23	34	25	10
5 or more	157	10	24	37	22	7
Current marital status:						
Non-married	577	7	23	39	20	10
Single	469	7	26	38	19	10
Married/Civil Partnership/Living As Married	715	6	23	36	25	10
Separated/divorced/widowed	108	8	13	44	25	10
Financial situation:						
Healthy – I have money left at the end of the month for a few luxuries or to add to my savings	326	10	20	37	23	11
OK – I get by, but there's not a lot left by the time the basics are taken care of	600	6	26	35	24	9
Tight – I'm making ends meet, but only just	269	5	24	43	17	10
Struggling/In trouble	97*	6	16	35	30	12
Generations:						
Millennials (16-35)	602	8	28	35	21	8
Millennials (younger) (1990-99) (16-25)	299	8	25	38	20	9
Millennials (older) (1980-89) (26-35)	303	9	30	32	22	8
Generation X (1965-79) (36-50)	367	8	24	34	23	12
Baby Boomers (1946-64) (51-69)	281	3	14	43	26	13

* Small sub-sample (75-100)
SOURCE: LIGHTSPEED GMI/MINTEL

Menu enticements

FIGURE 34: CHICKEN/BURGER BAR MENU ENTICEMENTS, BY DEMOGRAPHICS, MAY 2015

"Which, if any, of the following would you be most interested in trying at a fast food restaurant (eg McDonald's, Burger King etc)?"

Base: 1,292 internet users aged 16+ who have eaten in or have bought a takeaway from a fast food restaurant/outlet in the last three months

	All
	%
Burgers containing thicker meat	29
Different types of meat burger (eg pork, lamb, turkey)	28
A greater selection of burger toppings (eg chorizo)	26
Burgers made using more premium bread (eg brioche bun)	24
A greater selection of dips/sauces (eg wasabi mayonnaise)	19
A greater selection of sides (eg deep fried pickles, guacamole)	19
A greater variety of fish/shellfish dishes (eg prawns in a crispy coating, Thai fishcake)	18
A greater variety of vegetarian burgers (eg Quorn burger, Portobello mushroom burger)	17
Mini chicken, beef or veggie burgers (eg sliders)	16
Ethnic-style dishes (eg falafel 'nuggets')	13
Grain based side dishes (eg quinoa, rice pots)	13
None of these	19

SOURCE: LIGHTSPEED GMI/MINTEL

FIGURE 35: SELECTED CHICKEN/BURGER BAR MENU ENTICEMENTS, BY DEMOGRAPHICS, MAY 2015

"Which, if any, of the following would you be most interested in trying at a fast food restaurant (eg McDonald's, Burger King etc)?"

Base: 1,292 internet users aged 16+ who have eaten in or have bought a takeaway from a fast food restaurant/outlet in the last three months

	Sample size	**Burgers containing thicker meat**	**Different types of meat burger (eg pork, lamb, turkey)**	**A greater selection of burger toppings (eg chorizo)**	**Burgers made using more premium bread (eg brioche bun)**
	N	%	%	%	%
All	1,292	29	28	26	24
Gender:					
Male	660	36	30	29	25
Female	632	22	26	23	23
Age:					
20-24	154	34	20	31	23
25-34	305	29	29	27	25
35-44	248	32	31	25	25
45-54	232	28	25	28	24
55-64	136	27	31	21	24
65+	99*	25	28	13	25
16-24	272	31	26	32	22
25-34	305	29	29	27	25
35-44	248	32	31	25	25
45-54	232	28	25	28	24
55+	235	26	30	17	24
16-34	577	30	28	29	24
35-44	248	32	31	25	25
45-64	368	28	27	26	24
65+	99*	25	28	13	25
16-44	825	31	29	28	24
45+	467	27	28	23	24
18-24	206	30	23	30	20
25-34	305	29	29	27	25
35-44	248	32	31	25	25
45-54	232	28	25	28	24
55+	235	26	30	17	24
Gender by age UK:					
Male 16-24	137	34	23	33	20
Male 25-44	288	37	32	26	28
Male 45-64	186	39	34	34	26
Female 16-24	135	28	30	30	24
Female 25-44	265	23	27	25	22
Female 45-64	182	16	20	17	21
Region:					
Scotland	110	21	30	31	27
North West	150	25	29	16	22
Yorkshire & Humberside	106	28	28	35	28
East Midlands	97*	33	32	30	22
West Midlands	114	30	25	26	21
Inner & Greater London	195	26	27	28	24

South East/East Anglia	307	34	27	24	22
South West	94*	35	31	24	32
Scotland	110	21	30	31	27
North East/North West	201	25	30	19	23
Yorkshire & Humberside	106	28	28	35	28
East Midlands	97*	33	32	30	22
West Midlands	114	30	25	26	21
Inner & Greater London	195	26	27	28	24
South East/East Anglia	307	34	27	24	22
South West/Wales	162	35	28	25	27
Area:					
Urban location (ie living in a town/city)	580	29	30	28	25
Suburban/village/rural	712	30	27	25	23
Suburban location (ie close to town/city but living outside a town/city)	505	30	27	25	24
Village/rural location	207	29	28	25	22
Working status:					
Employed	750	31	28	27	24
Employee full-time (30+ hours/week)	552	33	30	29	25
Employee part-time (less than 30 hours/week)	198	25	24	23	22
Self-employed	78*	29	26	29	26
In full-time education	136	30	29	34	23
Retired	131	24	30	16	28
Not working for any other reason	197	28	28	22	21
Socio-economic group:					
B	229	21	29	23	28
C1	392	28	28	31	25
C2	294	32	28	26	24
D	164	29	27	19	15
E	143	34	27	23	21
AB	299	27	30	25	29
C1C2	686	30	28	29	25
DE	307	31	27	21	18
ABC1	691	28	29	29	27
C2DE	601	32	28	23	21
Highest level of education:					
GCSE/O-level or equivalent	312	31	25	23	21
AS/A-level or equivalent	236	31	29	30	23
Vocational qualification (eg NVQs, BTEC etc)	213	29	26	21	20
Further qualification (HNC, HND etc)	77*	30	35	25	29
University degree (including undergraduate and master's degrees)	339	28	30	29	28
Gross annual household income:					
Under £9,500	102	37	26	23	21
£9,500-15,499	173	26	28	24	20
£15,500-24,999	280	29	25	28	23
£25,000-49,999	454	30	32	26	25
£50,000-74,999	118	37	28	29	30

