

Chicken shops and poor diets

Summary of research findings

Shift

Formerly
We Are What We Do

Contents

Introduction

Existing research

Behavioural observation

Surveying young people

Local environment mapping

Ethnography

Chicken shop business profiling

Conclusions

Contact

Introduction: Chicken shops and poor diets

The research described in this document was undertaken by Shift (formerly known as We Are What We Do) in the exploratory phase of a product/service development process aiming at addressing the poor diets of many young people in low income urban areas in the UK.

During this phase we:

- Undertook a brief review of the existing literature on the relationship between fast food, poor diets and youth obesity
- Conducted a behavioural observation in chicken shops in Forest Gate, London Borough of Newham
- Mapped the food outlets around train stations in two low income urban areas, one in Newham, London and one in Handsworth, Birmingham.
- Asked young people in a Newham school about their fast food intake and preferences through two workshops and a survey
- Undertook ethnography with young people in Birmingham who regularly eat at chicken shops
- Interviewed the owners and managers to two London chicken shop chains

This research led to the development of the mobile healthy fast food pilot, Box Chicken, in Forest Gate, Newham, which ran for four weeks during September and October 2013. The insights documented in this report continue to inform the practical work we are doing to improve poor diets in low income urban areas.

For more information, see shiftdesign.org.uk
Contact ella.wiggans@shiftdesign.org.uk

MEALS
£3.50

£19.99

FISH BURGER
VEGGIE BURGER
DONER BURGER
1/4 POUNDER
WITHOUT DRINK £



HOT FRESH

Chick

Existing Research

To understand what influenced young people's eating habits, particularly the relationship between fast food, poor diets and youth obesity, we did desk research, collating existing information from studies on youth obesity, income levels, and fast food in the UK and the US.

We also looked more closely at the fast food environment in the London Borough of Newham, which is a good example of a low-income urban area with high incidence of youth obesity.

The rise of the chicken shop

There are more than 8,000 fast food outlets in the capital alone - one for every 1,000 Londoners

Greater London Authority data analysis (November 2012)

Fried chicken sales grew by 36% from 2003 to 2008, and the market continues to grow. The fried chicken market is estimated to be worth £15bn-£20bn.

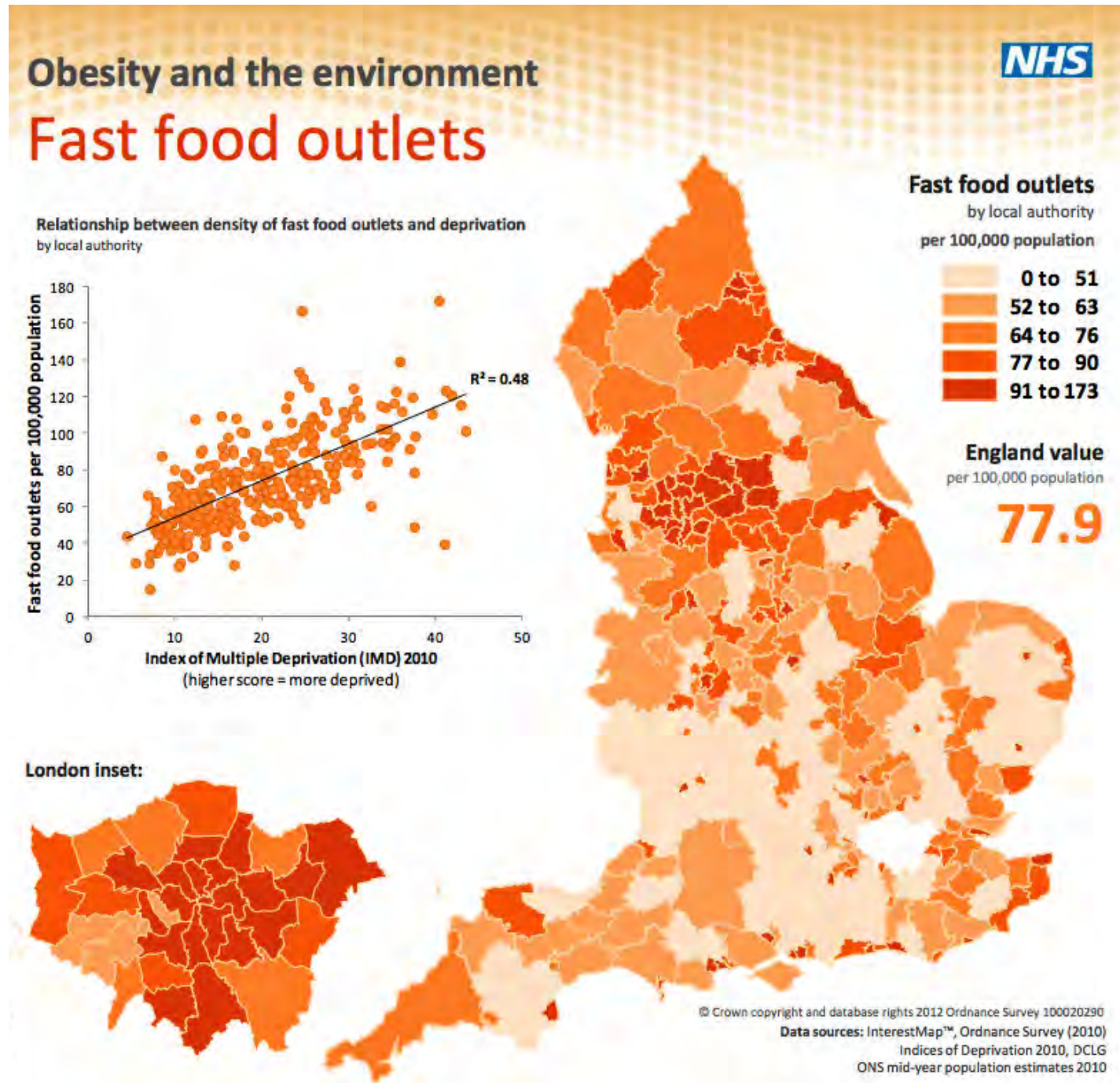
Meltzer, T (2011) Britain's fried chicken boom, *The Guardian online*

Independent fast food shops make up around four-fifths of the market

Allegra (2009) Eating Out in the UK.

Prevalence in deprived urban areas

The poorest areas have the highest numbers of fast food outlets



Prevalence in deprived urban areas: the example of Newham

**In Newham there are 258 hot food
takeaway outlets.**

28% are fried chicken shops

Chinese, Indian, Kebab 10-15% each

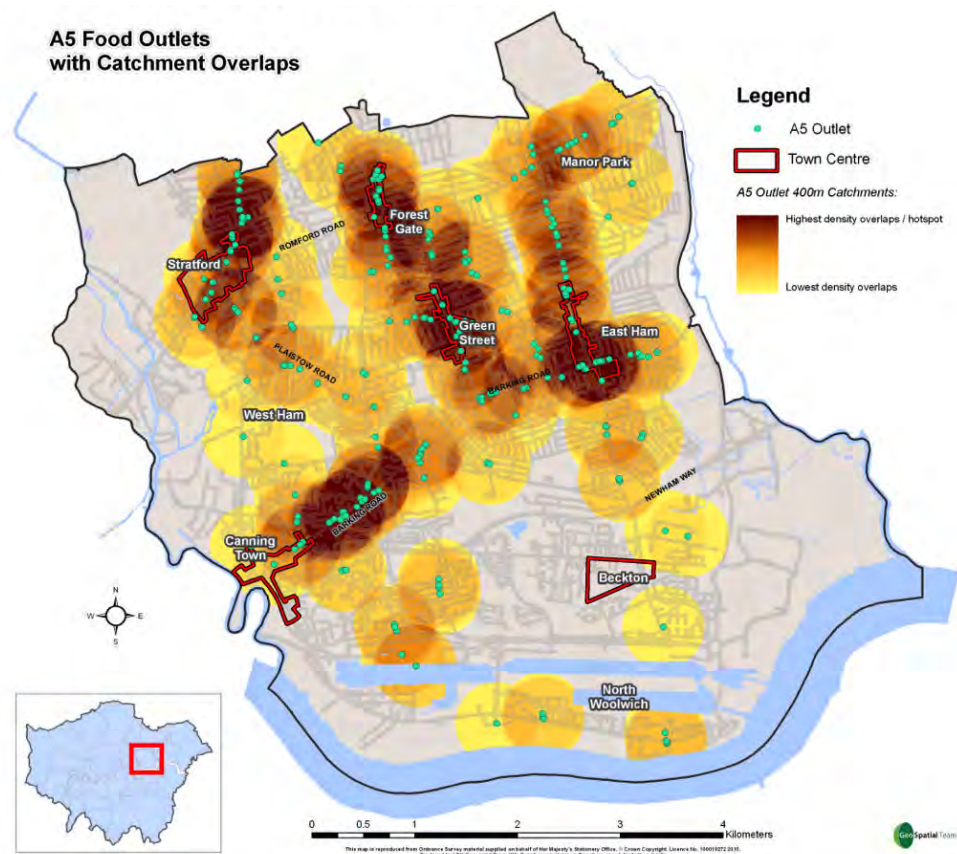
Newham Council (2010) Food Outlet Mapping in the London Borough of Newham

**All secondary schools are within 500m
of at least one takeaway**

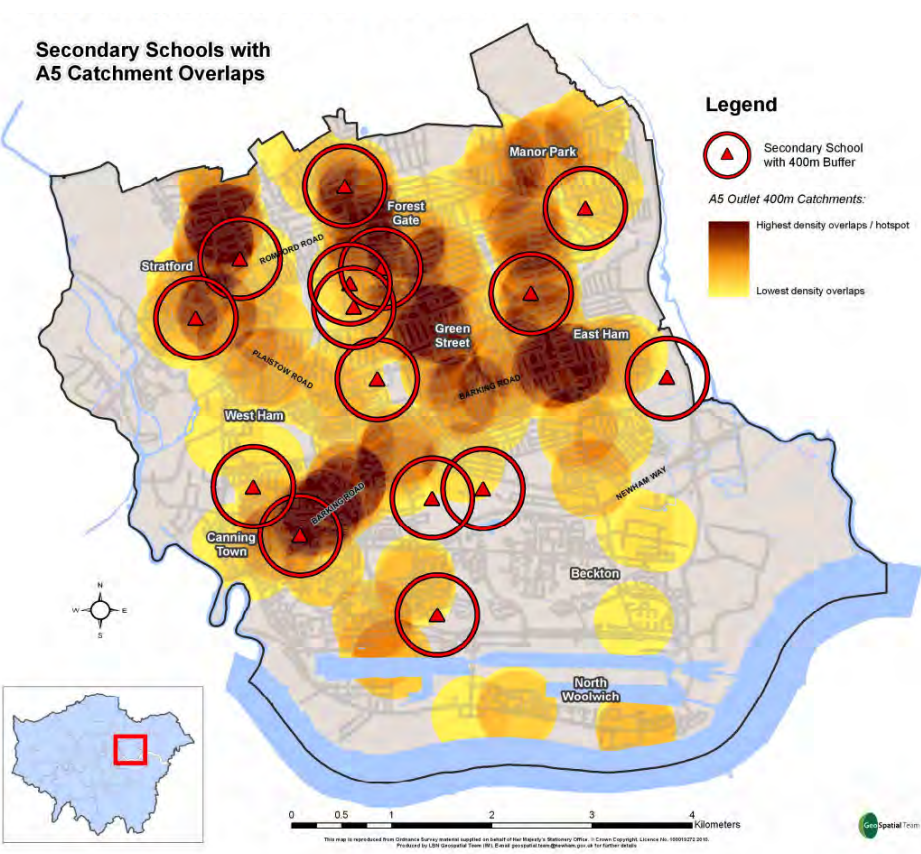
Newham Council (2010) Food Outlet Mapping in the London Borough of Newham

Prevalence in deprived urban areas: the example of Newham

Clustering of hot food takeaways, Newham



Clustering of hot food takeaways and secondary schools, Newham



Newham Council (2010) Food Outlet Mapping in the London Borough of Newham

Obesity and young people nationally

Around 30% of children and young people are overweight or obese

National Obesity Observatory (2013) NOO data fact sheet: Child weight

Obesity levels have tripled in 15 year-olds over the last ten years

Department for Environment, Food and Rural Affairs (2010) Views of UK health professionals on the value of the natural environment.

If no action is taken, 25% of children will be obese by 2050

Government Office for Science (2007) Tackling obesities: future choices

Impact of fast food

A fast food restaurant within 0.16km of a school is associated with at least a 5.2% increase in obesity rates amongst 15-16 year olds

Currie, J., DellaVigna, S., Moretti, E. & Pathania, V. (2009) The effect of fast food restaurants on obesity and weight gain.

An average meal at a chicken shop contains 60% RDA kcal, 45% RDA saturated fats and 85% RDA salt as well as significantly low levels of vitamins, minerals and fibre

Comparison of KFC website and NHS recommendations

RDA = Recommended Daily Allowance
kcal = kilocalories

Each additional purchase made at a fast food outlet is associated with a 0.03 increase in age-standardized body mass index.

De Vogli, R., Kouvonen, A. & Gimeno, D. (2013) The influence of market deregulation on fast food consumption and body mass index.

Nutritional value of fast food

The high-fat, energy-dense foods served in the fast food outlets that dominate the high streets around many schools contain high percentages of recommended daily allowances.

The next page provides nutritional information for selected KFC products.

Independent fast food outlets often serve meals with even higher energy content, as they use less sophisticated production techniques, and serve larger portions. Their oil is also frequently of a lower standard, with high levels of saturated and trans-fats.

Fries

362 kcal
17.4g fat
2.0g saturated fats
0.2g salt

Bucket of fried chicken

1577 kcal
65.5g fat
7.1g saturated fats
17.5g salt

Burger

654 kcal
29.6 g fat
5.6g saturated fats
4.07g salt

Large coke

46.2g sugar

RDA men

2500 kcal
30g sat fat
6g salt

RDA women

2000 kcal
20g, sat fat
6g salt

Behavioural observation

We spent time observing the behaviour of fast food consumers in three different takeaway outlets in Forest Gate in Newham, paying particular attention to chicken shops on Upton Lane and Woodgrange Road.

