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# 'Posh Poultry': The Rise Of Premium Fast Food

Mintel and Snoop Spendmapper data reveals that premium fast food is rapidly gaining popularity among higher-income Brits, highlighting key consumer trends and spending shifts that fast food businesses must understand to stay competitive.





# Introduction

Fast food has long been perceived as a quick and affordable meal option, but a new trend is reshaping the industry. Premium fast food is seeing exponential growth, particularly among higher-income Brits, signalling an important shift in consumer behaviour and spending habits.

Using Mintel and Snoop's SpendMapper data, we can analyse consumer data and spending patterns to identify what's happening, why and what's next for this segment of the market.

If you're a fast food business owner or planning to enter the industry, understanding this boom is crucial to capturing the right audience and staying ahead in a highly competitive market.



# Fast Food Busts The 'Cheap And Cheerful' Myth

The UK fast food industry, valued at £38 billion in 2024, is poised for significant growth, and is expected to reach nearly £50 billion by 2030<sup>1</sup>. A key factor driving this expansion is the growing demand for premium fast food options. Research from Mintel and Snoop's SpendMapper shows that wealthier Brits are leading this shift.

## INCREASING FREQUENCY

# 46%

of UK adults with a household income of £75k+ dined at fast food restaurants more than once in April 2025 — up from 36% in April 2023 — showing growing preference among wealthier consumers<sup>2</sup>.

## FAST-FOOD HABITS

# 53%

of higher-income British fast food consumers order from chicken shops, compared to just 38% of the overall fast food-consuming population<sup>3</sup>.

## HIGHER SPEND

# £352

is the average annual fast food spend of consumers with a personal income of £100k+, compared to the overall average of £333<sup>4</sup>.

<sup>1</sup>Source: Mintel's Fast Food Restaurants - UK, 2024 Report

<sup>2</sup>Source: Mintel's Leisure Outlook - UK, Spring 2025 Report

<sup>3</sup>Source: Mintel's Fast Food Restaurants - UK, 2024 Report

<sup>4</sup>Source: Snoop SpendMapper



The growing demand for premium fast food highlights a broader trend in the hospitality industry, where consumers are prioritising quality over quantity. People are dining out less frequently than in the past, meaning they want to ensure they have a great experience when they do. Premium fast food provides the perfect balance—offering a satisfying, indulgent meal while remaining more affordable than casual dining spots like Nando's or Pizza Express.

As gourmet fried chicken chains continue to expand across the UK, competition in the market is set to heat up.

To stand out, brands will need to captivate consumers with bold, innovative flavours that appeal to today's adventurous palates. Diners will increasingly expect dynamic menus featuring rotating options and customisable spice levels, allowing them to tailor items like wings, tenders, and burgers to their personal tastes. Mintel's research shows that young and affluent consumers are more likely to choose restaurants that offer unique flavour combinations and spicier foods<sup>5</sup>.

<sup>5</sup>Source: Mintel's Menu Trends – UK, Spring/Summer 2025 Report



# Gourmet Fried Chicken Chains Attract Higher Spends

Data from Snoop's SpendMapper demonstrates that premium fast food players are commanding higher average spends per transaction compared to mainstream fast food chains:

- Wingstop, Slim Chickens, and Wingers show average transaction values of £18.97, £18.96, and £15.80, respectively<sup>6</sup>.
- Meanwhile, traditional players like McDonald's and KFC record significantly lower averages of £10.07 and £13.82<sup>7</sup>.

Whilst people visit the likes of Wingstop and Slim Chickens less frequently than they do KFC<sup>8</sup>, they are willing to spend notably more for a perceived upgrade in quality of ingredients, experience and variety.

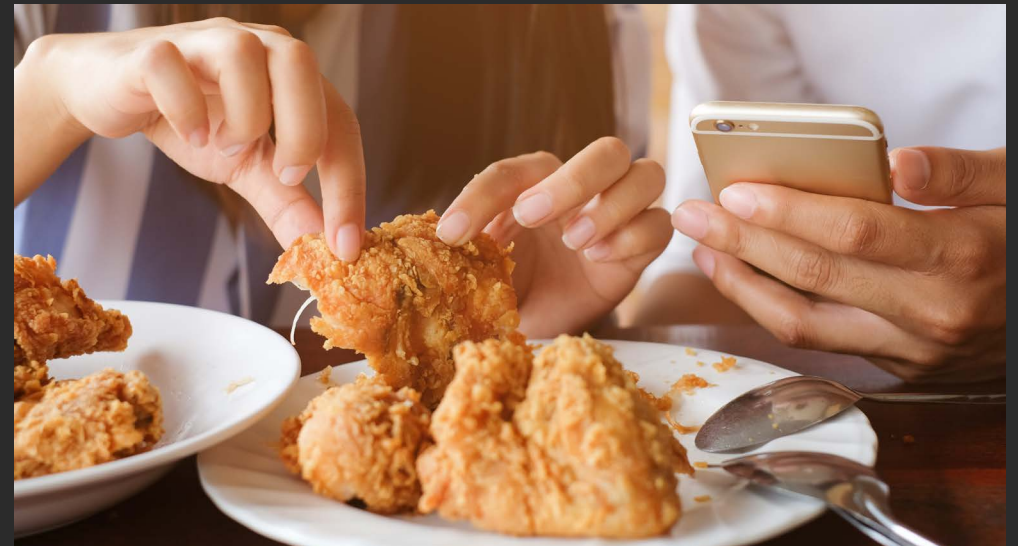
This speaks to consumers' demand for an indulgent 'cheat day', whether to cap off a long week or as a reward after an intense workout. Despite growing health consciousness, people aren't shying away from indulgent dining experiences, and for many, a post-workout treat is seen as a well-earned reward. According to Snoop data, customers of Wingstop and Slim Chickens spend a higher proportion of their outgoings with fitness brands, such as gyms and leisure centres<sup>9</sup>.

