

2023 PROVEG UK FAST-FOOD RANKING



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INTRODUCTION

Positive perceptions and consumer demand for plant-based foods have increased dramatically in recent years, particularly among flexitarians. Food producers have responded to these trends by innovating their products, investors and shareholders by moving their attention to the plant-based industry, and forward-thinking food service companies by adjusting their strategies to provide consumers with the foods they want.



Fast-food chains, especially, have led the charge, adding partially or fully plant-based items while marketing them to their respective consumer groups, with items like plant-based burgers and chicken, pizzas with plant-based cheese, or desserts that forgo conventional animal-based milks and eggs. This shift is seeing huge strides in the UK, where more and more popular fast-food chains are improving and increasing their plant-based menu offerings.

In order to assess the landscape of plant-based offerings at fast-food chains in the UK, ProVeg used its scorecard methodology to rank the top-five fast-food restaurants. Data collection took place in mid-February 2023 and points were awarded based on the total and relative values of fully plant-based main dishes, sides, and desserts. The ProVeg ranking also based scores on labelling conventions and menu presentation. This report summarises the ranking results, showcases the contributions the top-five fast-food companies are making to the plant-based food space, and highlights opportunities to capitalise on growing consumer trends in plant-based eating.

We found that the biggest players in the UK fast-food industry are adapting quickly to the changes in eating habits taking place globally, but that there is still plenty of room for improvement. Though the top five are headed in the right direction, there are still unclaimed opportunities, such as offering more fully plant-based menu items, diversifying plant-based options, and improving labelling conventions and menu strategies in order to promote plant-based eating.

The fast-food industry, while adapting to and capitalising on growing demand for plant-based foods, can play a unique role in promoting plant-based eating generally. Leveraging their popularity to promote plant-based eating and positively influence consumer perceptions, the top-five fast-food companies could have significant downstream impacts related to agricultural greenhouse gas emissions and environmental sustainability over time. This is a big reason why we include categories for food-item labelling and menu-design strategies in our scoring system. This report will also briefly discuss these companies' media marketing activities, although this element was not scored in the ranking.

DEFINITIONS & DISCLAIMER

Fully plant-based food is made without animal meat or animal by-products. The term 'plant-based' refers to a product whose ingredients do not include any animal parts or by-products. The term 'fast-food' refers to popular food and beverages rapidly supplied by commercial enterprises, eaten immediately, and affordably priced to meet customers' daily needs. Fully plant-based fast-foods include meat and dairy alternative proteins, egg replacers, and other non-animal substitutes.

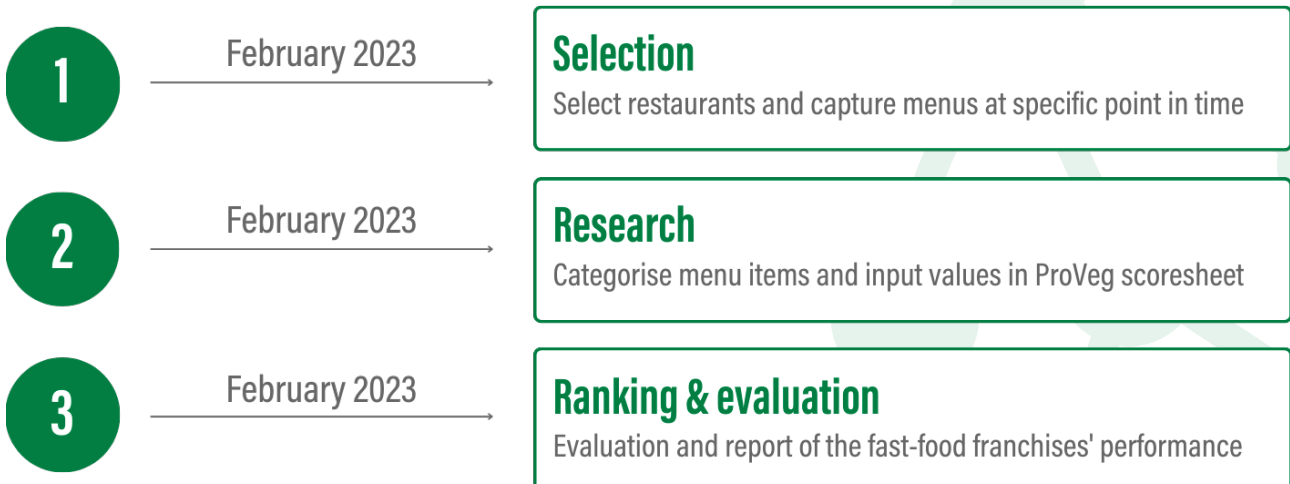
ProVeg's assessment criteria do not examine the food-manufacturing, preparation, and handling processes to ensure that there is no possibility of cross-contamination with animal products. The assessment cannot thus be qualified as an explicitly 'vegan' ranking. For example, the ingredients of a burger that consist of 100% plant-based ingredients, and which would otherwise be considered vegan, cannot be certified as vegan if it is cooked on the same grill as or deep-fried along with meat products. It is worth noting that the majority of consumers buying plant-based are not vegan, and, for many, cross-contamination is not a relevant factor when ordering a plant-based option.