The aim of this research was to understand the behaviours of people in Forest Gate in and around chicken shops. Specifically, we aimed to understand:

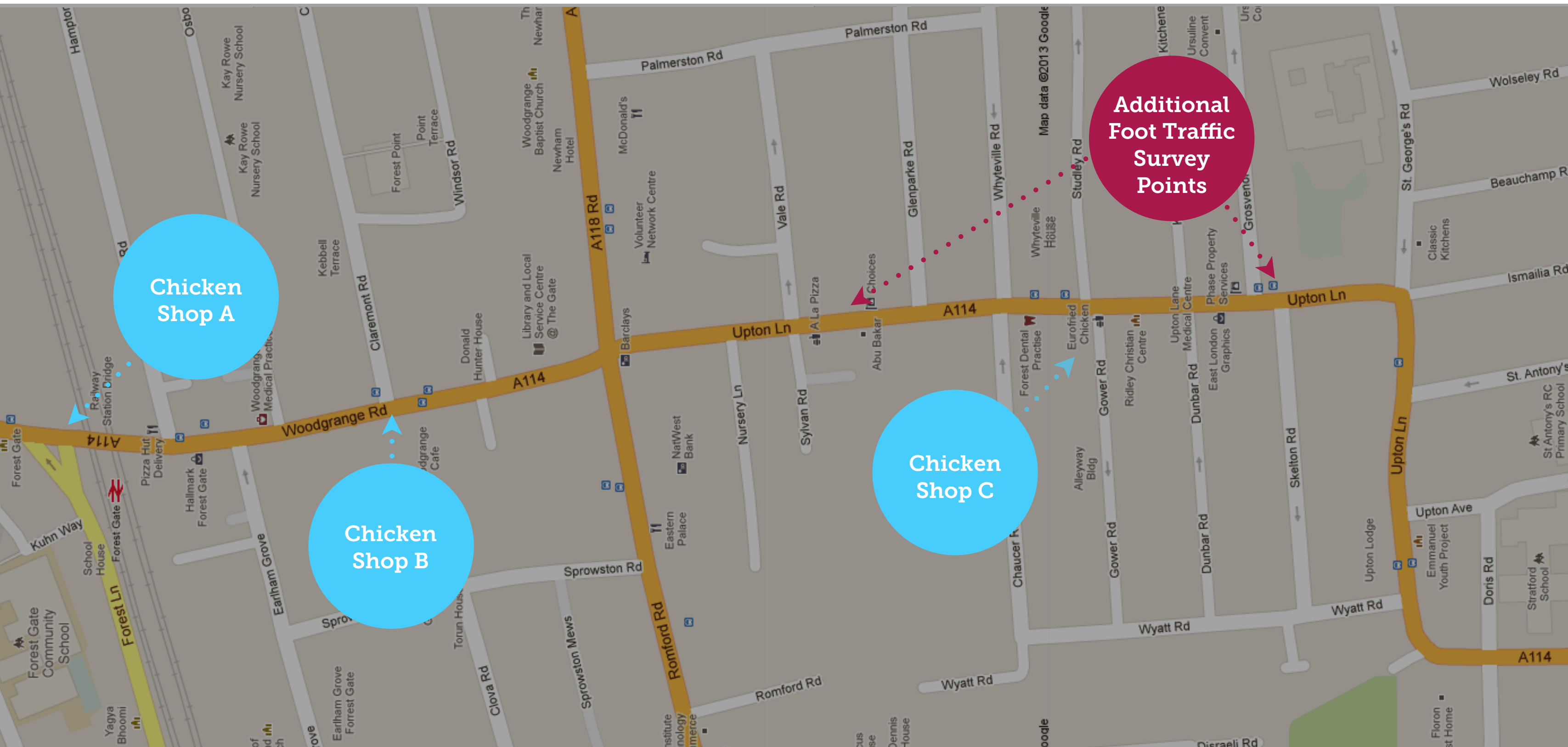
- Who visits chicken shops?
- When are they visiting?
- What are they buying and eating?
- How much do they spend?
- What are they doing?
- How long are they staying?

The shops were each observed on a weekday during the peak period between 11.00am and 4.30pm.

The profiles of the businesses were created from information noted from the menu boards, or taken from the shops' promotional materials.

122 customers were observed in total, of which 80 were also monitored for factors including entry time, exit time, items ordered, group size, price paid, approx. age, gender and category.

Location of chicken shops observed in Newham



Chicken Shop Spotlight: Chicken Shop A

Opening hours		Facilities	Packaging	Vegetarian options	✓
11.30am - 23.00pm Monday - Sunday		One bin Free condiments (communal, help your self bottles)	Cardboard boxes	Halal options	✓
				Seating	12
Distance to nearest bus stop		Shop size	Example menu items		
1 minute walk		5m x 6m	Not recorded		
Description	Small shop with some seating. Cans dirty and no water available in store. Friendly multilingual staff				

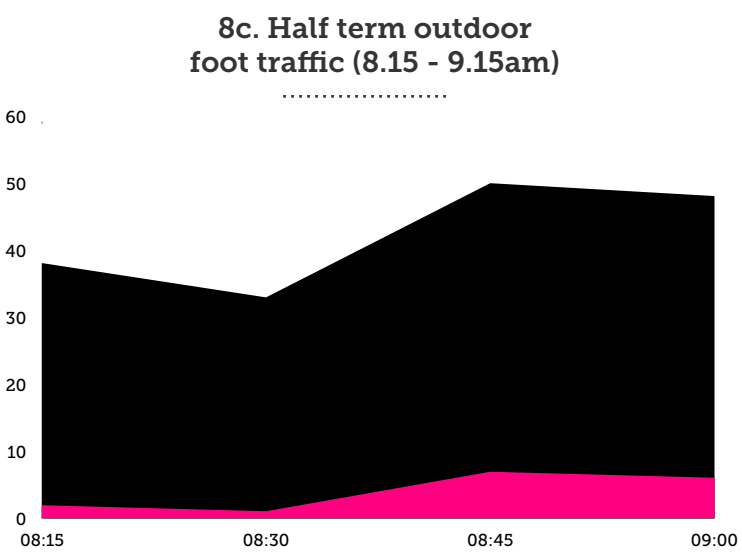
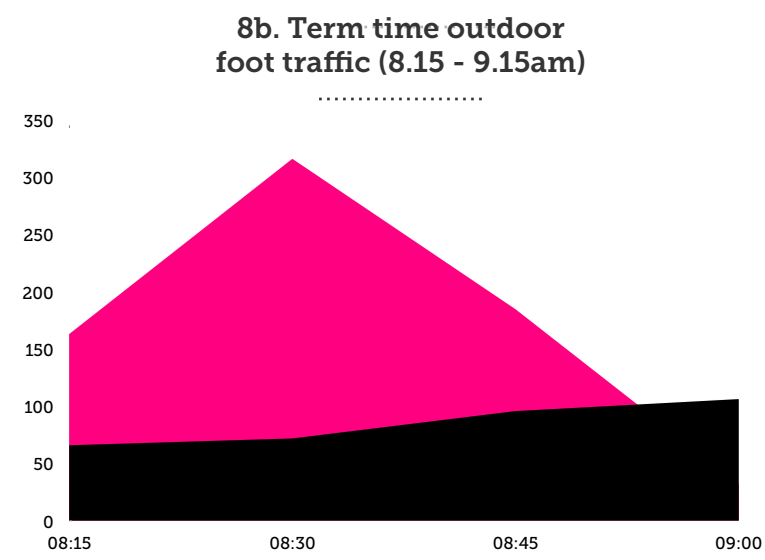
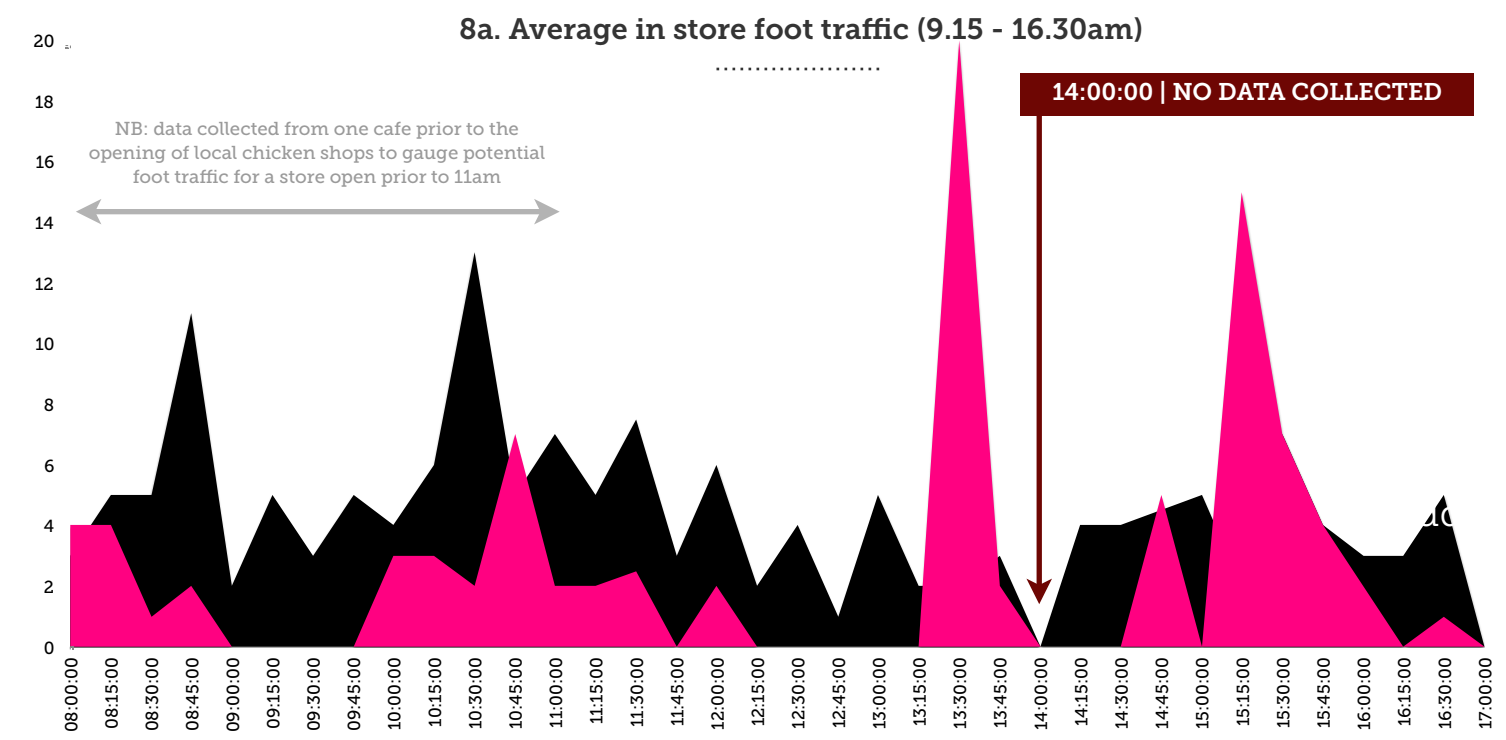
Chicken Shop Spotlight: Chicken Shop B

Opening hours	Facilities	Packaging	Vegetarian options	✓
11am - late Monday - Sunday	One bin Plugs Free condiments (communal, help your self bottles)	Cardboard boxes	Halal options	✓
			Seating	6
Distance to nearest bus stop	Shop size	Example menu items		
1 minute walk	6m x 10m			
Description	A clean, modern shop with with a seating capacity of 6 and a high number of friendly staff.			
		Chicken Strip Meal 2 Chicken + Chips Family Variety Meal Mini Variety Meal 9 Nuggets		

Chicken Shop Spotlight: Chicken Shop C

Opening hours		Facilities	Packaging	Vegetarian options ✓
11am - late Monday - Sunday		One bin Television Free condiments (communal, help your self bottles)	Burger wrappers Cardboard boxes	Halal options ✓
				Seating 25+
Distance to nearest bus stop		Shop size	Example menu items	
1 minute walk		10m x 15m		
Description	Large, relatively clean shop with a lot of seating and a television. Slightly understaffed with nice and friendly owner manning the counter.		<div><div></div><div>6 Wings Meal£2.49</div><div>2pc Chicken Meal£2.49</div><div>Beef Burger Meal£1.99</div><div>2 Chicken and 3 Wings Meal£2.99</div><div>1/2 Pounder Meal£3.99</div><div>7" Pizza Meal£2.00</div><div>7" Pizza Kids Meal£1.00</div><div>15" Margherita Pizza£4.99</div><div>Oreo Milkshake (Medium)£2.50</div><div>Chicken Tikka Roll£1.99</div></div>	

Peak times



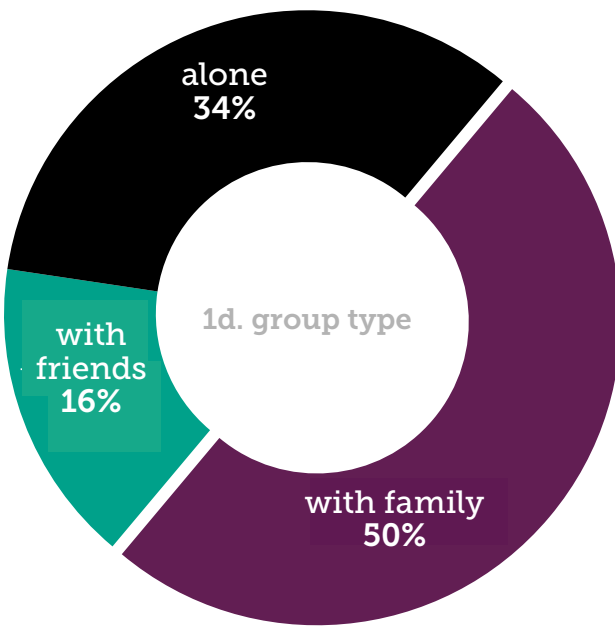
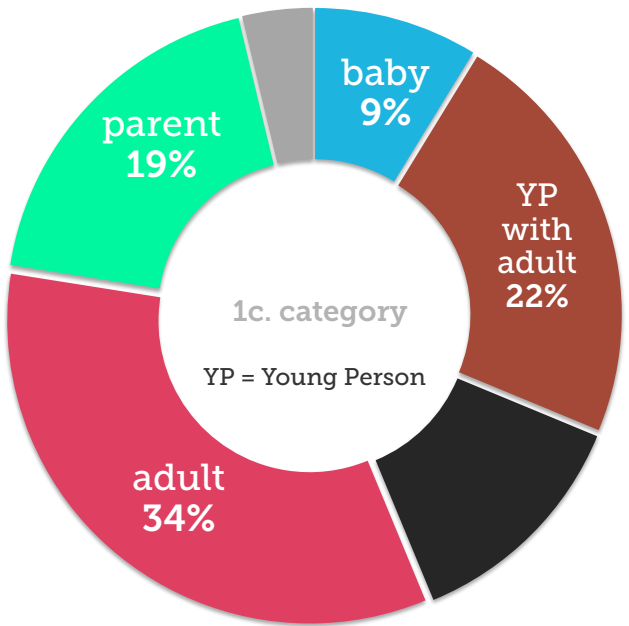
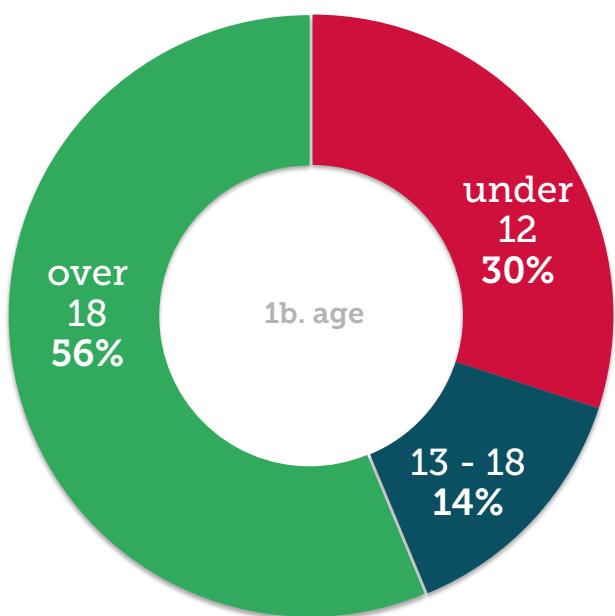
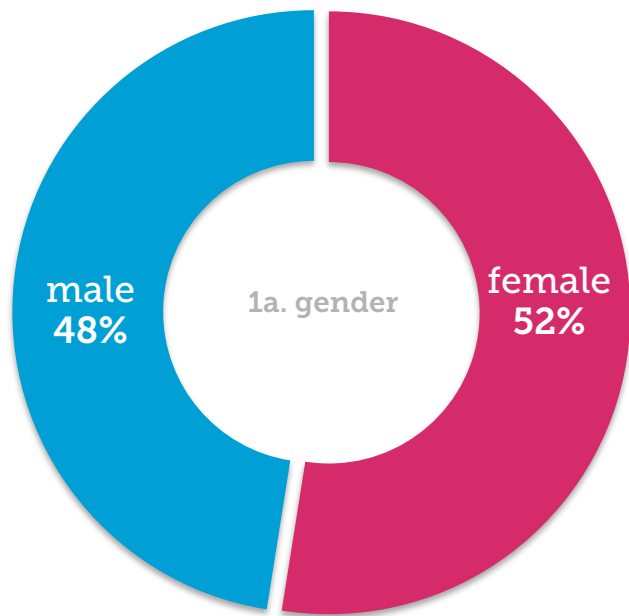
Additional key