Under £15,500	275	30	28	23	20
£15,500-24,999	280	29	25	28	23
£25,000-49,999	454	30	32	26	25
£50,000 or over	173	35	29	27	32
Don't know/ Rather not say	110	21	23	25	19
Housing situation:					
My home is being bought on a mortgage	434	29	29	26	25
My home is owned outright	292	30	30	19	26
My home is rented from a Local Authority	130	30	25	23	19
My home is rented from a private landlord	289	29	27	31	23
My home is rented from a housing association	107	30	31	30	27
Presence of own children:					
Aged 5 and under	186	30	20	21	21
Aged 6-12	229	32	31	27	25
Aged 13-17	206	29	30	28	23
Aged 13-15	131	30	31	25	24
Aged 16-17	109	28	25	33	23
Aged 18+	152	30	36	22	25
I am not the parent/guardian of any children in my household	748	30	28	27	24
Parent (of under-18s):					
Parent (of under-18s)	454	29	28	25	25
Other	838	30	29	26	24
Parent (of under-16s):					
Parent (of under-16s)	402	29	28	24	25
Other	890	30	29	27	23
Parent status UK:					
Mothers – Parent (of under-16s)	218	25	22	21	22
Fathers – Parent (of under-16s)	184	33	34	28	30
Household size:					
1	188	34	23	29	21
2	369	28	30	27	23
3	286	28	30	23	27
4	292	26	28	25	24
5 or more	157	37	27	28	24
Current marital status:					
Non-married	577	30	27	29	23
Single	469	31	28	30	24
Married/Civil Partnership/Living As Married	715	29	29	23	25
Separated/divorced/widowed	108	24	24	28	20
Financial situation:					
Healthy – I have money left at the end of the month for a few luxuries or to add to my savings	326	30	28	24	31
OK – I get by, but there's not a lot left by the time the basics are taken care of	600	28	30	28	23
Tight – I'm making ends meet, but only just	269	30	26	24	22

Struggling/In trouble	97*	33	28	27	19
Generations:					
Millennials (16-35)	602	30	28	29	24
Millennials (younger) (1990-99) (16-25)	299	30	27	31	23
Millennials (older) (1980-89) (26-35)	303	30	28	27	24
Generation X (1965-79) (36-50)	367	31	30	28	24
Baby Boomers (1946-64) (51-69)	281	27	27	18	24

* Small sub-sample (75-100)
SOURCE: LIGHTSPEED GMI/MINTEL

Appendix - Chicken and Burger Bar Restaurant User Survey

Ask All

Separator slide 4: Now we would like to ask you some questions about fast food outlets and restaurants, focusing in particular on chicken and burger restaurants such as Burger King, KFC, Gourmet Burger Kitchen and Nandos.

Ask all

Q33. [Restaurant] Which, if any, of the following fast food outlets/restaurants have you eaten in or bought a takeaway from in the last 3 months? *Please select all that apply.* **[multicode] [Trended with UK38 2014 Q14] [Consider for repertoire]**
[1] McDonald's
[2] KFC
[3] Subway
[4] Burger King
[5] Nando's
[6] Gourmet burger bar (eg Gourmet Burger Kitchen, Haché)
[7] Rotisserie chicken restaurant (eg Chicken Shop)
[8] Other chicken outlet (eg Southern Fried Chicken, Chicken Cottage, Favourite Fried Chicken)
[9] Other burger outlet (eg Wimpy)
[10] I have not eaten in or bought a takeaway from fast food outlets/restaurants in the last 3 months **[single code]**

Ask all who coded 1-9 in Q33 [eaters of chicken/burger at fast food outlets/restaurants]
All who code 10 in Q33 go to Q39

Q34. [Frequency] How frequently do you eat in/get a takeaway from the following fast food outlets and restaurants? *Please select one answer for each outlet/restaurant.* **[single code per row] [Trended with 2014 - UK38 – Q15]**

[Scriptors: Replicate rows based on responses at Q33]

	[1] More than once a week	[2] Once a week	[3] 2-3 times a month	[4] Once a month	[5] Less than once a month
[1] McDonald's					
[2] KFC					
[3] Subway					
[4] Burger King					
[5] Nando's					
[6] Gourmet burger bar (eg Gourmet Burger Kitchen, Hache)					
[7] Rotisserie chicken restaurant (eg Chicken Shop)					
[8] Other chicken outlet (eg Southern Fried Chicken, Chicken					

Cottage, Favourite Fried Chicken)					
[9] Other burger outlet (eg Wimpy)					

All from Q34 to Q35 [ie eaters of chicken/burger at fast food outlets/restaurants]

Q35. [eaters behaviours] Which of the following statements, if any, apply to you? *Please select all that apply.* **[multicode, randomize codes 1-5]**
[1] Meal deals at fast food restaurants make me eat more than I usually would
[2] Concerns about the healthiness of fast food have caused me to limit the amount I eat
[3] I have ordered healthier dishes at a fast food restaurant (eg salad, fruit)
[4] I have switched from fast food restaurants to gourmet burger restaurants
[5] I only eat gourmet burgers when I can afford it
[6] None of these **[single code, anchor]**

All from Q35 to Q36 [eaters of chicken/burger at fast food outlets/restaurants]

Q36. [concerns] Thinking about the food you eat at fast food restaurants, how concerned, if at all, are you about the following? *Please select one answer per concern.* **[Single code per row, randomize codes 1-7]**