METHODOLOGY

ProVeg determined the results of this ranking based on a defined methodology, which was used to help gather data, categorise, and score each of the fast-food restaurants' standard menu offerings. The selection, as well as the research conducted, was also determined prior to the evaluation and ranking. The following section provides a breakdown of the methodology used to assess and then rank the selected fast-food restaurants.

TIMEFRAME AND STAGES

The assessment method includes several areas of inspection and formulation. The following steps were taken:



SELECTION

The selection criteria were based on a specific type of outlet that serves food to customers in a packaged form for takeaway, with minimal table service available for sit-down. The top-five fast-food chains were identified on the basis of total global revenue. This is because ProVeg intends to use this same data in a forthcoming report that compares the performance of these chains across multiple countries. For the purposes of the present UK report, these five fast-food chains were confirmed to have a minimum number of owned or franchised operations nationwide with a standardised menu of products and ingredients.

RESEARCH

ProVeg conducted the research required to perform the assessment using a standard collection process and ranking tool. All research was gathered and assessed by the ProVeg team, and no stage of the process was outsourced to a third party. Research data collected from each fast-food franchise is publicly available online. We ensured compliance with the selection criteria by referencing company websites. The websites provided standard menu items, ingredient lists, and allergen charts, while any missing data was further investigated and researched by our team.








RANKING

Once the research was complete, a final tally was performed on the score of each restaurant, using a comparison and ranking formula. In the case of two or more restaurants receiving the same score, a tiebreaker condition or formula was applied, allowing for categories with more weight to break the tie between similar values.

EVALUATION

Our evaluation basis includes the standardised ranking criteria created by ProVeg. The following graph breaks down ProVeg's Food Service scoring system.

| CATEGORY | DESCRIPTOR | POINTS |
|---|---------------------------------------|-----------|
|  MAINS | Total fully plant-based mains | 10 |
| | Plant-based percentage of mains | 5 |
|  SIDES | Total fully plant-based side-dishes | 2 |
| | Plant-based percentage of side-dishes | 1 |
|  DESSERTS | Total fully plant-based desserts | 2 |
| | Plant-based percentage of desserts | 1 |
|  LABELLING | Label appeal | 2 |
|  MENU PRESENTATION | Item integration | 2 |
| | Naming convention | 2 |
| | Positive descriptors | 1 |
| | Substitutions | 2 |
| TOTAL POINTS: | | 30 |

MAINS, SIDE DISHES, AND DESSERTS

The three food categories – mains, side dishes, and desserts – were identified as the common meal groups across all restaurants. The evaluation excludes specials, promotional items, seasonal items, and items not available at all locations, instead focusing on the standard meal groups and permanent menu items.