- Adults
- Young people

Demographics

Nearly half of all visitors to the chicken shop were under 18

Visiting chicken shop
Sample size = 80



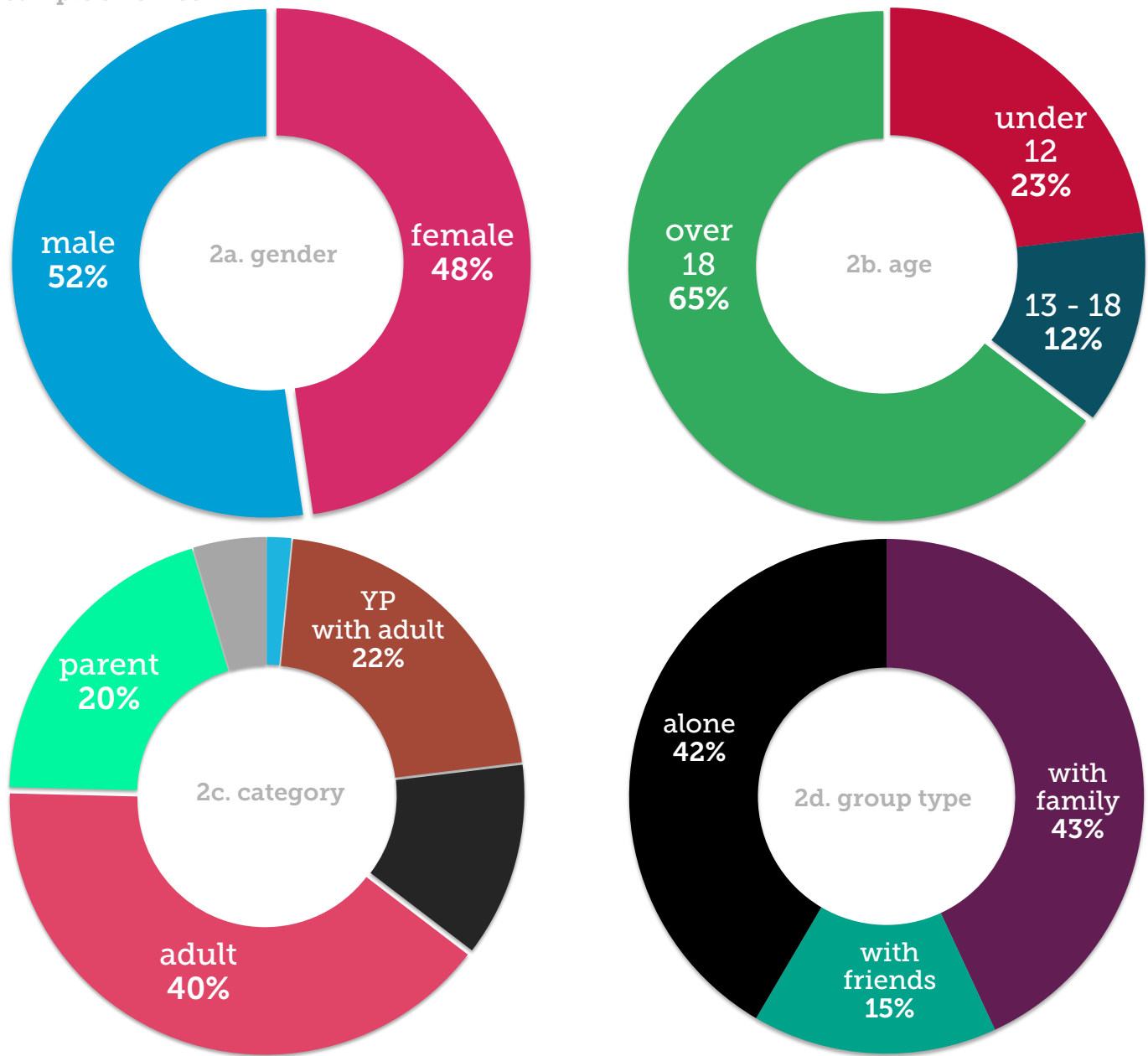
Additional key

Elderly (over 50)	5%
YP without adult	12%

Demographics

Not everyone who came to the shop ate there. A third of people eating in the shop were under 18.

Eating in chicken shop
Sample size = 65



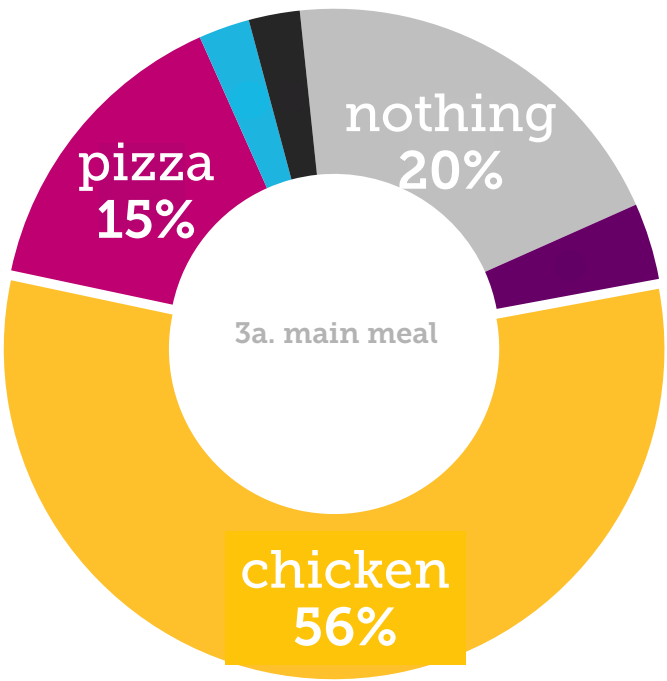
YP = Young Person

Additional key

Elderly (over 50)	5%
YP without adult	12%

Ordering behaviour

Chicken products were the most popular choice of food, and over half of people had chips with their meal.



Additional key

Kebab	2%
Order unknown	3%
Burger	4%



Additional key

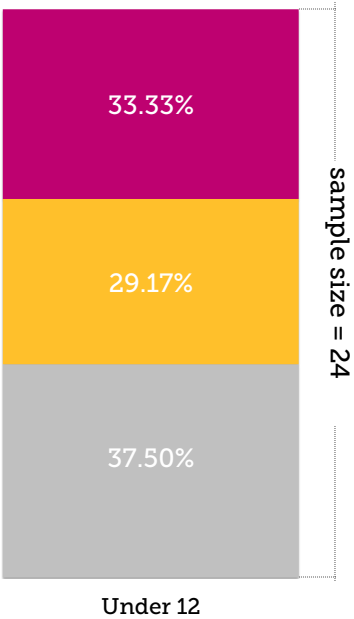
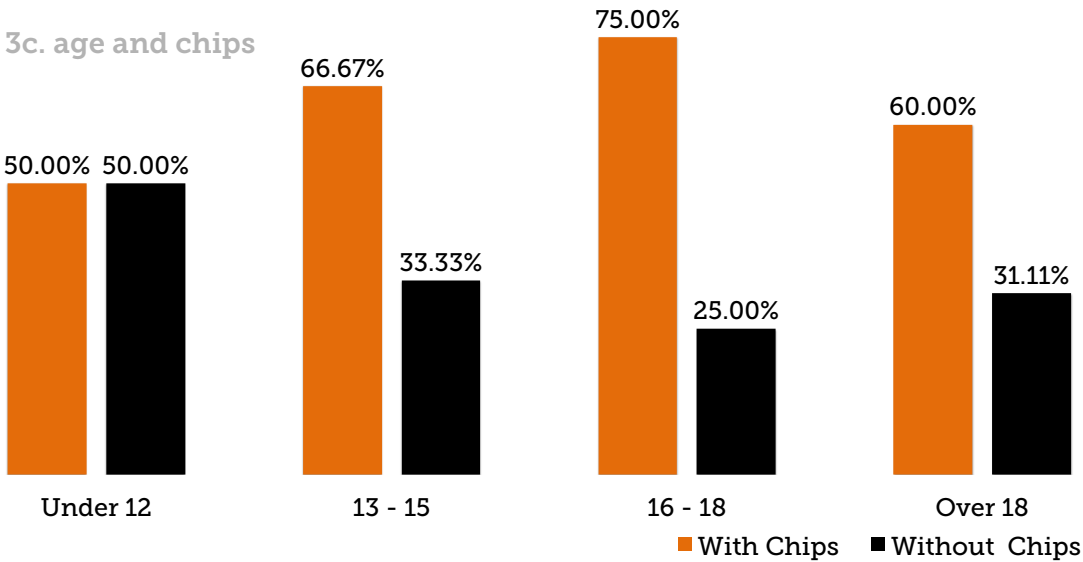
No drink order	9%
Other drink	1%

Ordering Behaviour

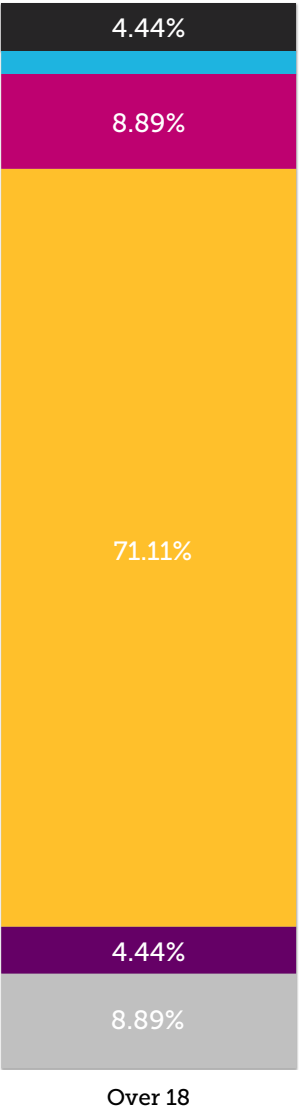
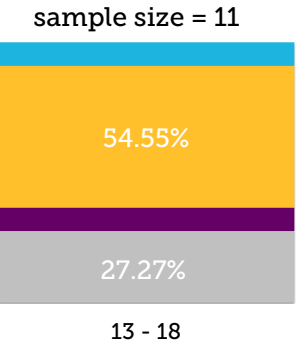
Chicken products were the most popular items for young people aged 13 – 18.