	Net those coding columns 1-3 in each row as 'Any concerned'	[1] Extremely concerned	[2] Moderately concerned	[3] Slightly concerned	[4] Not at all concerned	[5] Don't know
[1]The amount of fat in burgers						
[2] The amount of calories in burgers						
[3] The amount of fat in fried chicken						
[4] The amount of salt in burgers						
[5] The amount of artificial ingredients used						
[6] The quality of the meat used						
[7] The animal welfare standards of meat used						

All from Q36 to Q37 [eaters of chicken/burger at fast food outlets/restaurants]

Q37. [interest] Which, if any, of the following would you be most interested in trying at a fast food restaurant (eg McDonald's, Burger King etc)? *Please select up to 5.* **[multicode, limit to 5, randomize codes 1-11]**

[1] Burgers made using more premium bread (eg brioche bun)
[2] A greater selection of sides (eg deep fried pickles, guacamole)
[3] Grain based side dishes (eg quinoa, rice pots)
[4] A greater selection of dips/sauces (eg wasabi mayonnaise)

[5] Burgers containing thicker meat
[6] A greater selection of burger toppings (eg chorizo)
[7] A greater variety of fish/shellfish dishes (eg prawns in a crispy coating, Thai fishcake)
[8] A greater variety of vegetarian burgers (eg Quorn burger, Portobello mushroom burger)
[9] Different types of meat burger (eg pork, lamb, turkey)
[10] Mini chicken, beef or veggie burgers (eg sliders)
[11] Ethnic-style dishes (eg falafel 'nuggets')
[12] None of these [single code, anchor]

All from Q37 to Q38 [eaters of chicken/burger at fast food outlets/restaurants]

Q38. [Attitudes] To what extent do you agree or disagree with each of the following statements?
Please select one per statement. **[single code per row, randomize codes 1-12] [Internal note: cluster analysis]**

	[1] Strongly agree	[2] Agree	[3] Neither agree or disagree	[4] Disagree	[5] Strongly disagree
Interest in something new (Do not display)					
[1] Burger restaurants should have the option to cook beef burgers rare					
[2] I would prefer to place an order in a fast food restaurant via an electronic device (eg a tablet) than to order at the counter					
[3] I would be interested in ordering home delivery from a fast food restaurant chain (eg McDonalds, Burger King)					
[4] The ability to design my your own sauce (eg mixing chilli sauce with mayo) in restaurants would appeal to me					
[5] I would be interested in trying gourmet burgers at fast food chains (eg McDonald's)					
Menu choices (Do not display)					
[6] I tend to order traditional menu items (eg beef or chicken burgers, whole fried chicken pieces) at fast food restaurants					
[7] The cut of meat used in chicken burgers (eg boneless thigh, breast of chicken etc) is of no concern to me					
[8] The quality of hot drinks served at fast food restaurants is worse than coffee served at mainstream coffee shops (eg Costa, Starbucks)					
Health concerns (Do not display)					
[9] I would rather eat a smaller portion of my favourite meal in a fast food restaurant (eg a mini Big Mac) than a reduced calorie version					
[10] If I had more money I would eat at other food outlets/restaurants more instead of fast food restaurants					
[11] Gourmet burgers (eg from Gourmet Burger Kitchen) are better for you than burgers from a fast food restaurant					
[12] Grilled/flame-grilled chicken (eg Nando's) is healthier than fried chicken (eg KFC)					

NET: Any Agree (columns 1-2)
NET: Any disagree (columns 4-5)

Ask all

Separator slide: We are now going to change the subject slightly and ask your opinion on eating in/takeaway food in general.

Ask all

Q39. [correspondence map] Which, if any, of the following qualities do you associate with each of the following restaurant/takeaway brands? *Please select all that apply for each brand.* **[Multicode per column, randomize codes 1-11] [scriptors, please show each column on a different page]**

	[1] McDonald's	[2] KFC	[3] Subway	[4] Pret-a-Manger	[5] Starbucks
[1] Affordable					
[2] Unhealthy					
[3] Good if you're in a rush					
[4] Good range of products					
[5] Child-friendly					
[6] Food doesn't feel freshly made					
[7] Ethical					
[8] Processed food					
[9] A good place to socialise					
[10] Good quality ingredients					
[11] None of these **[single code]**					

Ask all 18+

Appendix - Beef Burger Foodservice Consumer Survey Data

The data in this section draws from consumer research commissioned by Mintel. Research was carried out by Lightspeed GMI among 2,000 internet users aged 16+ in October 2015.

Beef burger uptake

FIGURE 36: BEEF BURGER UPTAKE AT FOODSERVICE VENUES IN THE PAST THREE MONTHS, OCTOBER 2015

"Have you eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months?"

Base: 2,000 internet users aged 16+

	%
Yes	46
No	54
Don't know	1

SOURCE: LIGHTSPEED GMI/MINTEL

FIGURE 37: BEEF BURGER UPTAKE AT FOODSERVICE VENUES IN THE PAST THREE MONTHS, BY DEMOGRAPHICS, OCTOBER 2015

"Have you eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months?"

Base: 2,000 internet users aged 16+

	All N	Yes %	No %	Don't know %
Total	2,000	46	54	1
Gender:				
Male	997	50	50	1
Female	1,003	42	57	1
Age:				
16-24	327	57	40	2
25-34	380	56	43	1
35-44	368	52	48	1
45-54	377	47	52	1
55+	548	26	74	0
16-34	707	57	42	1
35-44	368	52	48	1
45-64	658	41	58	0
65+	267	19	81	0
16-44	1075	55	44	1
45+	925	35	65	0
18-24	261	59	39	3
25-34	380	56	43	1
35-44	368	52	48	1
45-54	377	47	52	1
55+	548	26	74	0