Points were awarded for total number of fully plant-based menu items in the mains, side dishes, and desserts categories. Points were also awarded in proportion to the percentage of fully plant-based items, compared to the total number of items in the mains, side dishes, and desserts categories. Out of these three categories scored, more weight was given to main dishes.

Restaurants that did not have items in a particular food category were given an adjustment score to account for this.

LABELLING

Points were also awarded for labelling practices and menu strategies that are favourable to plant-based menu items, especially in ways that appeal to the largest group of adopters of plant-based eating: flexitarians.

The score for labelling was based on how well the plant-based menu items were identified in terms of accuracy and appeal. The fewest points were awarded to menus whose fully plant-based items could only be identified by their ingredients lists. Menu items had to be clearly labelled with words like 'vegan' or 'plant-based', or represented with a recognisable symbol in order to gain more points in this category. Maximum points for this category were given to menus that used a symbol or pictogram that was easily identifiable but also more appealing to broader consumer groups.

MENU PRESENTATION

Scores were based on how well the plant-based menu items were visually presented. The rationale for awarding points for specific menu-presentation strategies is based on supporting research on the influence of menu presentation, particularly when it comes to plant-based food items and consumer favourability. Restaurants were awarded points for:

Item integration – a point was awarded if the menu integrated fully plant-based items with other items in the menu.

Naming – points were awarded on a sliding scale (from 1-3), depending on how plant-based items were named. Better scores were given for using 'plant' or the brand name of the primary plant-based ingredient; fewer points were awarded for using 'vegan' in the name, as this is less appealing to broader consumer groups.

Descriptors – a point was awarded if fully plant-based item descriptions included appealing words such as 'sizzling', 'juicy', 'original recipe', 'chef's choice', etc, or if they were described as healthier, more sustainable options.

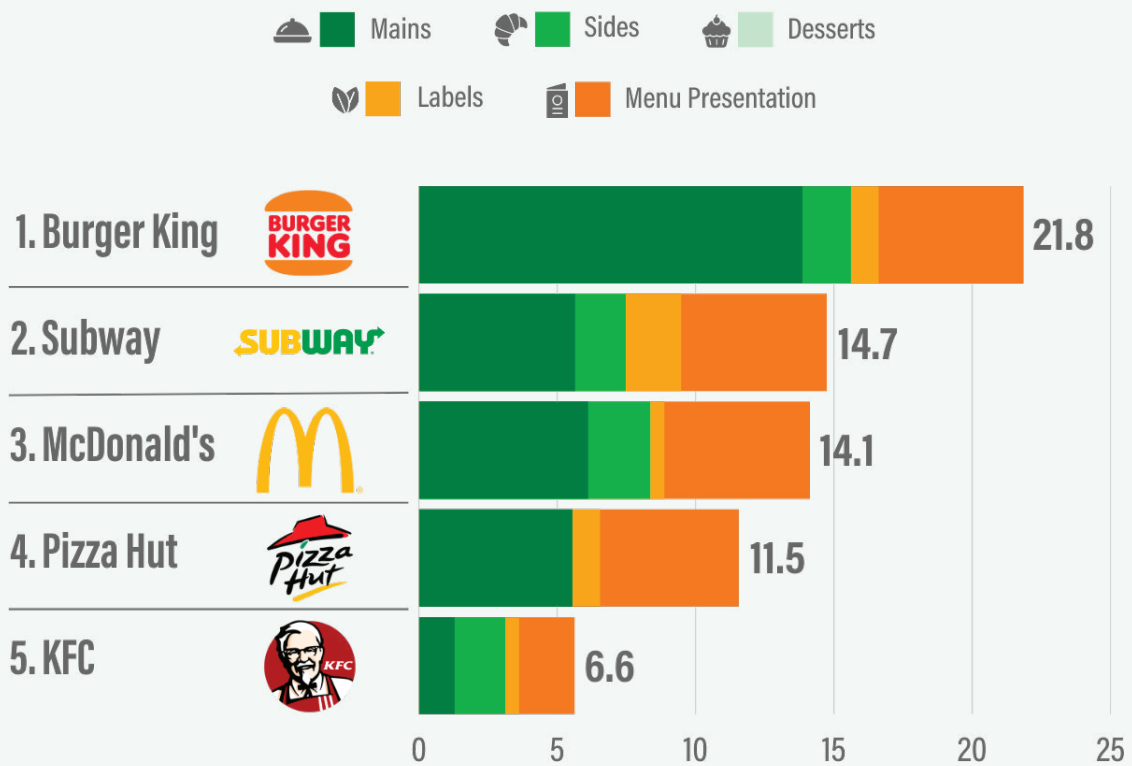
Substitutions – a point was awarded if the menu offered plant-based dips, toppings, dressing, or sauces. An additional point was awarded if the menu explicitly indicated that it is substitution-friendly or that customers can build their own main dishes, so long as there were fully plant-based options available.