By age
Sample size = 80

3c. age and chips



3d. age and main order
sample size = 45



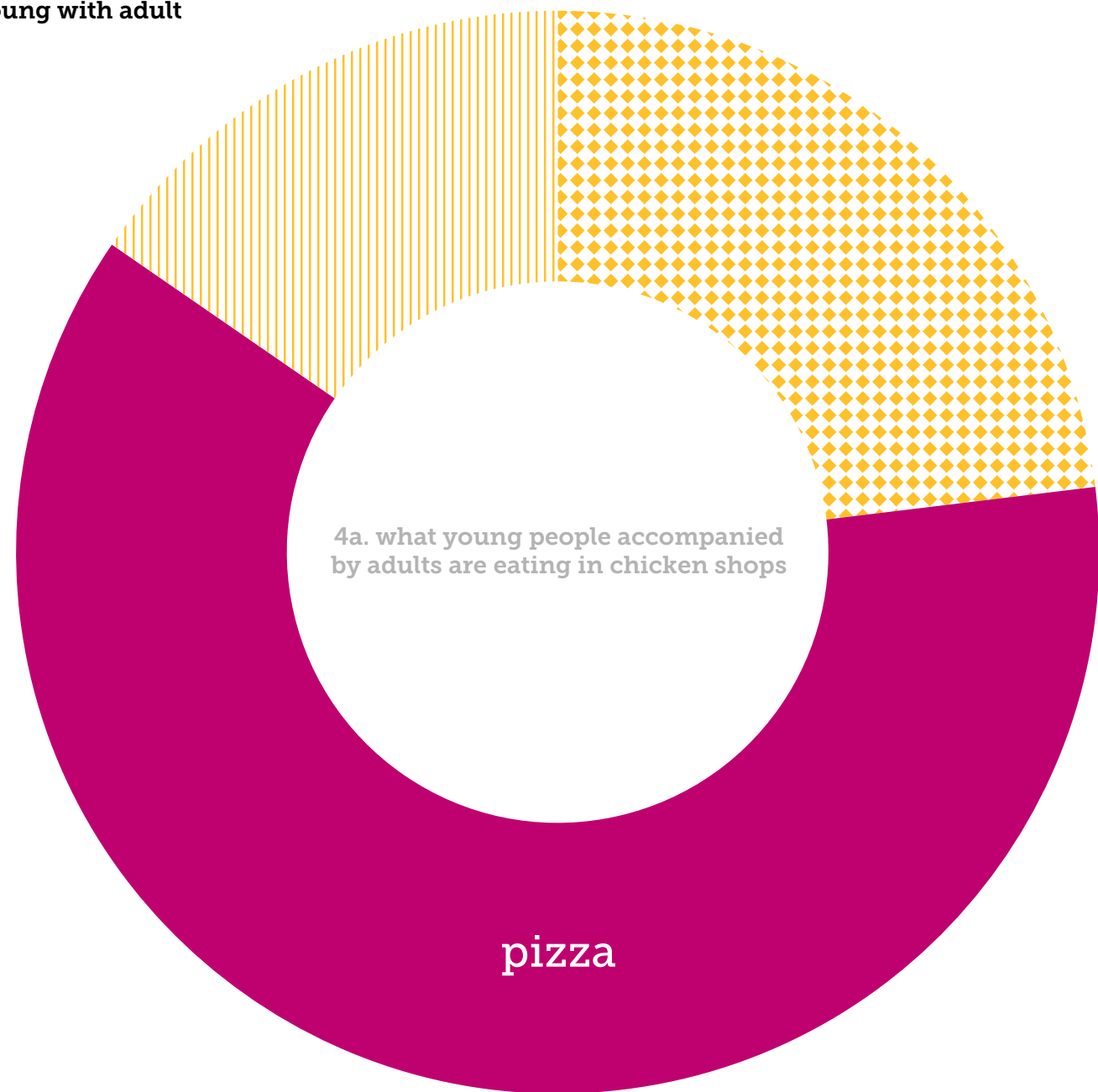
Additional key

- Nothing
- Burger
- Chicken
- Pizza
- Kebab
- Order unknown

Detailed ordering Behaviour

62% of young people who came to the shop with parents ordered pizza

Young with adult



Additional key

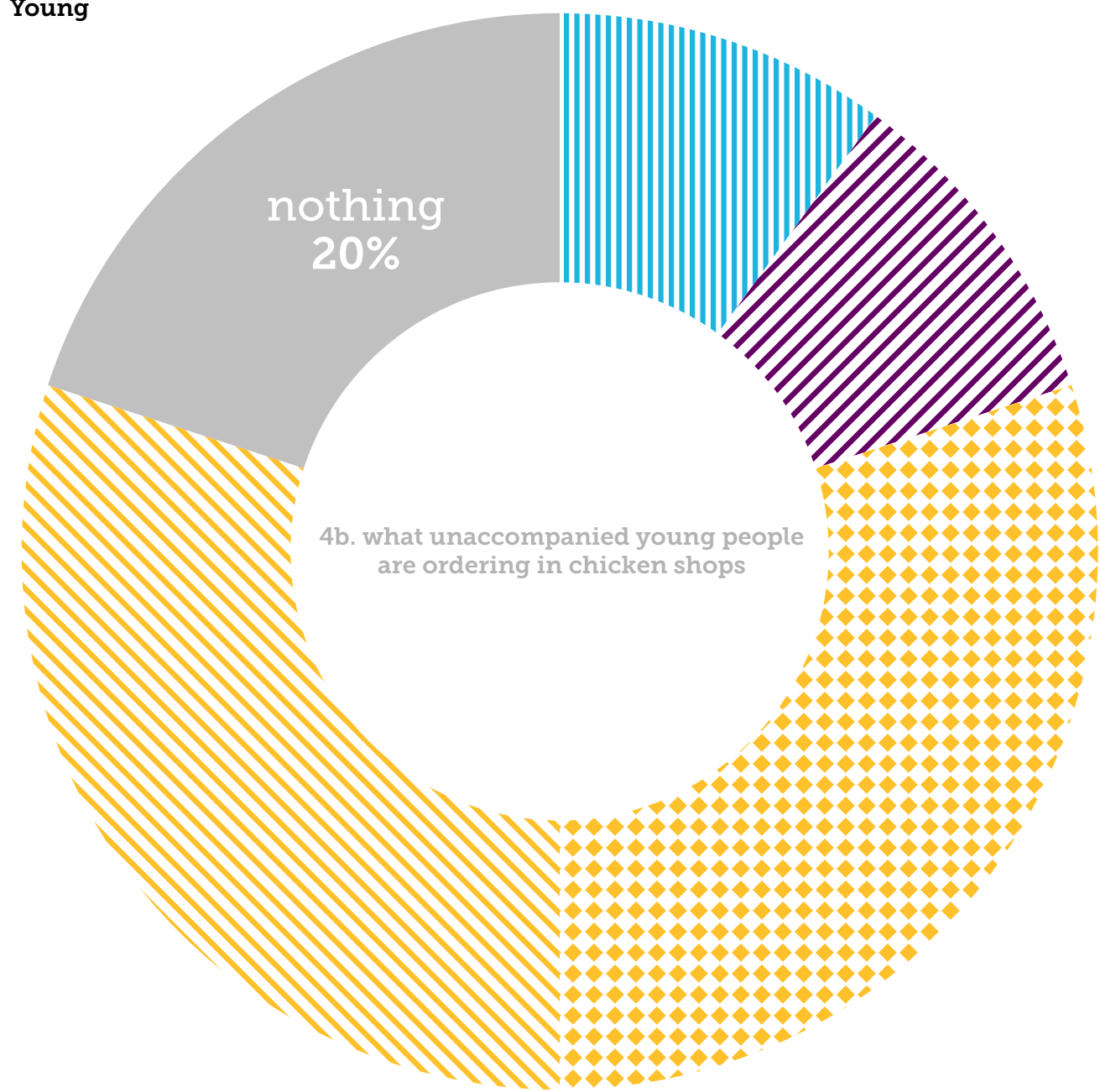
Chicken nuggets | 15.38%

Chicken wings | 23.08%





Detailed ordering Behaviour

60% of unaccompanied young people who came to the shop ordered chicken products

Young



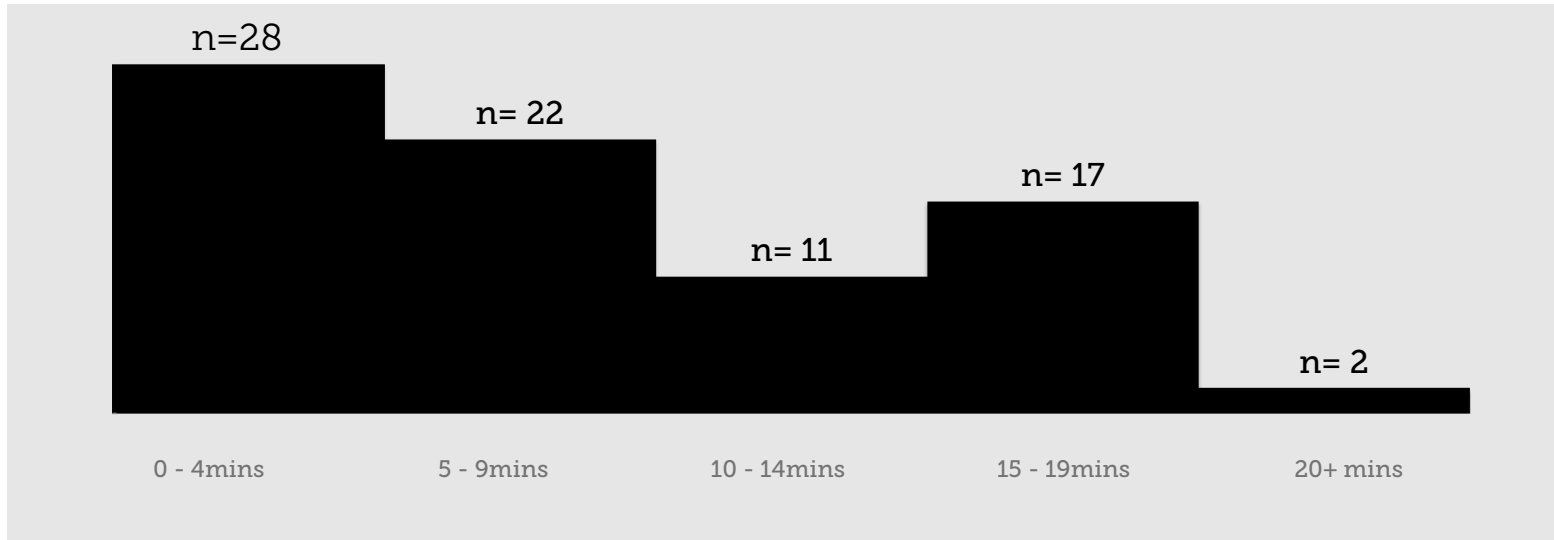
Additional key

Chicken meal	30%	
Lamb doner	10%	
Cheese burger	10%	
Chicken wings	30%	

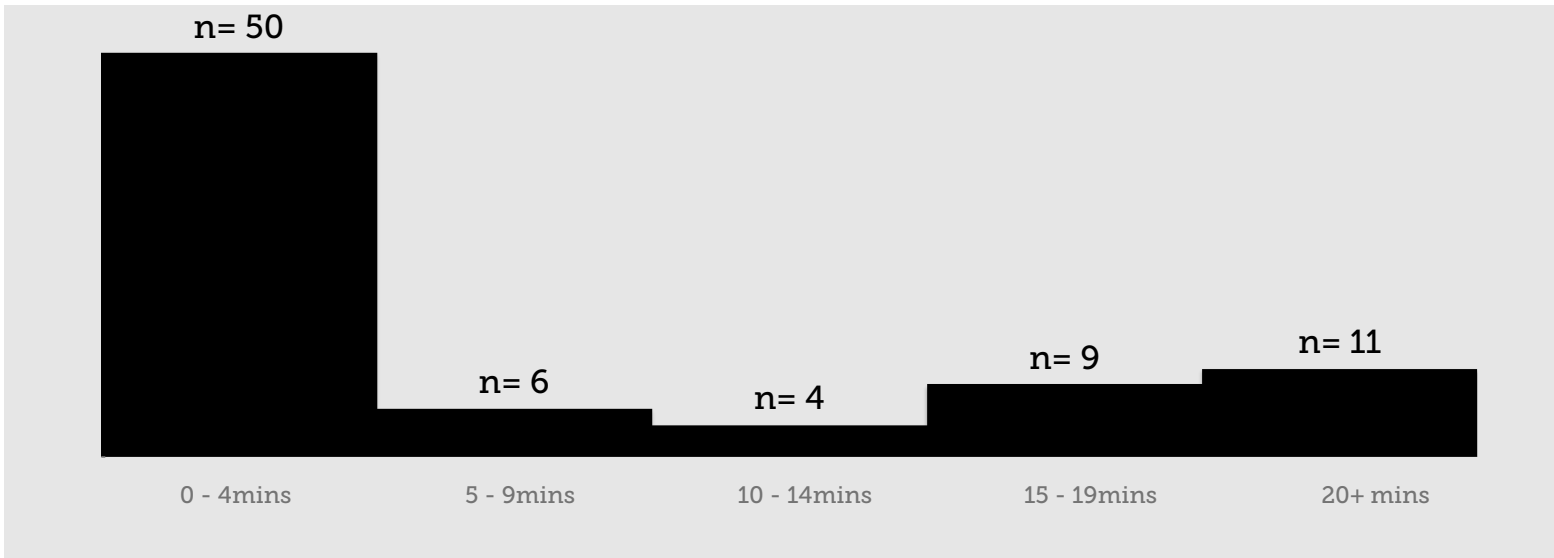
Time spent in chicken shops

Once at the shop, most people got their food very quickly, a quarter within 4 minutes. Over half of people also left the shop within 4 minutes of receiving their food.

5a. before food is received (all)



5b. after food is received (all)



Spending behaviours

6a. distribution of spending behaviour



6b. average chicken shop spending by demographic



Spending behaviours

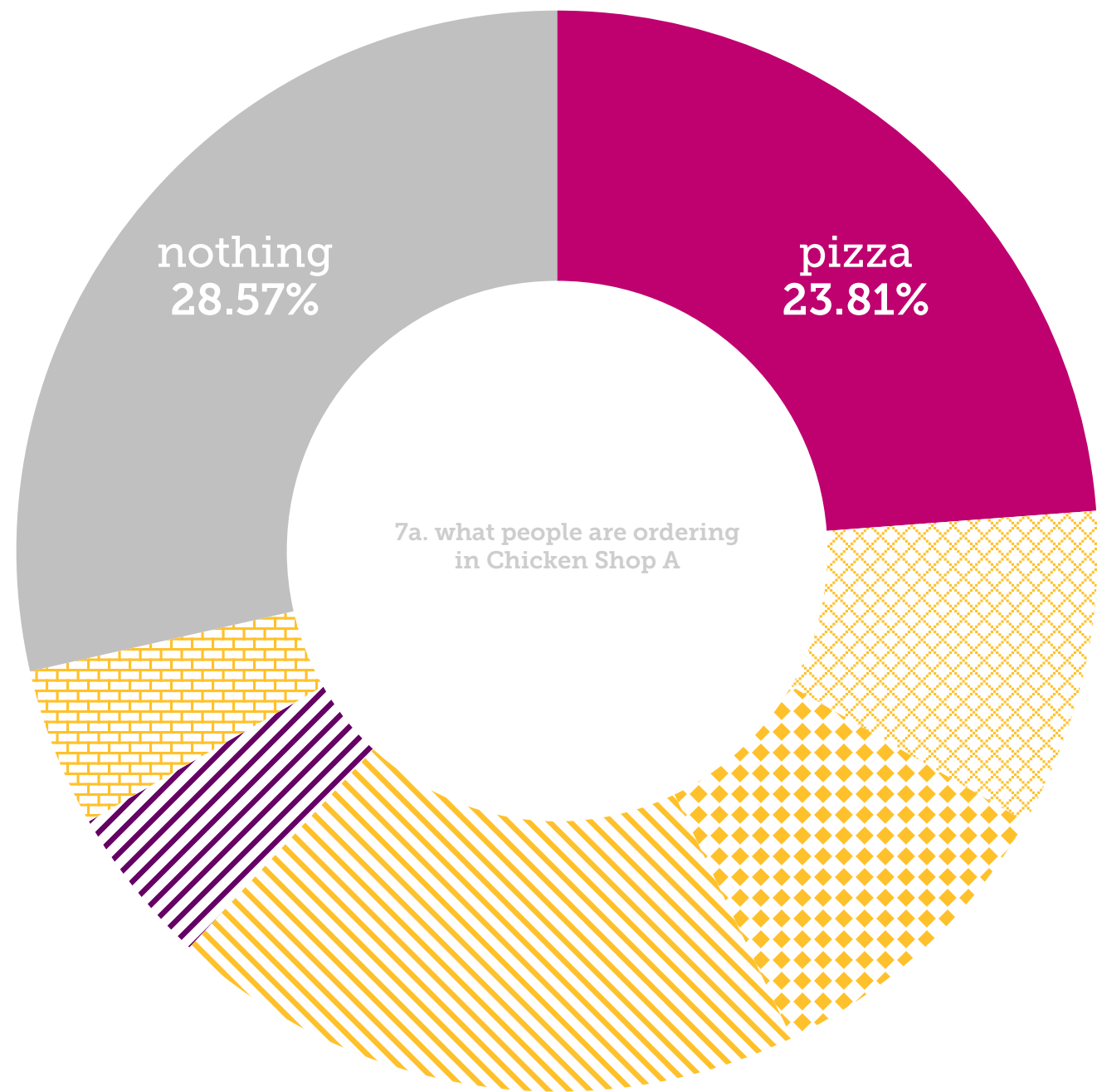
The average spend on chicken was £2.21. This included cheaper items like chicken nuggets and more expensive items like chicken meals.