Gender by Age:				
Male 16-24	166	62	36	2
Male 25-44	371	57	43	1
Male 45-64	326	46	53	1
Male 65+	134	23	77	0
Female 16-24	161	53	45	2
Female 25-44	377	52	48	0
Female 45-64	332	37	63	0
Female 65+	133	14	86	0
Region:				
Scotland	171	37	61	1
North East	84*	42	55	4
North West	228	47	53	0
Yorkshire & Humberside	171	41	58	1
East Midlands	148	43	55	3
West Midlands	182	51	48	1
Inner & Greater London	270	60	40	0
South East/East Anglia	474	44	55	0
South West	173	39	61	0
Wales	99*	42	57	1
Region:				
Scotland	171	37	61	1
North East/North West	312	46	53	1
Yorkshire & Humberside	171	41	58	1
East Midlands	148	43	55	3
West Midlands	182	51	48	1
Inner & Greater London	270	60	40	0
South East/East Anglia	474	44	55	0
South West/Wales	272	40	59	0
Area:				
Urban location (ie living in a town/city)	783	53	46	1
Suburban/Village/rural	1,217	41	58	1
Suburban location (ie close to town/city but living outside a town/city)	826	42	57	1
Village/rural location	391	38	61	1
Working status:				
Employed	1,015	53	46	1
Employee full-time (30+ hours/week)	734	55	45	1
Employee part-time (less than 30 hours/week)	281	50	49	1
Self-Employed	128	47	52	1
In full-time education	165	57	42	1
Retired	339	21	79	0
Not working for any other reason	353	42	56	2
Socio-economic group				
A	111	59	41	0
B	335	45	55	0
C1	618	46	54	1
C2	418	50	49	1
D	264	47	52	1
E	254	33	66	2
AB	446	48	51	0
C12	1036	47	52	1
DE	518	40	59	1
ABC1	1064	47	53	0
C2DE	936	44	54	1
Highest level of qualification:				
No formal qualification	107	36	63	2

GCSE/O-level or equivalent	506	48	52	0
AS/A-level or equivalent	324	50	49	1
Vocational qualification (eg NVQs, BTEC etc)	312	41	59	0
Further qualification (HNC, HND etc)	145	46	54	0
University degree (including undergraduate and master's degrees)	537	45	54	1
University degree/doctorate level or professional equivalent	571	46	53	1
Gross annual household income:				
Under £9,500	194	40	60	0
£9,500 - £15,499	296	40	59	1
£15,500 - £24,999	399	46	53	1
£25,000 - £49,999	648	48	51	1
£50,000 - £74,999	176	56	44	0
£75,000 or over	83 *	63	37	0
Don't know	77 *	43	56	1
Rather not say	127	33	65	2
Under £15,500	490	40	60	1
£15,500 - 24,999	399	46	53	1
£25,000 - 49,999	648	48	51	1
£50,000 or over	259	58	42	0
Don't know/Rather not say	204	37	62	1
Housing situation:				
My home is being bought on a mortgage	650	52	48	0
My home is owned outright	574	37	63	1
My home is rented from a Local Authority	184	50	49	1
My home is rented from a private landlord	376	48	51	1
My home is rented from a housing association	172	47	53	0
Other	44 *	39	57	5
Presence of own children:				
Aged 5 and under	200	66	33	1
Aged 6-12	278	65	33	1
Aged 13-17	292	55	45	0
Aged 13-15	182	59	41	1
Aged 16-17	167	51	48	1
Aged 18+	261	45	55	0
I am not the parent/guardian of any children in my household	1,249	40	59	1
Parent (of under-18s):				
Parent (of under-18s)	578	59	40	1
Other	1,422	40	59	1
Parent (of under-16s):				
Parent (of under-16s)	502	61	38	1
Other	1,498	41	59	1
Parent status UK:				
Mothers - Parent (of under-16s)	276	57	42	1
Fathers - Parent (of under-16s)	226	66	33	0
Household size:				
1	354	36	62	2
2	659	37	63	0
3	446	49	50	1
4	355	59	41	0
5 or more	186	63	36	1
Current marital status:				
Non-Married	876	45	54	1

Single	665	49	50	1
Married/Civil Partnership/Living As Married	1,124	47	53	0
Separated/Divorced/Widowed	211	32	67	1
Financial situation:				
Healthy - I have money left at the end of the month for a few luxuries or to add to my savings	457	45	54	1
OK - I get by, but there's not a lot left by the time the basics are taken care of	926	47	52	1
Tight - I'm making ends meet, but only just	442	45	55	0
Struggling / In trouble	175	46	54	1
Generation:				
Millennials (16-35)	747	58	41	1
Millennials (younger) (1990-1999) (16-25)	359	58	40	2
Millennials (older) (1980-1989) (26-35)	388	57	42	1
Generation X (1965-1979) (36-50) (T5)	540	50	49	1
Baby Boomers (1946-1964) (51-69)	586	33	67	0
Swing Generation/World War II (1945 or before) (70+)	127	18	82	0

* Small sub-sample (75-100)
SOURCE: LIGHTSPEED GMI/MINTEL

Venues for eating beef burgers

FIGURE 38: VENUES FROM WHICH DINERS HAVE EATEN BEEF BURGERS IN THE PAST THREE MONTHS, OCTOBER 2015

"From which of the following venues have you eaten beef burgers in the last 3 months?"

Base: 915 internet users 16+ who have eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months

	ALL
	%
Fast food outlet (eg McDonald's, Burger King, kebab shop)	71
Gourmet burger outlet (eg GBK, Byron)	18
Other restaurant (eg Bella Italia, Café Rouge)	14
Pub	27
Street food van (eg burger van)	13
Other foodservice venue	4

SOURCE: LIGHTSPEED GMI/MINTEL

FIGURE 39: MOST POPULAR VENUES FROM WHICH DINERS HAVE EATEN BEEF BURGERS IN THE PAST THREE MONTHS, BY DEMOGRAPHICS, OCTOBER 2015

"From which of the following venues have you eaten beef burgers in the last 3 months?"