The proportion of points awarded in the labelling and menu-presentation categories has increased, compared to previous ProVeg food service rankings. The aim of this new point system is to reflect recent research which suggests that labelling and menu presentation are powerful influencers of consumer behaviour.

RESULTS

The results of our ranking are visualised on the following page, beginning with the final ranking of the current top-five fast-food restaurants in the UK, followed by a more detailed breakdown of scores and performance.

TOP 5 FAST-FOOD RESTAURANTS IN THE UK



MCDONALD'S

McDonald's ranked third among the five major fast-food companies in the UK, receiving a total score of 15 points, which puts it behind Burger King (20 points) and Subway (16 points), but ahead of Pizza Hut (11.5 points) and KFC (7 points). Despite ranking third overall, McDonald's performed best in the side-dishes category, offering fries and fried veggie dippers, as well as pineapple and carrots.

McDonald's was also among the best in the menu-presentation category, alongside Burger King and Subway. They were awarded points for integrating fully plant-based items into the overall menu and for using appealing language such as 'juicy' in its descriptions of these items. In addition to integrating fully plant-based items with animal-based items, McDonald's has vegan and vegetarian sections in their menu. However, it would be beneficial to replace these category names with titles such as 'plant-based' and '100% plant-based'. These sections of the menu would thus remain easily identifiable to vegans and vegetarians while also having greater appeal to consumer groups more broadly.

In the labelling category, McDonald's performance was between decent and good. The company has a certified label reading 'Vegan' for its fully plant-based menu items. This label is not visible when viewing the full spread of menu items, but can only be seen when clicking on a specific fully plant-based menu item for more details. It would be an improvement for McDonald's UK to change its label for fully plant-based items to something like a simple pictogram, which would be just as easily identifiable but more appealing to broader consumer groups.



McPlant



Vegetable Deluxe



Veggie Dippers

SUBWAY

Subway UK was ranked second among the five major fast-food companies in the UK, receiving a total score of 16 points, which puts it just ahead of McDonald's (15 points) and behind Burger King (20 points).

Despite falling short in the number of fully plant-based main dishes, Subway UK scored points for a create-your-own model, in-menu presentation, and in terms of labelling. In particular, Subway's performance was boosted by great labelling. Their use of 'VE' next to the fully plant-based menu items was a key factor in their high ranking. The simple and straightforward labelling of their fully plant-based options helps to attract consumers who are looking to include more plant-based options in their diets but may not necessarily identify as vegan.

The use of such a simple symbol is a powerful tool for fast-food restaurants looking to meet the growing demand for plant-based options, as it helps to clearly differentiate these items from other menu items and makes it more likely that non-vegan consumer groups will choose them. The company's choice of label helped it to score better than McDonald's, which has more fully plant-based items on their menu but does not have a dedicated labelling system.