By food type








Ordering behaviour

Chicken Shop A

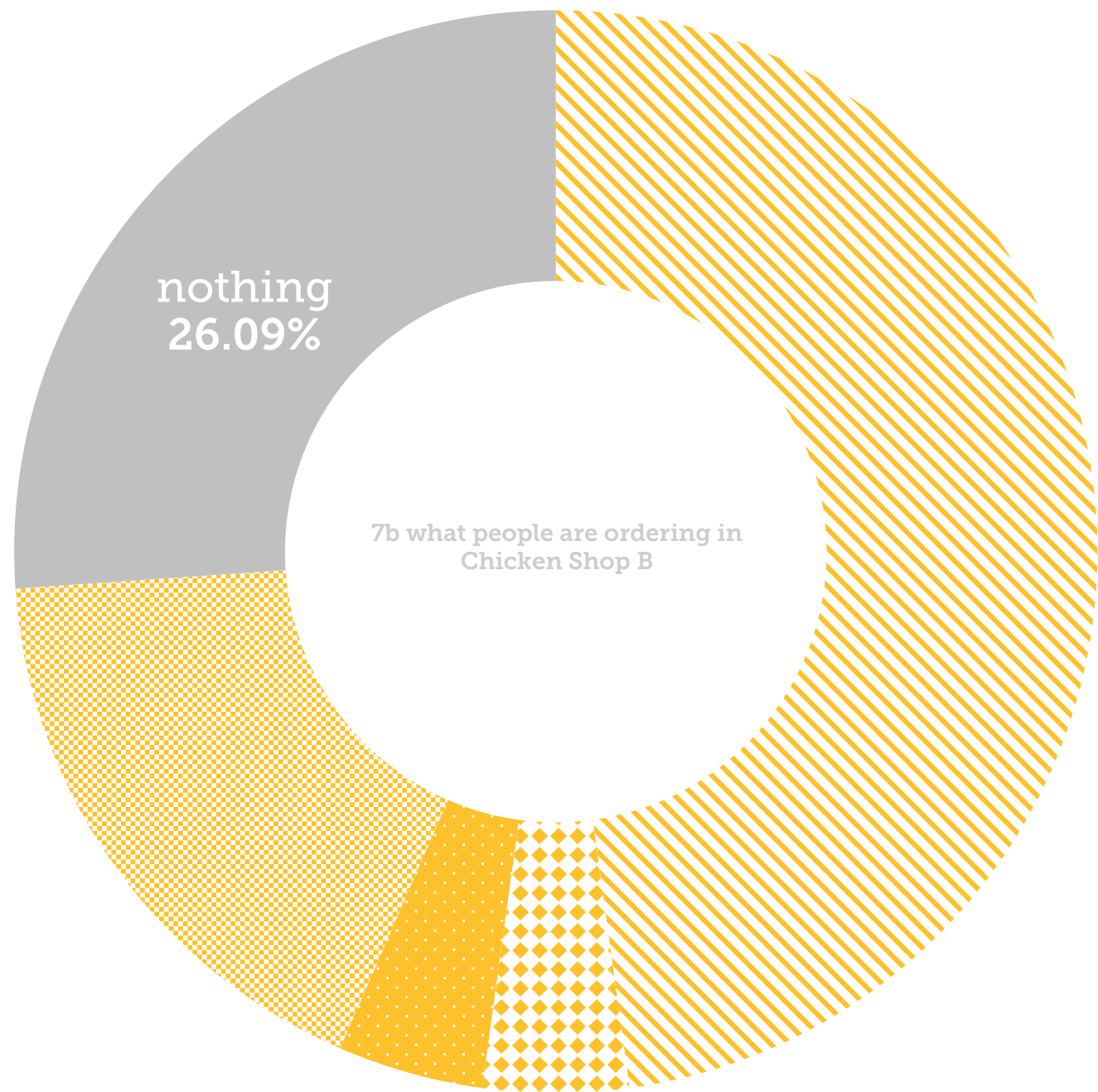


Additional key

- Hot wings | 9.52% 
- Family meal | 9.52% 
- Chicken meal | 19.05% 
- Quarter pounder | 4.76% 
- Chicken burger | 10% 

Ordering behaviour

Chicken Shop B

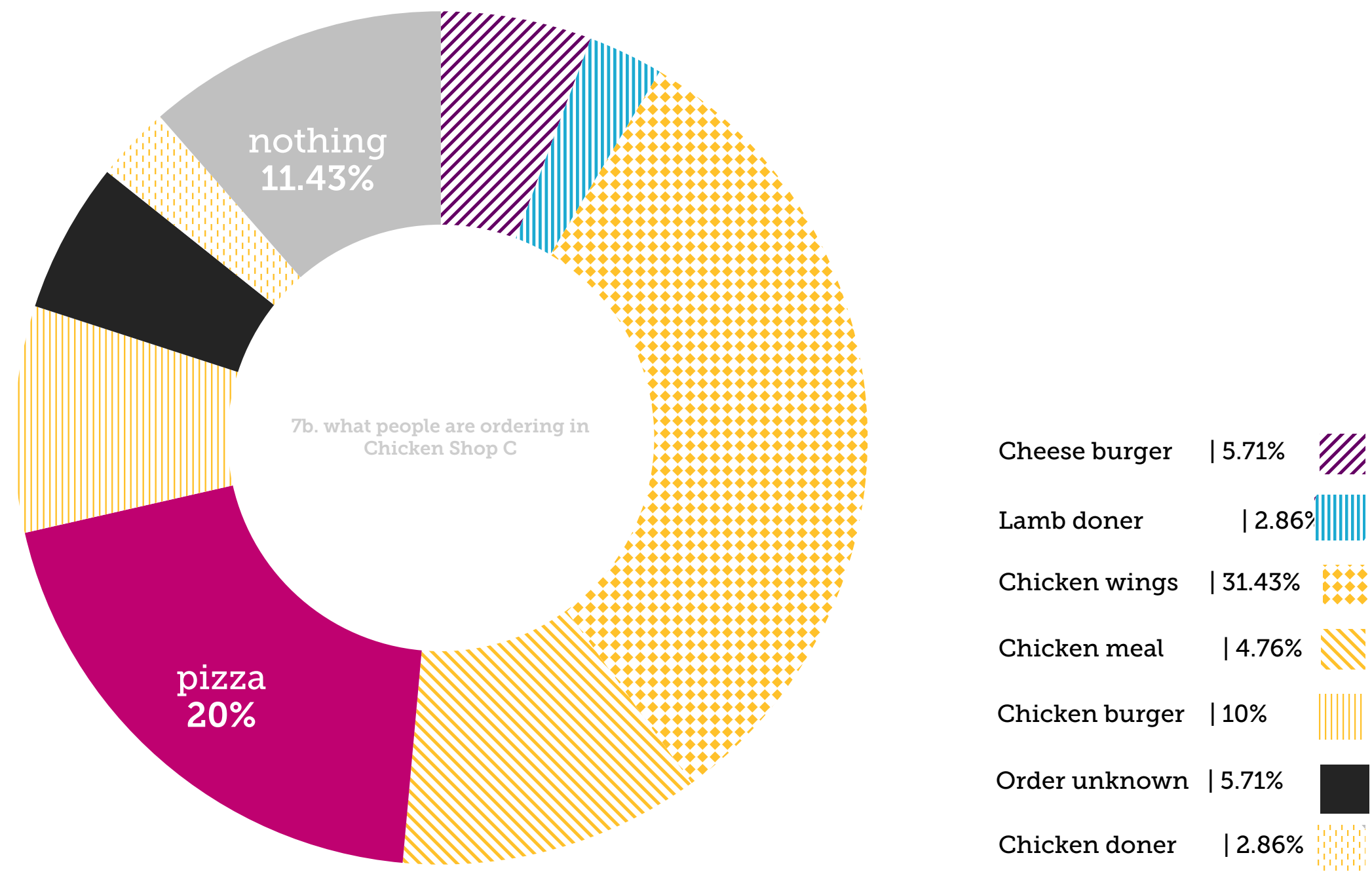


Additional key

- Chicken meal | 47.83%
- Chicken wings | 4.35%
- Family meal | 4.35%
- Chicken strips | 17.39%

Ordering behaviour

Chicken Shop C



Surveying young people

We asked young people in a Newham school about their fast food intake and preferences through focus groups and a survey.

We conducted:

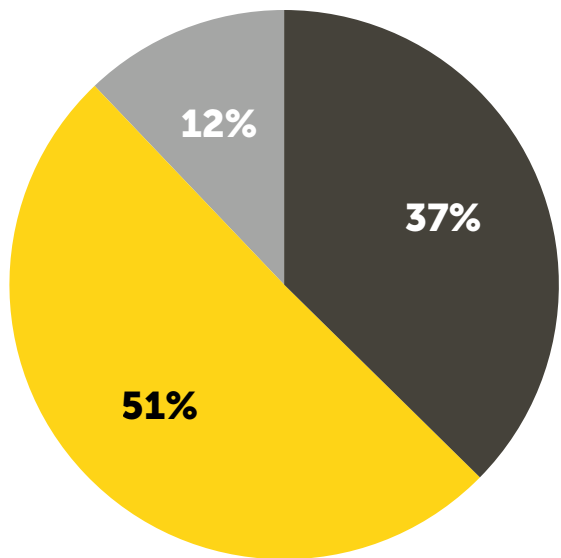
- A one hour workshop with 20 sixth form students from St Bonaventures School, Forest Gate, East London
- A two hour workshop with 40 sixth-form students who are members of Newham Youth Council
- An anonymous follow up online survey with 30 members of Newham Youth Council on their current habits

Students' current eating behaviour

Workshop with 20 students from St Bonaventure's and St Angela's Sixth Form, Forest Gate

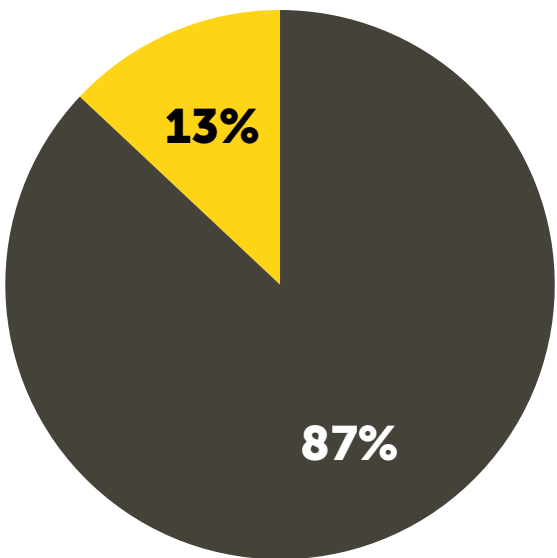
A large number of students who claim they 'skip lunch' are often replacing meals with snacks and not reporting these as meals

Lunch



- skipped lunch
- ate fast food (50% fried chicken, 50% McDonald's)
- had a sandwich

After school



- had a snack or no snack at home
- ate fast food

Key findings on young people's habits and views

St Bonaventure's and St Angela's Sixth Form in Forest Gate

Students are allowed out at lunch

The sixth form is part of a secondary school where junior students aren't allowed out at lunch

A very low percentage eat in the canteen as it is associated with junior students and those having free school meals

There are two campuses near each other that the students travel between and often buy food on the way

A short lunch hour doesn't allow them to travel very far

There is a clear limit to which they are prepared/able to travel

Students here weren't snacking in local restaurants that much after school, unlike other schools

Students suggested there wasn't an appetite for somewhere serving breakfast before classes, unlike other schools

A large number of students who claim they 'skip lunch' are often replacing meals with snacks and not reporting these as meals

Key findings on young people's habits and views

Workshop with 20 students from St Bonaventure's and St Angela's Sixth Form, Forest Gate

If we had time we'd go somewhere healthier like Subway – but we couldn't get there and back in our lunch break.

Student

If they opened a restaurant in the school grounds we wouldn't go – we like going out at lunch and getting off the grounds, otherwise we look like junior kids.

Student

There is a good cafe, but it takes too long for them to serve food in there.

Student

Key findings on young people's habits and views

Workshop with 20 students from St Bonaventure's and St Angela's Sixth Form, Forest Gate

It's got to be quick. Unless they can serve everyone instantly we wouldn't go. We don't have time to queue in our lunch break.

Student

We love deals, like the 2 for £2 at Sam's.

Student

There used to be a milkshake bar that we all looked forward to being able to go to when we were lower down in the school but it's closed down now. I wish that was still open.

Student

Key findings on young people's habits and views

Workshop with Newham Youth Council

88% of people said that serving tasty food is what would encourage them to try a new takeaway/restaurant, 80% serving cheap food. Other features that would require a larger, more permanent space were less of a draw: Only 50% said music, 61% wifi, 15% arcades, and 25% 'the feel of a youth club' would encourage them to go

50% of young people said if a new place 'looked too much like a youth club', that would actively put them off trying it

Key findings on young people's habits and views

Workshop with Newham Youth Council

It would be good to have money off tokens and discount cards but what's more important is to be really quick.

Member of Newham Youth Council

Being halal is important.

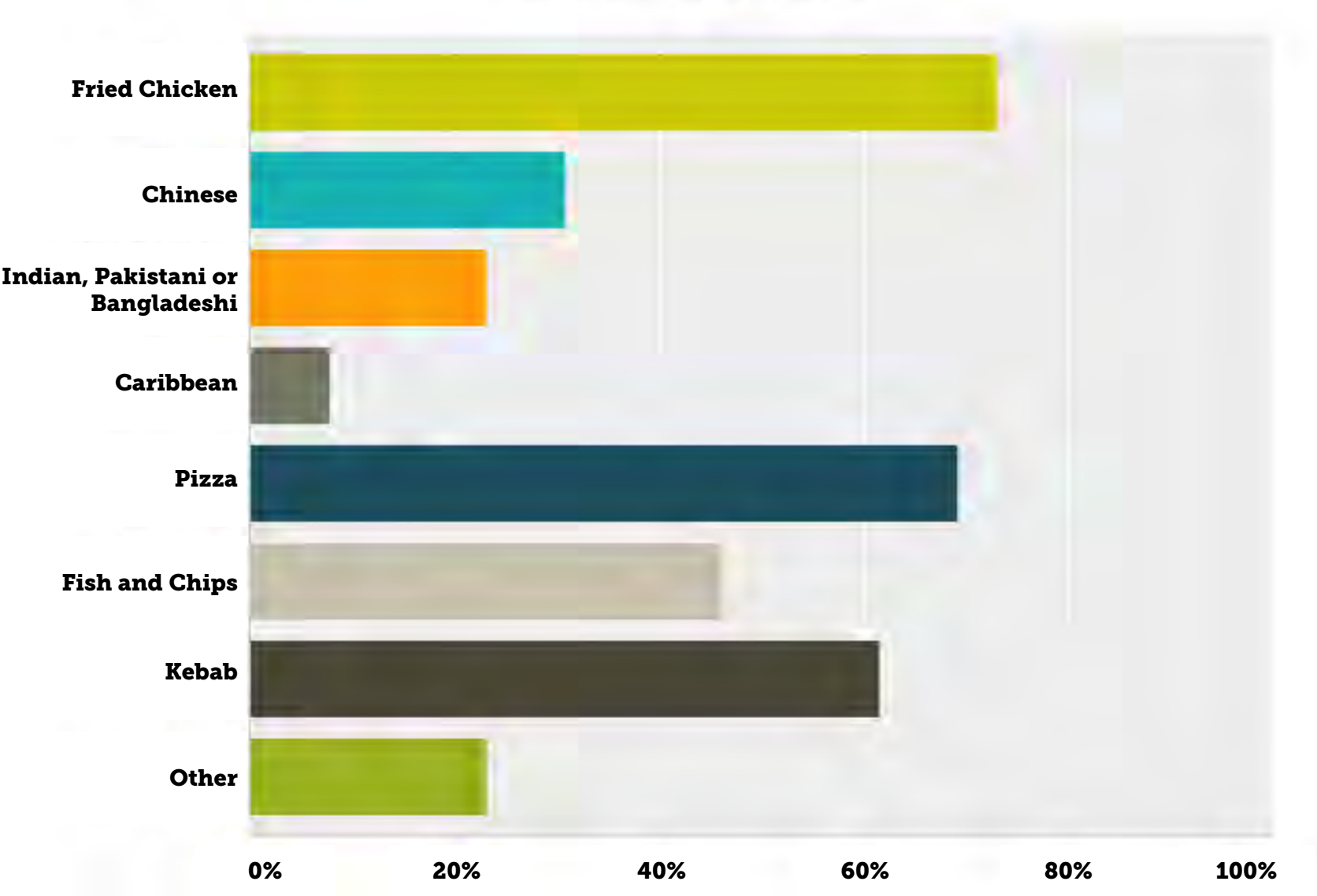
Member of Newham Youth Council

You need prime real estate, somewhere all the kids are going past.