Base: 915 internet users 16+ who have eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months

	All	**Fast food outlet (eg McDonald's, Burger King, kebab shop)**	**Gourmet burger outlet (eg GBK, Byron)**	**Other restaurant (eg Bella Italia, Café Rouge)**
	N	%	%	%
Total	915	71	18	14

Gender:				
Male	494	70	20	13
Female	421	71	15	14
Age:				
16-24	188	69	24	17
16-34	402	69	24	19
16-44	593	71	22	16
25-34	214	69	25	20
35-44	191	74	17	10
45-54	177	79	11	7
45+	322	71	10	10
55+	145	61	8	12
Gender by age:				
Male 16-24	103	68	26	16
Male 25-44	210	70	26	16
Male 45-64	150	75	11	7
Male 45+	181	72	10	9
Female 16-24	85 *	71	21	19
Female 25-44	195	73	16	15
Female 45-64	122	72	9	11
Female 45+	141	70	9	11
Region:				
Scotland and the North	207	76	14	12
Yorkshire & Humberside	70 *	69	17	9
The Midlands	156	72	16	17
Inner & Greater London	163	69	23	18
South East/East Anglia	209	71	17	12
South West/Wales	110	63	20	13
Area:				
Urban location (ie living in a town/city)	418	70	20	17
Suburban/village/rural	497	72	16	11
Suburban location (ie close to town/city but living outside a town/city)	347	71	17	12
Village/rural location	150	73	14	9
Working status:				
Employed/self-employed	603	71	20	15
Employed	543	72	20	14
Employee full-time (30+ hours/week)	402	71	23	15
Employee part-time (less than 30 hours/week)	141	74	11	12
In full-time education	94 *	72	23	18
Retired/not working for any other reason	218	69	8	9
Not working for any other reason	147	76	8	7
Socio-economic group:				
B	150	65	27	16
C1	283	68	21	16
C2	208	76	12	14
D	125	78	7	9
E	83 *	77	7	5
AB	216	64	29	16
C12	491	71	17	15
DE	208	77	7	7
ABC1	499	66	24	16
C2DE	416	77	10	11
Highest level of qualification:				

No formal qualification/GCSE/O-level or equivalent	279	74	9	9
GCSE/O-level or equivalent	241	73	10	9
AS/A-level or equivalent	162	70	20	19
Vocational qualification (eg NVQs, BTEC etc)/Further qualification (HNC, HND etc)	195	72	15	9
Vocational qualification (eg NVQs, BTEC etc)	128	74	8	11
University degree/doctorate level or professional equivalent	261	68	26	18
University degree (including undergraduate and master's degrees)	244	68	27	19
Gross annual household income:				
Under £15,500	194	72	12	11
£15,500 - 24,999	184	73	14	17
£25,000 - 49,999	311	72	18	13
£50,000 or over	151	68	28	17
Don't know/Rather not say	75 *	67	21	11
Housing situation:				
My home is being bought on a mortgage	336	69	21	13
My home is owned outright	210	66	16	18
My home is rented from a Local Authority	92 *	85	8	8
My home is rented from a private landlord	179	70	19	15
My home is rented from a housing association	81 *	79	14	10
Presence of own children:				
Aged 5 and under	132	73	23	18
Aged 6-12	182	80	20	15
Aged 13-17	160	78	14	11
Aged 13-15	107	79	19	11
Aged 16-17	86 *	81	6	13
Aged 18+	117	76	10	11
I am not the parent/guardian of any children in my household	501	67	18	13
Parent (of under-18s):				
Parent (of under-18s)	343	76	19	14
Other	572	68	17	13
Parent (of under-16s):				
Parent (of under-16s)	308	76	20	15
Other	607	68	16	13
Parent status UK:				
Mothers – Parent (of under-16s)	158	78	13	15
Fathers – Parent (of under-16s)	150	74	28	15
Household size:				
1	127	68	13	10
2	244	66	17	13
3	217	69	18	17
4	210	76	20	12
5 or more	117	81	20	15
Current marital status:				
Non-Married	390	72	19	14
Single/Separated/Divorced/Widowed	390	72	19	14
Single	323	71	20	15
Married/Civil Partnership/Living As Married	525	70	17	14

Financial situation:				
Healthy - I have money left at the end of the month for a few luxuries or to add to my savings	205	61	26	19
OK - I get by, but there's not a lot left by the time the basics are taken care of	433	72	18	15
Tight - I'm making ends meet, but only just	197	77	12	7
Struggling / In trouble	80 *	73	11	8
Generations:				
Millennials (16-35)	431	71	24	19
Millennials (younger) (1990-99) (16-25)	208	69	23	17
Millennials (older) (1980-89) (26-35)	223	72	25	20
Generation X (1965-79) (36-50)	269	75	15	7
Baby Boomers(1946-64) (51-69) /Swing Generation/World War II (1945 or before) (70+)	215	67	9	12
Baby Boomers (1946-64) (51-69)	192	67	9	11

* Small sub-sample (75-100)
SOURCE: LIGHTSPEED GMI/MINTEL

FIGURE 40: NEXT MOST POPULAR VENUES FROM WHICH DINERS HAVE EATEN BEEF BURGERS IN THE PAST THREE MONTHS, BY DEMOGRAPHICS, OCTOBER 2015

"From which of the following venues have you eaten beef burgers in the last 3 months?"