However, there is room for improvement in the way Subway describes its fully plant-based offerings, as the current descriptions don't appeal to a broad range of customers. For example, the 'Plant Patty' menu-item description reads 'This patty's for plant lovers!' This is not ideal for promoting plant-based eating among broader consumer groups. A more appealing description that targets a wider audience could lead to higher scores in future rankings.



Crinkle Wedges



Plant Patty

BURGER KING

Burger King ranked first among the five major fast-food companies in the UK, receiving a score of 20 points out of 30.

The company's UK menu performed exceptionally well in the mains category, having recently introduced versions of their plant-based items with La Vie's plant-based bacon as permanent fixtures on the UK menu, bringing them up to nine fully plant-based main dishes. Burger King did not skimp when it came to using appealing descriptors for their fully plant-based items, describing the Vegan Royale as having a 'crispy vegan patty' and the Plant-based Bacon King as being 'layered with slices of smooth vegan cheese'. Using such positive descriptors is an easy and effective way to promote plant-based menu items – and this is reflected in their score.

Burger King UK uses both 'vegan' and 'plant-based' in the names of their fully plant-based items. This approach is used to differentiate between items that are cooked on the same surface as animal-based foods and those cooked on their own surface. Although this approach is great for vegan consumers, it can be confusing for broader consumer groups.

Burger King UK's labelling practices are similarly confusing, as they use the unique Vegan Society 'Vegan' label for some fully plant-based items and the 'Plant-Based' label for others. For example, the photo of its 'Plant-based Whopper' has a green graphic in the top right corner reading 'plant-based', while the photo of its 'Vegan Royale' has a brown graphic in the

top left corner reading 'Vegan.' Like their mixed use in naming, the mixed use in labelling can be confusing to many consumers, and while the use of the 'Vegan' label is a good convention, the uniform use of the 'Plant-Based' label would earn more points.



Plant Based
Bakon King Double



Plant Based
Whopper



Vegan Royale

PIZZA HUT

Pizza Hut was ranked fourth among the five major fast-food companies in the UK, receiving a total score of 11.5 points, putting it ahead of KFC (7 points) but behind Subway (16 points), McDonald's (15 points), and Burger King (20 points).

Pizza Hut's approach to labelling their vegan options could be better, as they use a small graphic label that reads 'Vegan cheese now available' on the lower-left corner of the photos of their 100% plant-based items. This helped them secure a decent score in our ranking, outperforming KFC which does not label vegan options on the menu. However, Pizza Hut still falls short. It's unfortunate that Pizza Hut does not extend their labelling efforts to other menu items, such as sides and desserts, since it's impossible to determine if these items are vegan without contacting the restaurant directly. This is because Pizza Hut neither applies the relevant labels throughout the entire menu nor lists ingredients on their website.

The side dishes offered by Pizza Hut UK are a bit of a mystery. It is possible that the side salad is fully plant-based, but this cannot be confirmed as they do not label or list ingredients for it. Additionally, evaluating the side dishes was difficult as many of them are similar, with only slight differences such as piece count, sauce, and breading. In this analysis, multiple items were counted as one if the only difference was sauce or flavouring, and counted as separate if the difference was piece count, breading, or the addition of a substantial ingredient, such as cheese or bacon bits.

Like most of the other companies in this ranking, Pizza Hut UK's online menu integrates plant-based offerings with animal-based offerings. The company uses 'vegan' as a descriptor in the names of its 100% plant-based pizzas and 'veggie' as a descriptor in the names of its vegetarian dishes, such as the Vegan Margherita and Vegan Veg Sizzler, and the Veggie Sizzler and Vegetable Supreme. They could earn more points here by using names that are more appealing to broader consumer groups. They could also earn more points by using positive descriptors in the details of their fully plant-based items, like Burger King does.