Member of Newham Youth Council

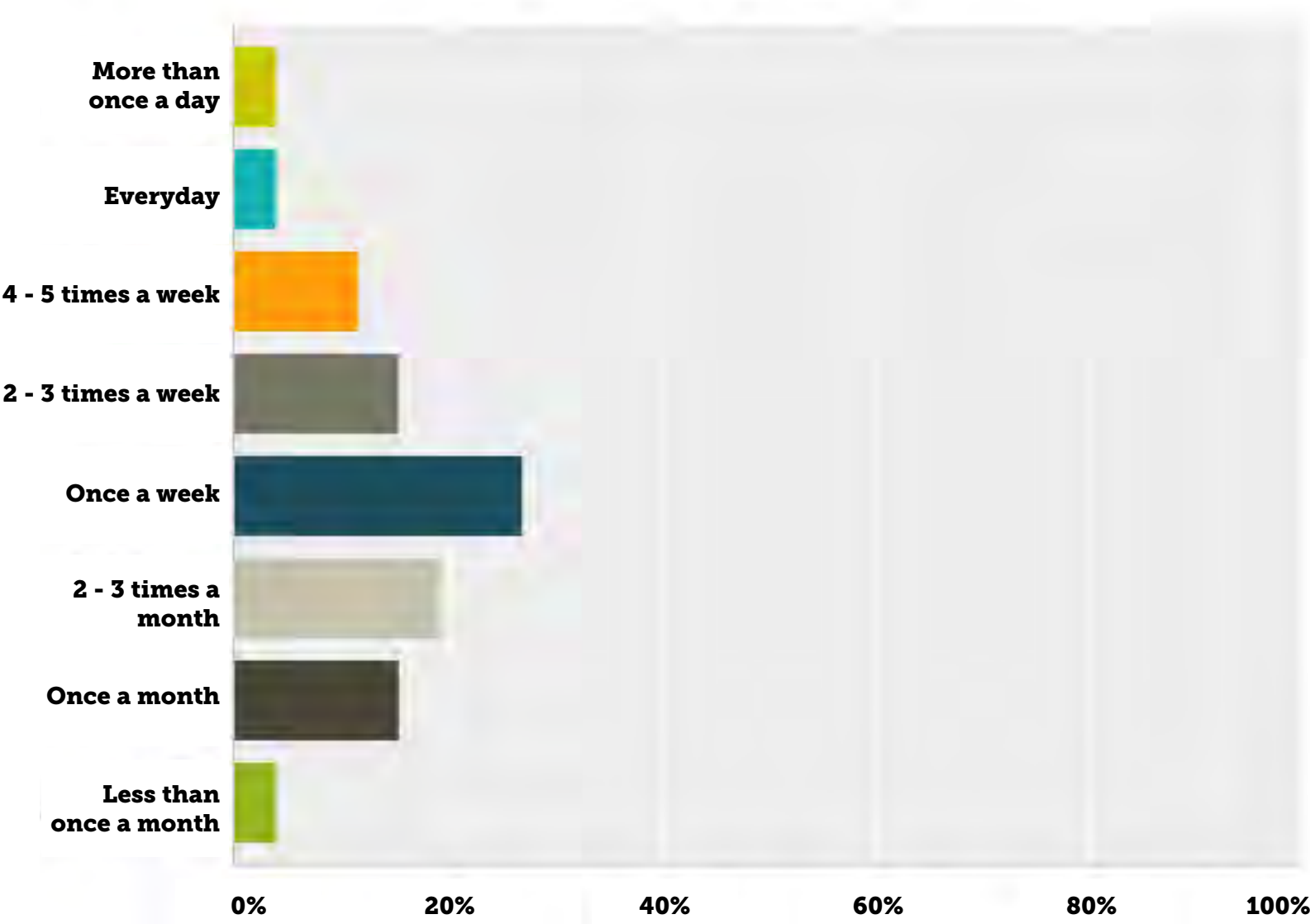
Type of fast food shop they usually go to

Online survey with Newham Youth Council



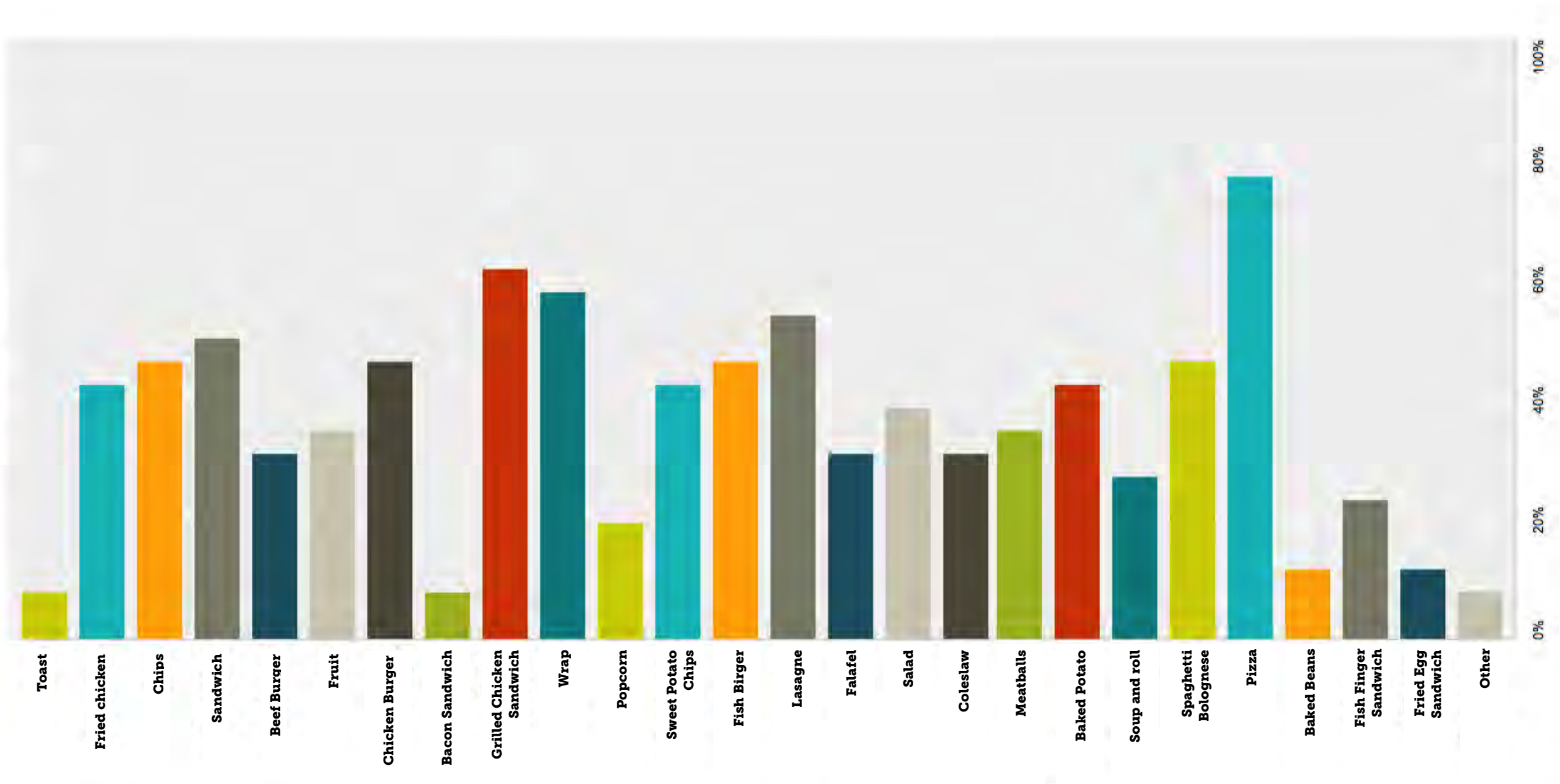
How often they eat from a fast food shop

Online survey with Newham Youth Council



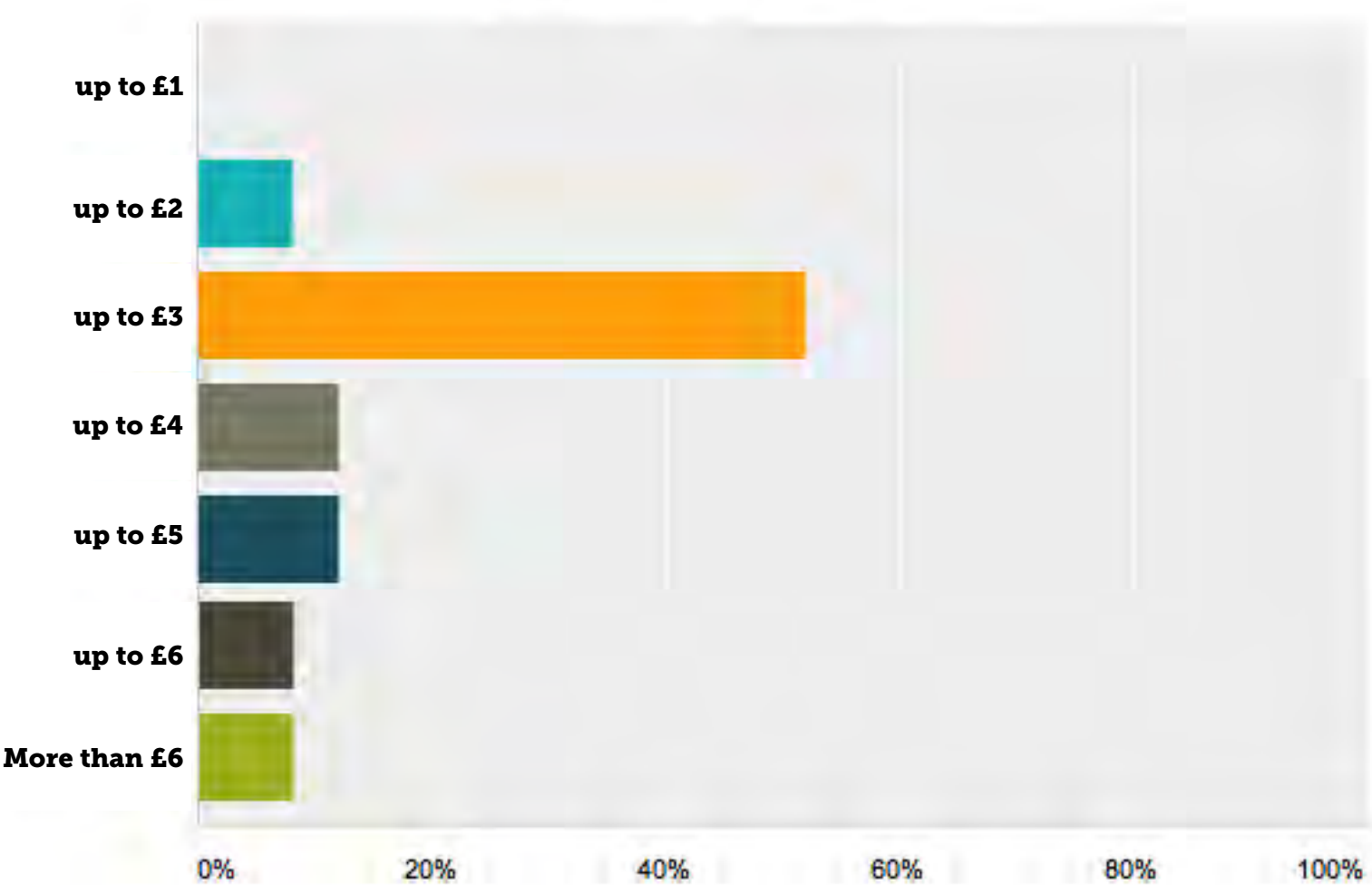
Food items young people would like to eat at lunch or after school

Online survey with Newham Youth Council



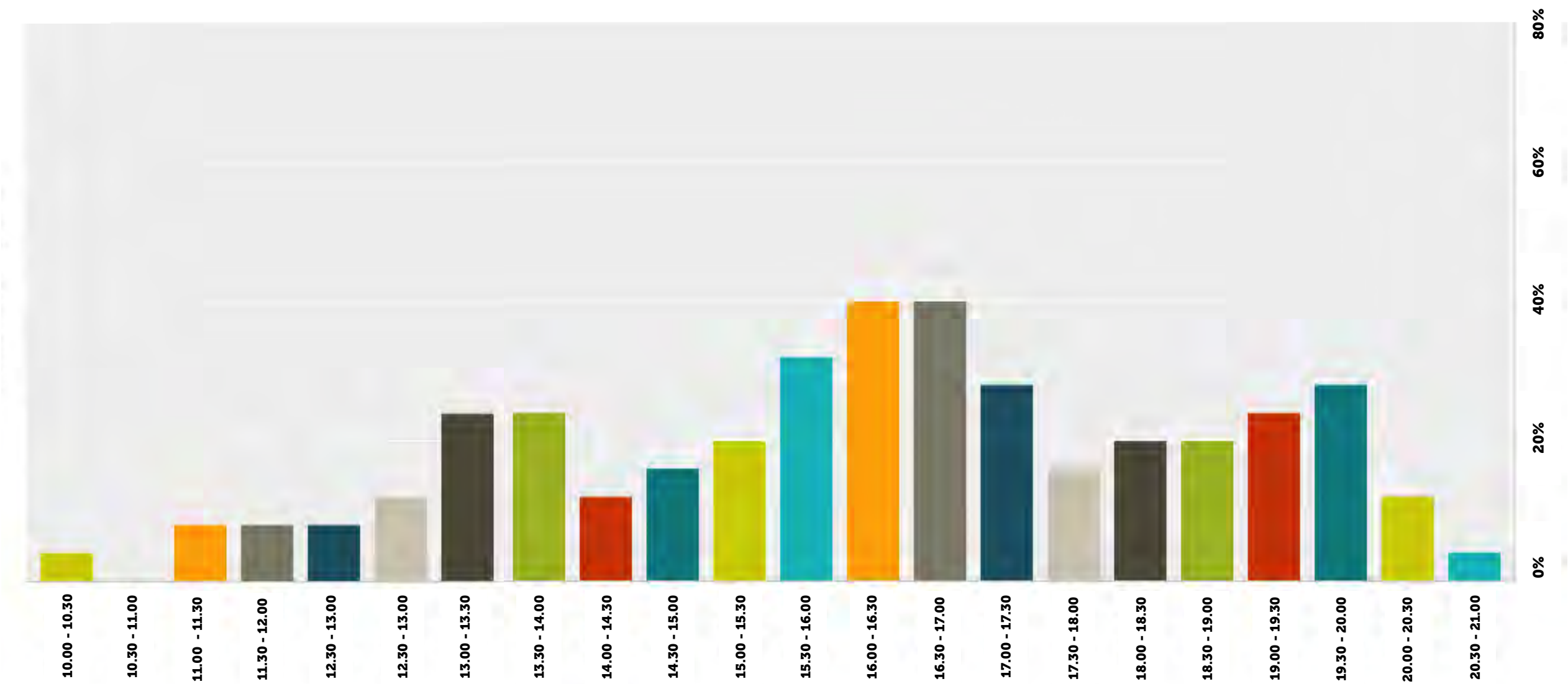
Maximum they would be prepared to spend on lunch