Base: 915 internet users 16+ who have eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months

	All	Pub	Street food van (eg burger van)	Other foodservice venue
	N	%	%	%
Total	915	27	13	4
Gender:				
Male	494	28	15	5
Female	421	26	11	3
Age:				
16-24	188	26	12	5
16-34	402	30	14	4
16-44	593	30	14	4
25-34	214	33	17	3
35-44	191	29	13	4
45-54	177	20	13	3
45+	322	23	12	4
55+	145	27	10	6
Gender by age:				
Male 16-24	103	30	13	5
Male 25-44	210	30	17	4
Male 45-64	150	27	13	5
Male 45+	181	25	13	5
Female 16-24	85 *	21	11	5
Female 25-44	195	32	12	3
Female 45-64	122	19	11	2
Female 45+	141	20	10	3
Region:				

Scotland and the North	207	24	14	2
Yorkshire & Humberside	70 *	23	17	4
The Midlands	156	34	13	6
Inner & Greater London	163	26	11	4
South East/East Anglia	209	26	11	4
South West/Wales	110	30	15	5
Area:				
Urban location (ie living in a town/city)	418	26	12	5
Suburban/village/rural	497	29	14	3
Suburban location (ie close to town/city but living outside a town/city)	347	29	14	3
Village/rural location	150	27	13	3
Working status:				
Employed/self-employed	603	27	14	3
Employed	543	27	15	3
Employee full-time (30+ hours/week)	402	26	15	3
Employee part-time (less than 30 hours/week)	141	28	13	4
In full-time education	94 *	23	14	6
Retired/not working for any other reason	218	30	9	6
Not working for any other reason	147	29	10	6
Socio-economic group:				
B	150	30	15	4
C1	283	26	8	2
C2	208	26	19	4
D	125	24	11	6
E	83 *	33	10	5
AB	216	30	16	4
C12	491	26	13	3
DE	208	27	11	6
ABC1	499	27	12	3
C2DE	416	27	15	5
Highest level of qualification:				
No formal qualification/GCSE/O-level or equivalent	279	25	15	4
GCSE/O-level or equivalent	241	27	16	3
AS/A-level or equivalent	162	20	8	6
Vocational qualification (eg NVQs, BTEC etc)/Further qualification (HNC, HND etc)	195	28	12	5
Vocational qualification (eg NVQs, BTEC etc)	128	28	13	5
University degree/doctorate level or professional equivalent	261	34	16	2
University degree (including undergraduate and master's degrees)	244	35	15	2
Gross annual household income:				
Under £15,500	194	23	16	6
£15,500 - 24,999	184	24	11	4
£25,000 - 49,999	311	31	13	4
£50,000 or over	151	27	14	2
Don't know/Rather not say	75 *	28	11	4
Housing situation:				
My home is being bought on a mortgage	336	29	13	3
My home is owned outright	210	30	12	4
My home is rented from a Local Authority	92 *	17	16	1
My home is rented from a private landlord	179	28	15	5
My home is rented from a housing	81 *	20	11	6

association

Presence of own children:				
Aged 5 and under	132	35	18	2
Aged 6-12	182	29	17	2
Aged 13-17	160	28	18	1
Aged 13-15	107	30	20	1
Aged 16-17	86 *	24	16	1
Aged 18+	117	19	11	7
I am not the parent/guardian of any children in my household	501	29	12	4
Parent (of under-18s):				
Parent (of under-18s)	343	27	16	2
Other	572	27	11	5
Parent (of under-16s):				
Parent (of under-16s)	308	28	17	2
Other	607	27	11	5
Parent status UK:				
Mothers – Parent (of under-16s)	158	28	14	1
Fathers – Parent (of under-16s)	150	29	19	4
Household size:				
1	127	28	11	3
2	244	29	11	4
3	217	22	13	7
4	210	28	15	1
5 or more	117	32	15	3
Current marital status:				
Non-Married	390	28	12	5
Single/Separated/Divorced/Widowed	390	28	12	5
Single	323	28	13	4
Married/Civil Partnership/Living As Married	525	26	14	3
Financial situation:				
Healthy - I have money left at the end of the month for a few luxuries or to add to my savings	205	31	15	2
OK - I get by, but there's not a lot left by the time the basics are taken care of	433	27	12	4
Tight - I'm making ends meet, but only just	197	25	12	5
Struggling / In trouble	80 *	23	18	8
Generations:				
Millennials (16-35)	431	30	14	4
Millennials (younger) (1990-99) (16-25)	208	26	12	4
Millennials (older) (1980-89) (26-35)	223	34	16	4
Generation X (1965-79) (36-50)	269	25	14	3
Baby Boomers(1946-64) (51-69) /Swing Generation/World War II (1945 or before) (70+)	215	24	10	5
Baby Boomers (1946-64) (51-69)	192	23	11	5

* Small sub-sample (75-100)
SOURCE: LIGHTSPEED GMI/MINTEL

Preferred cooking level of beef burgers

FIGURE 41: PREFERRED COOKING LEVEL OF A BEEF BURGER, OCTOBER 2015

"Thinking about your perfect beef burger, how would you prefer to have it cooked?"

Base: 915 internet users 16+ who have eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months

	ALL
	%
Well-done (cooked through)	59
Medium (possible pink streaks inside)	27
Medium-rare (pink in the middle)	10
Rare (pink/red in the middle)	1
I don't have a preference	2

SOURCE: LIGHTSPEED GMI/MINTEL

FIGURE 42: PREFERRED COOKING LEVEL OF A BEEF BURGER, BY DEMOGRAPHICS, OCTOBER 2015

"Thinking about your perfect beef burger, how would you prefer to have it cooked?"

Base: 915 internet users 16+ who have eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months

	All	**Well-done (cooked through)**	**Medium (possible pink streaks inside)**	**Medium-rare (pink in the middle)**	**Rare (pink/red in the middle)**	**I don't have a preference**
	N	%	%	%	%	%
Total	915	59	27	10	1	2
Gender:						
Male	494	56	29	11	2	3
Female	421	63	25	10	1	1
Age:						
16-24	188	55	27	16	1	2
16-34	402	54	29	14	1	1
16-44	593	53	29	14	2	2
25-34	214	53	32	12	2	1
35-44	191	52	29	13	3	3
45-54	177	68	24	6	1	2
45+	322	70	22	4	1	2
55+	145	73	21	3	0	3
Gender by age:						
Male 16-24	103	58	22	17	2	1
Male 25-44	210	46	36	13	3	2
Male 45-64	150	65	25	5	1	3
Male 45+	181	66	24	5	1	4
Female 16-24	85 *	51	32	15	0	2
Female 25-44	195	59	25	12	2	2
Female 45-64	122	72	23	4	0	1
Female 45+	141	75	21	4	0	1
Region:						
Scotland and the North	207	64	23	9	2	2
North West	108	69	20	8	0	3