The next challenge for fast food brands is to deliver guilt-free indulgence, by creating menus that satisfy diners without using up all their calories. Promoting dishes with high protein content will also resonate with young British consumers, as in March 2025 34% of 16-34s said that high-protein foods are one of their three most important factors when shopping for food, up from 19% in July 2020<sup>10</sup>.

<sup>6</sup>Source: Snoop SpendMapper | <sup>7</sup>Source: Snoop SpendMapper

<sup>8</sup>Source: Snoop SpendMapper | <sup>9</sup>Source: Snoop SpendMapper

<sup>10</sup> Source: Mintel's Global Consumer, Food and Drink, March 2025





# US Challenger Brands Are Expanding Rapidly

Premium-quality chicken chains are carving out a significant slice of the fast food market, and seeing their customer bases skyrocket:

- Wingstop experienced a staggering 71.6% rise in customers over the past 12 months. Its typical customer is 30 years old, a good 10 years younger than the average KFC customer<sup>11</sup>.
- Slim Chickens followed closely, seeing a robust 34.3% increase in customers, while maintaining strong appeal among younger demographics<sup>12</sup>.

- Popeyes continues to establish itself in the UK fast food market, recording a 17.3% increase in number of customers in the past year<sup>13</sup>.

These numbers stand in sharp contrast to traditional fast food chains like KFC, which according to Snoop's SpendMapper recorded a decline of 1.9% in customer numbers in the last 12 months<sup>14</sup>. Clearly, premium chicken brands are successfully differentiating themselves and capturing the loyalty of younger, affluent diners.



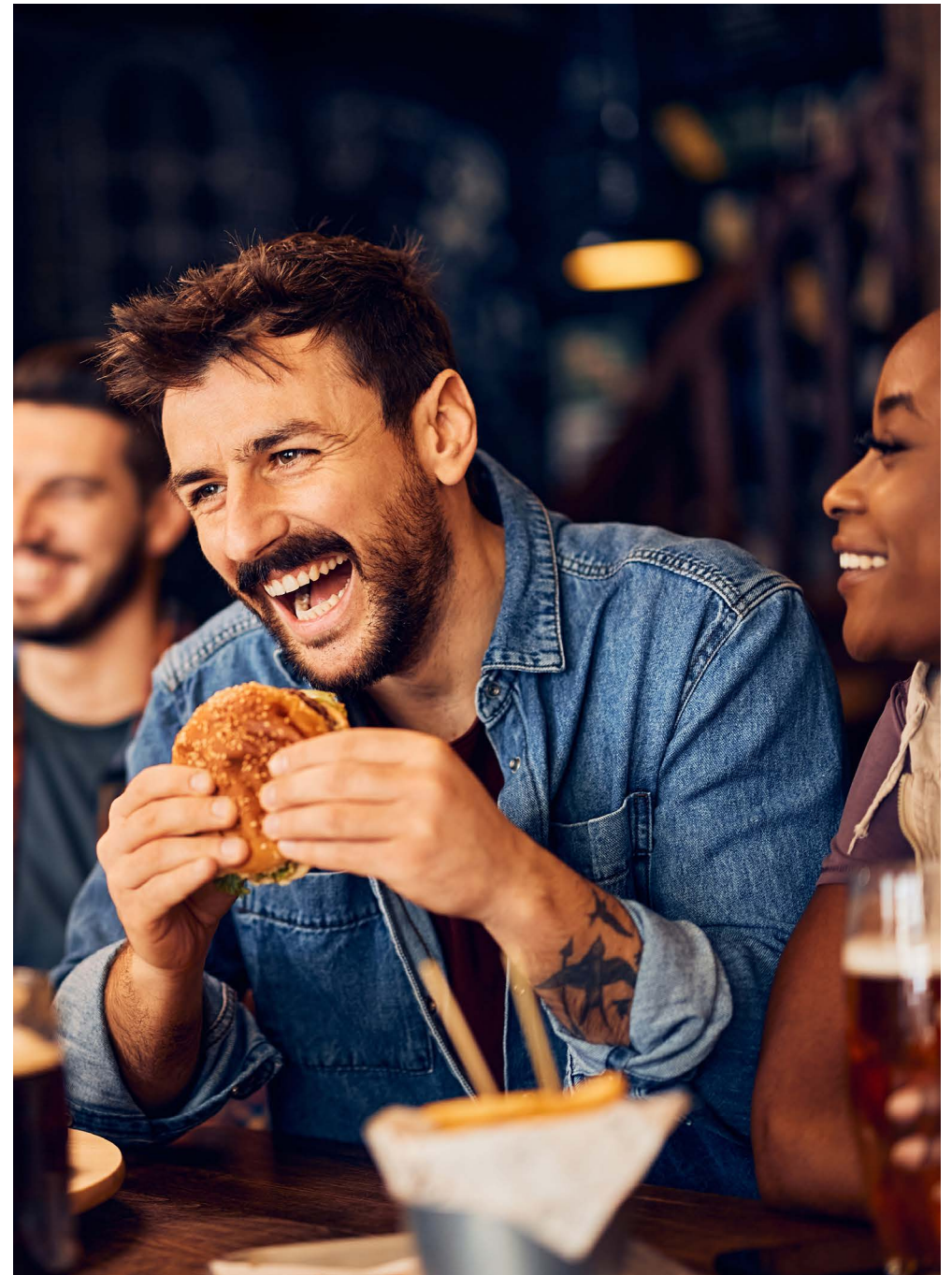
Social media has played a key role in the success of emerging fried chicken brands, as they look to replicate their popularity in the US this side of the Atlantic. 33% of 18-24 year olds say viral images and videos of appealing dishes on social media encourage them to try out a restaurant or takeaway<sup>15</sup>. Wingstop UK boasts over 870,000 TikTok followers, an impressive figure considering KFC UK, with approximately 50 times more locations, has 1.3 million followers.