Online survey with Newham Youth Council



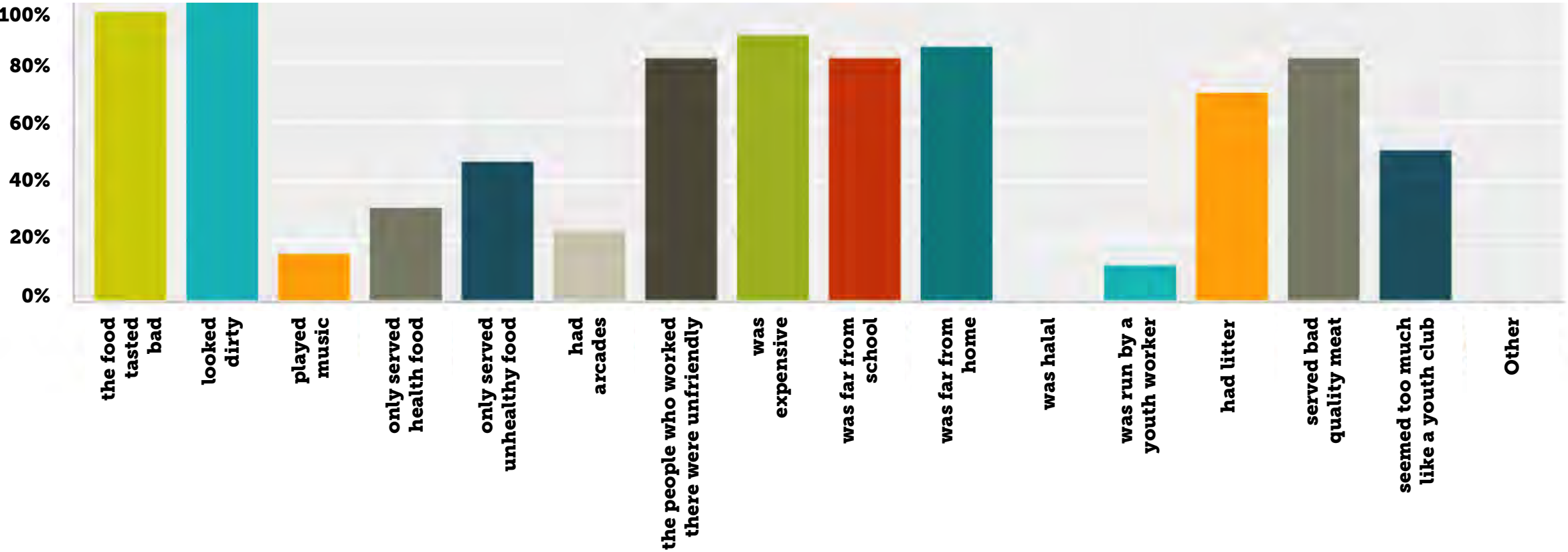
Time of day they are most likely go to a fast food shop

Online survey with Newham Youth Council



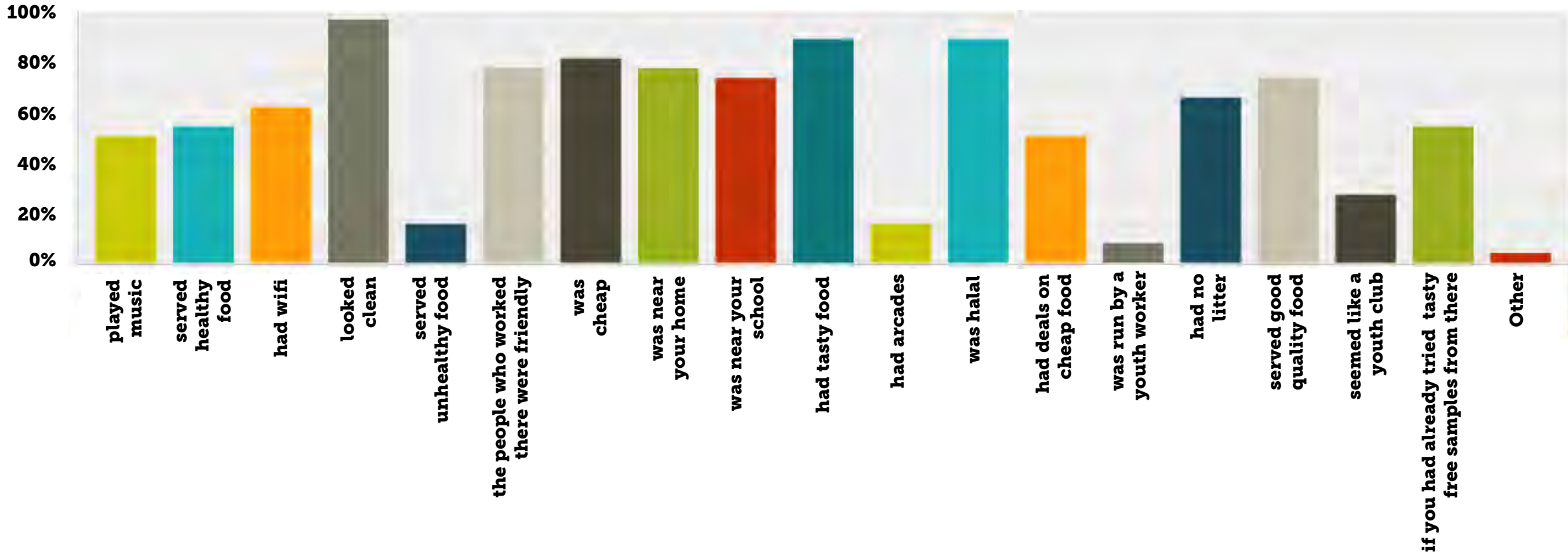
What would put them off trying a new fast food shop

Online survey with Newham Youth Council



What would encourage them to try a new fast food shop

Online survey with Newham Youth Council



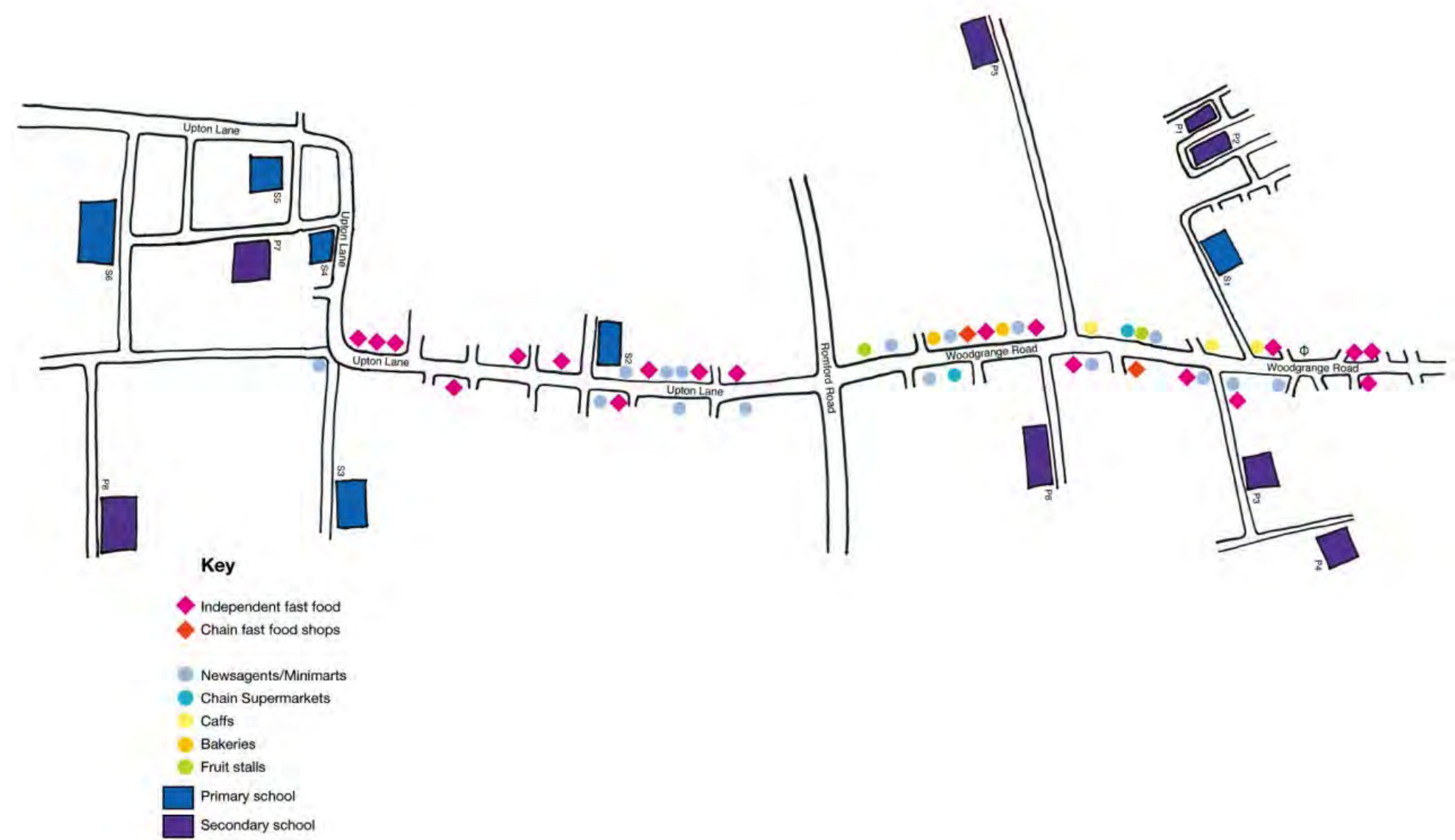
Local environment mapping

We mapped the food outlets on major routes between schools and stations in two low income urban areas. One area was Upton Lane and Woodgrange Road in Newham, and the other was in Handsworth, Birmingham.

The maps clearly show the ubiquity of fast food outlets, and show how little ready-to-eat healthy food there is in these two environments.

Local environment mapping

Forest Gate, Newham, 2012 data



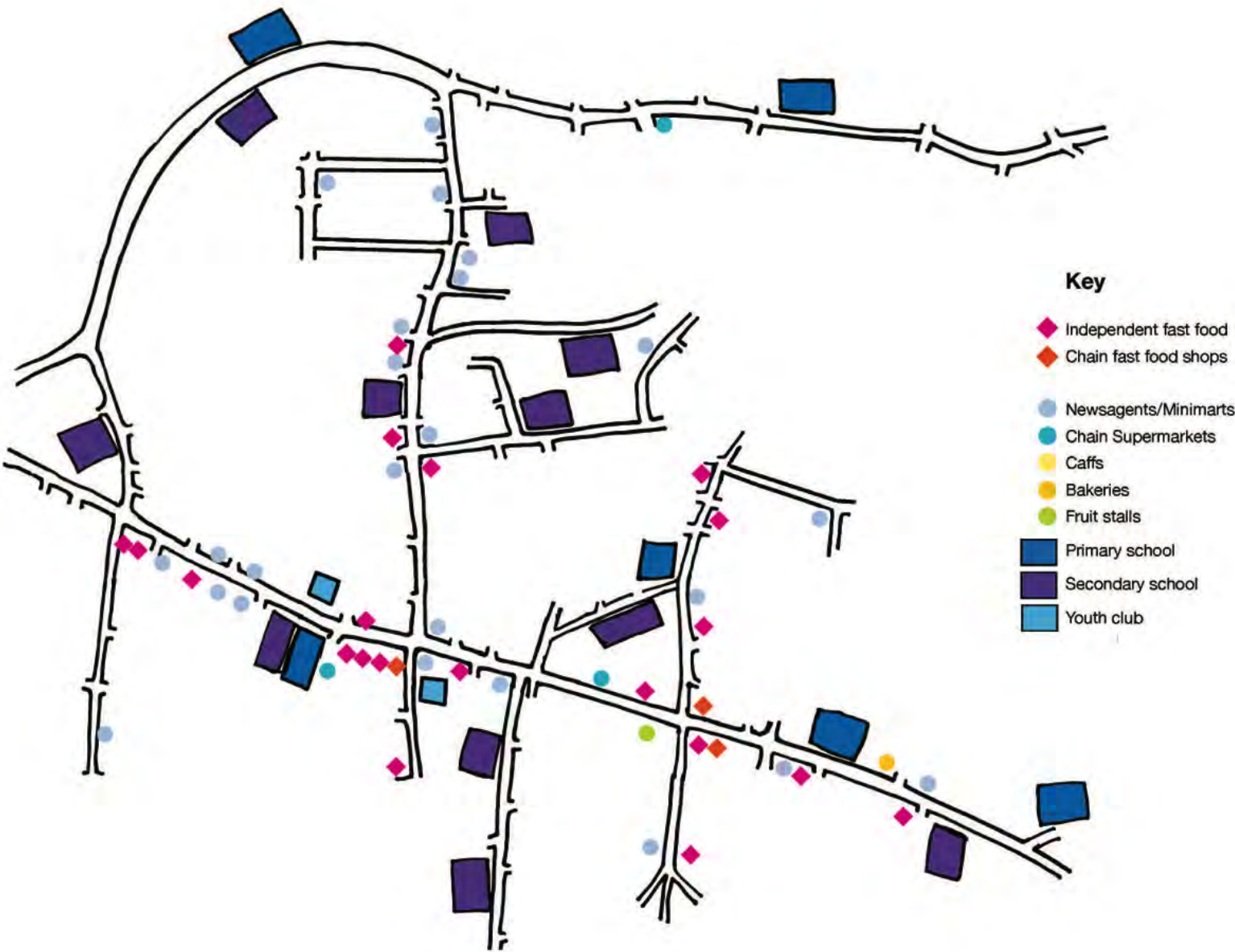
Local environment mapping

Forest Gate, Newham, 2012 data



Local environment mapping

Handsworth, Birmingham, 2012 data



Ethnography

We undertook some light touch ethnographic research in Newham, London and Handsworth, Birmingham, to help us gain an understanding of the young people beyond the chicken and chip shops, the lives they lead, and how their food choices fitted into this.

This work created a snapshot of a chicken and chip shop in a typical 24 hour period, and documented the relationship between young people and chicken and chip shops. The profiles in this section are based on interviews and pictures from some of those we met during this period.

Case study of young person, Handsworth, Birmingham

Age: 16

Sex: Female

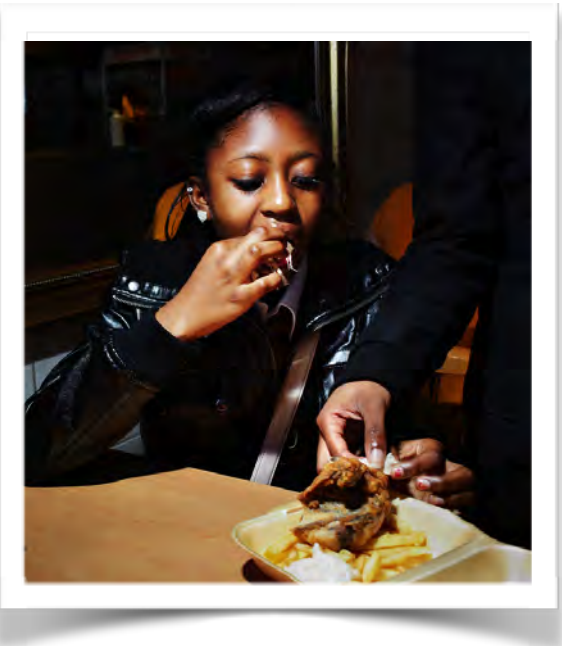
She goes to Holyhead School but lives in Erdington. She goes to Dixie Chicken everyday on her way to her bus after school.

Sometimes she comes at the weekend with her mum. She always spends up to half an hour in the shop with her friends, where she mostly eats the food she buys, unless she runs for her bus or eats outside the front of the shop. She doesn't go to any other food places, except for McDonald's and KFC. She buys food at Dixie every day if she's got the money, usually spending £1 a day on either steak burger, 4 wings or 1 piece with fries. She's spending under £5 a week at Dixie. She wouldn't change anything about Dixie except maybe make the shop bigger. She usually puts her rubbish in the shop's bins.