Yorkshire & Humberside	70 *	57	31	10	0	1
The Midlands	156	59	24	9	4	4
Inner & Greater London	163	61	23	13	1	2
South East/East Anglia	209	55	33	11	0	0
South West/Wales	110	58	28	11	1	2
Area:						
Urban location (ie living in a town/city)	418	60	27	10	1	3
Suburban/village/rural	497	59	27	11	2	1
Suburban location (ie close to town/city but living outside a town/city)	347	57	28	13	1	1
Village/rural location	150	62	26	7	3	2
Working status:						
Employed/self-employed	603	54	29	12	2	2
Employed	543	53	30	13	2	3
Employee full-time (30+ hours/week)	402	50	32	14	2	2
Employee part-time (less than 30 hours/week)	141	64	23	9	1	3
In full-time education	94 *	61	26	13	0	1
Retired/not working for any other reason	218	72	21	5	0	1
Not working for any other reason	147	67	24	7	1	1
Socio-economic group:						
B	150	53	31	11	3	2
C1	283	52	28	17	1	2
C2	208	66	23	7	1	3
D	125	66	23	7	1	2
E	83 *	67	27	4	1	1
AB	216	55	31	10	2	1
C12	491	58	26	12	1	2
DE	208	67	25	6	1	2
ABC1	499	53	29	14	2	2
C2DE	416	66	24	6	1	3
Highest level of qualification:						
No formal qualification/GCSE/ O-level or equivalent	279	71	22	5	0	1
GCSE/O-level or equivalent	241	71	23	5	0	1
AS/A-level or equivalent	162	53	33	9	1	3
Vocational qualification (eg NVQs, BTEC etc)/Further qualification (HNC, HND etc)	195	59	26	9	2	4
Vocational qualification (eg NVQs, BTEC etc)	128	59	24	9	2	5
University degree/doctorate level or professional equivalent	261	50	30	17	2	1
University degree (including undergraduate and master's degrees)	244	49	31	16	2	1
Gross annual household income:						
Under £15,500	194	67	24	6	2	1
£15,500 - 24,999	184	61	23	10	1	4
£25,000 - 49,999	311	58	28	10	1	3
£50,000 or over	151	47	34	17	2	0
Don't know/Rather not say	75 *	64	23	9	3	1

Housing situation:						
My home is being bought on a mortgage	336	49	35	13	1	2
My home is owned outright	210	74	18	5	1	2
My home is rented from a Local Authority	92 *	71	17	9	2	1
My home is rented from a private landlord	179	53	27	16	2	2
My home is rented from a housing association	81 *	64	27	5	0	4
Presence of own children:						
Aged 5 and under	132	57	27	12	2	2
Aged 6-12	182	58	28	11	1	2
Aged 13-17	160	64	28	5	1	1
Aged 13-15	107	64	29	5	2	1
Aged 16-17	86 *	62	33	5	0	1
Aged 18+	117	65	24	8	0	3
I am not the parent/guardian of any children in my household	501	59	26	11	2	2
Parent (of under-18s):						
Parent (of under-18s)	343	59	29	9	1	1
Other	572	60	25	11	1	3
Parent (of under-16s):						
Parent (of under-16s)	308	58	30	9	2	1
Other	607	60	26	11	1	2
Parent status UK:						
Mothers – Parent (of under-16s)	158	68	24	7	0	1
Fathers – Parent (of under-16s)	150	48	35	12	3	1
Household size:						
1	127	62	24	9	2	3
2	244	59	27	12	2	1
3	217	61	22	12	2	3
4	210	54	34	10	1	2
5 or more	117	63	27	8	0	2
Current marital status:						
Non-Married	390	60	27	11	1	2
Single/Separated/Divorced/ Widowed	390	60	27	11	1	2
Single	323	59	26	12	1	2
Married/Civil Partnership/Living As Married	525	59	27	10	2	2
Financial situation:						
Healthy - I have money left at the end of the month for a few luxuries or to add to my savings	205	59	27	9	3	2
OK - I get by, but there's not a lot left by the time the basics are taken care of	433	57	29	12	1	1
Tight - I'm making ends meet, but only just	197	67	23	8	0	2
Struggling / In trouble	80 *	56	24	10	3	8
Generations:						
Millennials (16-35)	431	54	29	14	1	2
Millennials (younger) (1990-99)	208	55	27	15	1	1

(16-25)						
Millennials (older) (1980-89) (26-35)	223	54	30	13	1	2
Generation X (1965-79) (36-50)	269	58	28	10	3	2
Baby Boomers(1946-64) (51-69) /Swing Generation/World War II (1945 or before) (70+)	215	71	22	4	0	3
Baby Boomers (1946-64) (51-69)	192	69	23	4	0	3

* Small sub-sample (75-100)
SOURCE: LIGHTSPEED GMI/MINTEL

Medium or rare beef burger consumption

FIGURE 43: EATING MEDIUM OR RARE BEEF BURGERS FROM FOODSERVICE VENUES IN THE LAST TWO WEEKS, OCTOBER 2015

"Have you eaten a medium or rare beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 2 weeks?"

Base: 915 internet users 16+ who have eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months

	ALL
	%
Yes	26
No	74

SOURCE: LIGHTSPEED GMI/MINTEL

FIGURE 44: EATING MEDIUM OR RARE BEEF BURGERS FROM FOODSERVICE VENUES IN THE LAST TWO WEEKS, BY DEMOGRAPHICS, OCTOBER 2015

"Have you eaten a medium or rare beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 2 weeks?"