Sharing experiences about visiting trendier fast food outlets has become an experience tied to one's identity, making young professionals gravitate towards premium brands as an extension of their lifestyle. Operators can leverage this by launching limited-edition menu items and running special events to go viral and generate FOMO among fans of fast food.

<sup>11</sup>Source: Snoop SpendMapper | <sup>12</sup>Source: Snoop SpendMapper

<sup>13</sup>Source: Snoop SpendMapper | <sup>14</sup>Source: Snoop SpendMapper

<sup>15</sup> Source: Mintel's Menu Trends - UK, Spring/Summer 2025 Report





# Strategies For Growth

The flourishing premium fast food segment offers a significant opportunity for businesses seeking to capitalise on evolving dining trends. Here's how your brand can stand out:

## 01 Deliver Guilt-Free Indulgence

Fast food brands should embrace the concept of "earned indulgence" to appeal to consumers seeking a balance between treating themselves and maintaining a health-conscious lifestyle. Position indulgent treats as a well-deserved reward, whether after a tough workout or a demanding week, aligning with the growing trend of mindful yet satisfying choices.

## 02 Be Bold With Flavour

Stand out with unique menu items that offer bold and exciting flavours, moving on from the success of dishes like buffalo chicken wings and loaded fries that have now hit the mainstream. Offer diners the chance to customise spice levels or try out alternative sauces and marinades.

## 03 Create FOMO

Appeal to younger demographics through social media campaigns that promote mouth-watering dishes, limited-edition menu items and special events. Create FOMO among followers to ensure they keep coming back.



# Mintel Predicts

## 1. Fast Food X Fitness:

Chicken shops will collaborate with gym brands and fitness influencers to introduce high-protein menu items, branded merchandise and tailored rewards. The recent tie-up between KFC and Gymshark to launch KFC Rice Bowls that offer a lighter, protein-packed option highlights the potential here. Premium chicken shop brands can take this idea further by introducing high-quality protein boxes, or by experimenting with alternative cooking methods such as air frying to appeal to health-conscious gym-goers.

## 2. The Establishment Fights Back:

Big fast food chains like KFC and McDonald's will increasingly turn to limited-edition items featuring bold, global flavours and high spice levels to make their menus more appealing and exciting to modern tastes. For instance, McDonald's could leverage its partnership with Frank's Hot Sauce by challenging diners to "turn up the heat" through selecting its Xtra Hot version.

## 3. Venturing Into Retail:

Emerging fried chicken operators will partner with FMCG brands to build their presence beyond social media, taking inspiration from Heinz x Morley's Fried Chicken Sauce. Dave's Hot Chicken is renowned for its dipping sauce, which is a category ripe for innovation.





## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster. Our purpose is to help businesses and people grow.