She says she likes Dixie because "It tastes really nice, and the people that serve are really nice. He gives me free food, his dad owns the place. I'd still come even if it was more expensive."

She says, "We know it's a takeaway shop and so we know it's unhealthy, but it's nice. And they don't fry with much oil here, not like other shops, here they always use new oil."

"It tastes really nice, and the people that serve are really nice."



Case study of young person, Handsworth, Birmingham

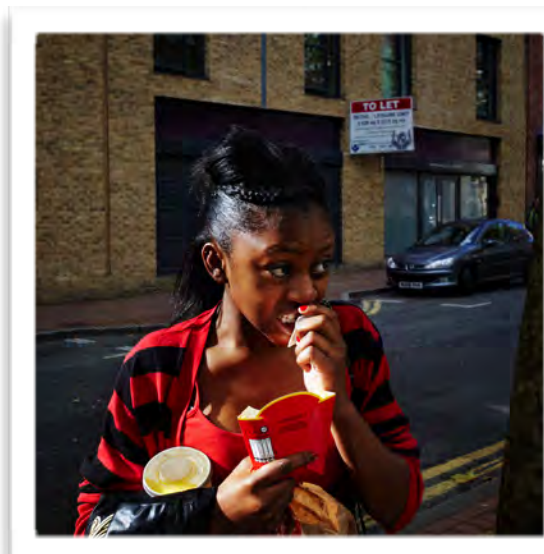
Age: 16

Sex: Female

She goes to Holyhead School. She lives round the corner from Dixie. She comes into the shop every day with her friends after school but she doesn't buy food every day. She always goes to Dixie, not other places, and only as an after school thing through the week. She spends about 15 minutes there with everybody, and eats in the shop if she has food. She usually buys fries for 90p two or three times a week, and never anything different. She wouldn't change anything about the shop. She says the staff are ok, but it doesn't make any difference what they are like, she would still come here. She always uses the bin in the shop.

She says she likes Dixie because "It's cheap and my mates come here. I'd still come here if the food tasted bad as long as my mates came here."

"I kind of mind that it's unhealthy, and I would go to a place with healthier food as long as other people went there."



Case study of young person, Handsworth, Birmingham

Age: 16

Sex: Male

Daniel is at Holyhead School and lives locally. He comes to Dixie every day after school and usually on a Saturday but not a Sunday. He hangs around for about half an hour. He always comes with mates or to meet mates. He usually eats in the shop. He eats at other takeaways, anywhere that's handy, particularly KFC. He has takeaway every day of the week. He thinks the meals are good for you. He puts his rubbish from Dixie in the bin in the shop.

He says he likes Dixie because it's cheap and convenient.

He always orders either wings and fries or steak burger and fries.

"I spend between £5 and £10 a week in Dixie and between £10 and £20 overall on takeaways each week. I wouldn't change anything about Dixie, except maybe have more space."



Case study of young person, Handsworth, Birmingham

Age: 16

Sex: Male

He is at Holyhead School, and lives locally. He comes to Dixie every day except Sunday and hangs around the shop for about half an hour each time. He always comes with mates or to meet people there. He nearly always comes to Dixie and so doesn't go to other places except to get a Chinese takeaway. He eats his food in the shop. He thinks the staff are OK and wouldn't change anything about the shop except for maybe more space. He spends less than £5 at Dixie a week but about £20 a week on takeaways because of the Chinese meals. He throws his rubbish on the road.

He says he likes Dixie because it's cheap and convenient.

He says he knows the food isn't healthy. He always orders the same thing – 4 wings and fries.

“It's cheap and nearby and I like the food”



Case study of young person, Handsworth, Birmingham

Age: 16

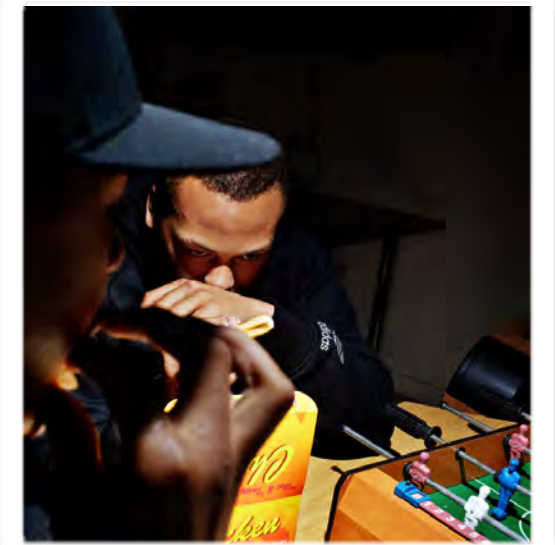
Sex: Male

He goes to Law, Leisure and Learning youth centre round the corner from Dixie and lives nearby. He goes to Dixie 2-3 times a week, usually between 6pm and 9pm. He goes through the week and at weekends. He always hangs around for a while in the shop or nearby and sometimes brings the food back to the youth club. He meets people at Dixie, its near to where he lives.

He likes Dixie because it's cheap and his mates go there. He also goes to other food places and prefers the food at Big John's but Dixie is where his friend's go. At Dixie he has either steak burger, 4 wings or chicken and chips. He would leave and go to Big John's if he fancied a chicken burger because he doesn't like the burger at Dixie.

He spends about £3 a week at Dixie, and £3 a week at Big John's and sometimes has a Chinese meal but other people buy it for him. He has take out food nearly every day. He knows it isn't healthy but he says he doesn't care. He usually throws his rubbish on the floor because it's easier.

"I like the staff, they're funny and I know the manager at Big John's."



Case study of young person, Handsworth, Birmingham

Age: 16

Sex: Male

He goes to Law, Leisure and Learning and lives nearby. He goes to Dixie nearly every day in the evenings, except for Sunday. He sometimes hangs around but usually just buys and goes, often to the youth club or to eat his food at home. He goes with mates or meets people there. He also goes to McDonald's, KFC and Big John's. He likes Dixie because it's cheap and convenient. He wouldn't change anything about Dixie. He thinks the staff are OK.

He will use a bin if there's one there but otherwise throws it on the floor. He usually spends between £10 and £20 a week on takeaways.

He says he knows the food isn't healthy but it's quick food.

He always orders either 4 wings and fries, pizza or steak burger and fries.

"I always orders either 4 wings and fries, pizza or steak burger and fries."



Case study of young person, Handsworth, Birmingham

Age: 16

Sex: Male

He goes to Law, Leisure and Learning youth centre round the corner from Dixie and lives nearby. His family are from Poland. He goes to Dixie two or three times a week after school or when at the youth club, not at weekends. He will buy the food and take it to the youth club. He only goes to Dixie and spends about £3 a week. He uses the bins in the centre. He has either steak burger and fries or one piece of chicken, fries and a Pepsi for £1.

He says he likes Dixie because it's cheap and nearby and he likes the food. He doesn't go to Big John's because the chips are fat and he doesn't like the taste. He says the staff in Dixie are shit, that they're scared of everyone. He isn't sure if the food at Dixie is healthy, he doesn't think about it, just the taste.

"My mum knows I go there and she tells me not to because I'm not hungry when I get in for tea."



Case study of young person, Handsworth, Birmingham

Age: 35

Sex: Female

She lives near to Dixie, it's on the way home from school. She comes in every day including weekends with her four kids. They usually eat in the shop because if they walk the kids drop the food and if they took it home then the fries are soggy and the burger's have 'dropped dead.' They nearly always come to Dixie, not other places because it's cheap, the best food and nearby. She also likes the staff, they are friendly and give the kids free lollipops. She wouldn't change anything about the place. She always uses the bins in the shop.

She has a teenage daughter and four kids in primary school who come with her.

"I know the food isn't healthy but it's quick and what the kids like. They're starving after school and need to eat."



Case study of young person, Newham, East London

Age: 15
Sex: Male

He travels to school from East Ham North to Forest Gate by bus. On a typical day he stays at school in his lunch hour and goes to a club or activity after school.

Monday to Friday, he usually gets his breakfast from a shop, brings lunch in from home (he is not old enough to be allowed out at lunch), and goes to a restaurant/takeaway for a snack after school and dinner. On weekends he eats breakfast at home, but typically buys food from a shop for lunch and from a restaurant/takeaway for dinner. He says he goes to a wide range of restaurants/takeaways including fried chicken, Chinese, Indian/Pakistani/Bangladeshi, kebab, pizza and fish and chips.

His favourite place to get food is Subway, where he usually orders an Italian BMT costing around £3, which is the maximum he is prepared to spend on lunch, but he would spend more (up to £7) on dinner, and less (up to £2) on a snack after school. He says he likes Subway's for its taste, location, staff and prices.

If a new takeaway restaurant/takeaway were to open, he would be interested in going there for breakfast before school.

The times he was most likely to go to a restaurant/takeaway were 10–10.30am, 4–5pm and 7–8pm.



Case study of young person, Newham, East London

Age: 15

Sex: Female

She lives in Forest Gate and travels to school by bus. On a typical day she stays at school in her lunch hour and goes to a club or activity after school.

Monday to Friday, she brings lunch in from home (again, she's not old enough to go out for lunch), and gets any snacks after school from a local shop. She says she is most likely to go to a restaurant/takeaway between 3.30 and 5pm but says she only eats food from a restaurant/takeaway around 2–3 times a month.

Her favourite place is "Kebab Original" where she normally orders a seekh kebab for £3. She likes the location, tastiness and price, but says she would like to improve its hygiene standards.

She wouldn't be interested if somewhere opened offering breakfast.

The foods she cited wanting to eat for lunch included chips, pizza, lasagne, meat balls and baked potatoes.

Her advice for anyone opening a restaurant/takeaway in the area is: "Make it local. Make it look clean and modern. Make sure the prices are affordable. Advertise it at schools. Have friendly staff."



Chicken shop business profiling

The prevalence of chicken and chip shops in low income urban areas is due to the popularity of their products, and also the low prices that they are able to maintain.

We did a series of interviews with the owners or managers of two London chicken shop chains in order to understand their business models, their customer base, and what they saw as their competitive advantage.



Spotlight: Chicken Chain A

Chicken Chain A is a popular and large chicken shop franchise based in the north west of London. There are 27 franchise stores and 10 stores.

They focus on speed and supply chain to create a slick operation that rivals high street takeaways like KFC. Increasingly they are targeting the sit down fast food market with larger stores and prime locations on the high street. They are also planning on expansion overseas.

“The staff are trained to a level where they understand customer needs and are able to serve them in a speedy way” - Operations Manager

They charge royalty fees to franchisees, that are based on weekly revenue. Franchisees also purchase products, such as breasting, from the parent brand. This is mandatory and ensures that the chain's high standards and food quality are maintained across all stores at all times.

The focus of the chain going forward lies heavily in new product development, with a current push towards rolling out a new full menu range of Peri Peri grilled chicken to all branches. This move towards healthier options is driven by the chain's belief in creating healthy, lifelong customers. So far, they are seeing positive growth in their range of grilled Peri Peri Chicken which is already accounting for a significant percentage of the chain's total revenue. This is quick growth as this healthier menu was launched only one year ago.

Spotlight: Chicken Chain A

Menu Items	30	Supplier List Sam's Fast Food Ltd 2 Sisters Kay Chemicals	Staff Break Down Manager Assistant Manager Supervisor Staff	No of Stores	37
Av. Meal Price * <small>*Excluding Family Meals</small>	£3.80			Business Model	Franchise
Av. Cust Spend	£3.60			Turnover* <small>*Average Yearly Per Store</small>	£312K
Top Menu Items		Peak Periods	Costs		
Peri Peri Wings Chicken Strip Burgers Peri Peri Grilled Burger		Lunch Time 4pm 7pm	Kitchen: £110,000 (incl. Deep Fryer: £8000, Oven: £6000) 10p per chicken wing (due to economies of scale) Manager: £14 - 16k per year Staff: £6 - £7 per hour Franchise Fee: £50 - £150 (+2% of sales for advertising) (extra costs for 16+ seating incl. toilets, cleaning etc)		
Extra Notes	A popular independent chain aiming to compete with the likes of KFC				

Spotlight: Chicken Chain B

Chicken Chain B is a popular chicken shop franchise catering for the south of London. There are currently around 45 stores with more opening this year.

They focus on low cost, speed of service and maintaining a local, informal feel. They target young people, students and low income workers who are on the move with smaller stores typically off the high street.

“We’re not focusing on the family market so much, like some other chains. We want to be the place where the young student or that kid on the street who has £2 in his pocket can come to get tasty good quality food. We’re proud of that” - Owner

They are a royalties only business, charging a flat fee of £50 per week to their franchises.

Franchisees have a significant amount of freedom over their businesses including process, operations and suppliers. The HQ conducts ongoing quality control to ensure that food retains a consistent taste and that health and safety standards are upheld. They have loose branding guidelines with elements like branded boxes, but these are not strictly enforced. They have said that this strategy of autonomy paired with a moderate to low level of regulation has enabled the chain to retain it’s indie feel, resulting in local nuances that it’s loyal base of customer love.

Since launch, menus and recipes haven’t changed much with most of their franchisees offering the small basic menu comprised of chicken wings, chicken burgers, beef burgers and nuggets.

Spotlight: Chicken Chain B

Menu Items		14	Supplier List		Staff Break Down		No of Stores		45
Av. Meal Price *		£2.50	Bell Meats (exclusive for breadding) JJ Foods Star Dibs		Manager Staff		Business Model		Franchise
*Excluding Family Meals									
Av. Cust Spend		£2.50					Turnover*		£182K
							*Average Yearly Per Store		
Top Menu Items			Peak Periods			Costs			
Chicken Wings Beef Burgers Chips			Mon - Fri: 12.30 - 2pm* Fri - Sat: 6 - 8pm, 2 - 3am *plus 3.45 rush of school kids			Rent: £12,000 - £22,000 Brand New Deep Fryer: £8000 + VAT Reconditioned Deep Fryer: £5500 (no VAT payable) Food costs: 40% of revenue e.g. 10 per chicken wing* Brand New Full Combi Oven: £6000 + VAT Franchise Costs: £50 per week			
Extra Notes	Cheap and cheerful, serving those on the lowest budgets a consistent menu.								*based on 40% of 6 chicken wings at £1.50

Conclusions

Our product/service development work looks to create a practical solution to the problems of obesogenic environments, poor diets and youth obesity. Our research highlighted several key points which have informed the development of our work.

Fast food outlets serve a growing need in the current market place, providing cheap, filling food and a warm, free, relatively safe third-space for young people to spend time in. Working with the current fast food culture to make more tasty but healthy options available is more practical than trying to dramatically shift the way people eat.

Our research showed that what attracted young people to fast food outlets was food that was cheap, quick, close and tasty.

Cheap

Less than £3

Quick

less than 20
mins
from school

Close

less than 200m
from school

Tasty

hot and
flavoursome

Young people also enjoyed the independence of spending their own money off the school premises.

There was very limited access to healthy food in the low-income urban areas that we mapped, and none that met young people's needs.

Our priority is therefore to develop a service that puts healthy, cheap, quick, hot and tasty fast food into these areas.

Contact

For more information, see shiftdesign.org.uk

Contact ella.wiggans@shiftdesign.org.uk

Shift

Shift, formerly known as We Are What We Do, is a social enterprise with ten years experience designing consumer products which address social problems by helping people make better choices. By designing products that meet consumer demand and that can become independent, financially sustainable ventures, we aim to give them the best chance of delivering measurable, long-term impact at scale.