Base: 915 internet users 16+ who have eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months

	All	Yes	No
	N	%	%
Total	915	26	74
Gender:			
Male	494	28	72
Female	421	24	76
Age:			
16-24	188	32	68
16-34	402	35	65
16-44	593	32	68
25-34	214	38	62
35-44	191	24	76
45-54	177	21	79
45-64	272	17	83
45+	322	16	84
55+	145	9	91
Gender by age:			

Male 16-24	103	35	65
Male 25-44	210	36	64
Male 45-64	150	15	85
Male 45+	181	14	86
Female 16-24	85 *	29	71
Female 25-44	195	26	74
Female 45-64	122	20	80
Female 45+	141	17	83
Region:			
Scotland and the North	207	23	77
Yorkshire & Humberside	70 *	23	77
The Midlands	156	29	71
Inner & Greater London	163	34	66
South East/East Anglia	209	25	75
South West/Wales	110	19	81
Area:			
Urban location (ie living in a town/city)	418	32	68
Suburban/village/rural	497	21	79
Suburban location (ie close to town/city but living outside a town/city)	347	24	76
Village/rural location	150	14	86
Working status:			
Employed/self-employed	603	31	69
Employed	543	31	69
Employee full-time (30+ hours/week)	402	34	66
Employee part-time (less than 30 hours/week)	141	21	79
In full-time education	94 *	29	71
Retired/not working for any other reason	218	11	89
Not working for any other reason	147	14	86
Socio-economic group:			
B	150	31	69
C1	283	28	72
C2	208	25	75
D	125	20	80
E	83 *	11	89
AB	216	32	68
C12	491	27	73
DE	208	16	84
ABC1	499	30	70
C2DE	416	21	79
Highest level of qualification:			
No formal qualification/GCSE/O-level or equivalent	279	19	81
GCSE/O-level or equivalent	241	19	81
AS/A-level or equivalent	162	30	70
Vocational qualification (eg NVQs, BTEC etc)/Further qualification (HNC, HND etc)	195	21	79
Vocational qualification (eg NVQs, BTEC etc)	128	18	82
University degree/doctorate level or professional equivalent	261	34	66
University degree (including undergraduate and master's degrees)	244	35	65
Gross annual household income:			
Under £15,500	194	25	75
£15,500 - 24,999	184	28	72
£25,000 - 49,999	311	25	75
£50,000 or over	151	31	69
Don't know/Rather not say	75 *	17	83

Housing situation:			
My home is being bought on a mortgage	336	27	73
My home is owned outright	210	20	80
My home is rented from a Local Authority	92 *	26	74
My home is rented from a private landlord	179	30	70
My home is rented from a housing association	81 *	26	74
Presence of own children:			
Aged 5 and under	132	31	69
Aged 6-12	182	33	67
Aged 13-17	160	28	72
Aged 13-15	107	30	70
Aged 16-17	86 *	27	73
Aged 18+	117	17	83
I am not the parent/guardian of any children in my household	501	24	76
Parent (of under-18s):			
Parent (of under-18s)	343	30	70
Other	572	23	77
Parent (of under-16s):			
Parent (of under-16s)	308	31	69
Other	607	23	77
Parent status UK:			
Mothers – Parent (of under-16s)	158	25	75
Fathers – Parent (of under-16s)	150	37	63
Household size:			
1	127	24	76
2	244	22	78
3	217	26	74
4	210	28	72
5 or more	117	32	68
Current marital status:			
Non-Married	390	26	74
Single/Separated/Divorced/Widowed	390	26	74
Single	323	28	72
Married/Civil Partnership/Living As Married	525	26	74
Financial situation:			
Healthy - I have money left at the end of the month for a few luxuries or to add to my savings	205	35	65
OK - I get by, but there's not a lot left by the time the basics are taken care of	433	26	74
Tight - I'm making ends meet, but only just	197	18	82
Struggling / In trouble	80 *	23	78
Generations:			
Millennials (16-35)	431	34	66
Millennials (younger) (1990-99) (16-25)	208	34	66
Millennials (older) (1980-89) (26-35)	223	34	66
Generation X (1965-79) (36-50)	269	24	76
Baby Boomers(1946-64) (51-69) /Swing Generation/World War II (1945 or before) (70+)	215	12	88
Baby Boomers (1946-64) (51-69)	192	14	86

* Small sub-sample (75-100)
SOURCE: LIGHTSPEED GMI/MINTEL

Appendix - Beef Burger Foodservice Consumer Survey

Separator slide: We'd now like to change the subject slightly and ask you about eating beef burgers from restaurants, fast food venues/vans, pubs and takeaways.

Ask all aged 16+

Q36. Have you eaten a beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 3 months? [Single code]

[1] Yes
[2] No
[3] Don't know

All who code 1 in Q36 (foodservice beef burger eaters)
All who code in 2-3 at Q36 go to separator slide 5

Q37 From which of the following venues have you eaten beef burgers in the last 3 months?
Please select all that apply. [**Multicode, randomize 1-5 but keep 2 and 3 together]**

[1] Fast food outlet (eg McDonald's, Burger King, kebab shop)
[2] Gourmet burger outlet (eg GBK, Byron)
[3] Other restaurant (eg Bella Italia, Café Rouge)
[4] Pub
[5] Street food van (eg burger van)
[6] Other foodservice venue **[Please specify] [Anchor]**

All from Q37 go to Q38 (foodservice beef burger eaters)

Q38. Thinking about your perfect beef burger, how would you prefer to have it cooked?
Please select one. **[Single code]**

[1] Well-done (cooked through)
[2] Medium (possible pink streaks inside)
[3] Medium-rare (pink in the middle)
[4] Rare (pink/red in the middle)
[5] I don't have a preference

All from Q38 to Q39

Q39. Why do you prefer to have your beef burgers cooked [insert pipe from Q38 – ensure to decapitalise the first letter. If coding in 5 – 'Why do you not have a preference about how your beef burgers are cooked]? [Open ended question]

All from Q39 to Q40

Q40. Have you eaten a medium or rare beef burger from a restaurant, fast food venue/van, pub or takeaway in the last 2 weeks? *Please select one*. **[Single code]**

[1] Yes
[2] No