Pizza Hut UK does have a 'Create Your Own' model made explicit on the online menu, which earns them points in menu presentation. However, they could earn more points by increasing their plant-based menu options, both in terms of main and side dishes.



Vegan Margherita



Vegan Veg Supreme



Vegan Beyond Italian Style Sausage Supreme

KFC

KFC UK received the lowest score among the top-five fast-food companies at seven points. Their menu needs improvement in all categories, but especially in the areas of mains, labelling, and menu presentation.

In terms of item integration, KFC UK has a separate 'Vegan' section on their menu and does not integrate fully plant-based items with their other menu counterparts. This is great for vegans but is less appealing for broader consumer groups. In this special section, they offer only one fully plant-based option. KFC must increase their fully plant-based options if they want to keep pace with their competitors and promote more sustainable and climate-friendly eating.

The naming of KFC UK's one fully plant-based option is also an opportunity for improvement. They call it the 'Original Recipe Vegan Burger.' The use of the descriptor 'vegan' in the name is a start, but using 'plant-based' in the name instead would appeal to more consumers. KFC UK does include a positive descriptor 'Original Recipe' in the name, which earned them a point.

They also offer three fully plant-based dips, earning them a point. However, they could earn more points if they adopted and conveyed a substitution-friendly model for those looking to make a fully plant-based meal using their plant-based chicken patty.

In terms of side dishes, KFC UK does offer vegan options such as fries, corn, and regular beans, but they are not labelled as such nor are they included in the 'vegan' section of the menu. This makes it difficult for customers to identify which side dishes are vegan without downloading a large and overwhelming ingredients list.



KFC Vegan Burger

MARKETING ACTIVITIES

The following is a brief overview of the marketing activities of the top-five fast-food companies in the UK. It's important to note that these activities were not scored in the ranking due to a lack of objective methodological options. In addition, the activities covered here are not comprehensive due to limitations in time and resources. While marketing activities were not included in the ranking, they are significant in terms of promoting and influencing consumer perceptions. As such, it's important to assess their efforts here.

In order to do so, ProVeg looked at the websites and social-media accounts of the top-five fast-food companies in the UK, dating back to August 2022. The number and appeal of posts were evaluated, with more emphasis given to posts that had an appealing graphic and even more so if the graphic clearly conveyed that the post was promoting a plant-based option or plant-based eating more broadly.



Burger King appears to be doing the best job among the top-five fast-food companies in the UK in terms of promoting their fully plant-based options. The company has several social-media posts across multiple platforms dedicated to promoting their vegan items, and they currently promote burgers with their plant-based bacon at the top of their home webpage.

Pizza Hut is doing a decent job of promoting its plant-based products, but it also has several social-media posts heavily promoting animal-based meat, like one during Veganuary about 'Meat Feast Mondays,' seemingly promoting eating only meat on Mondays. That said, Pizza Hut UK has some very attractive social-media posts dedicated to promoting its vegan options, though some of the graphics could be improved to explicitly identify the plant-based options in the photos. They might also leverage their home webpage space to nudge consumers toward their plant-based menu items.

McDonald's is also making an effort to promote its plant-based options, with a Double McPlant post on Instagram and promotion at the top of their home page. However, compared to the other companies, their promotion could be more prominent. Their 'social media' posts promoting plant-based items are a drop in the bucket compared to overall quantity of posts.

Finally, KFC and Subway are not doing a great job of promoting their plant-based options. KFC has not posted anything about fully plant-based options on Twitter, LinkedIn, or Instagram in the last six months, and there are no activities on their websites promoting plant-based items. Subway also has no recent posts on Twitter or LinkedIn promoting their plant-based options and only one post on Instagram in January, mentioning its Plant-Based Teriyaki Steak Sub. However, the fact that the Steak Teriyaki Sub was fully plant-based was buried in the post's text and not included in the attention-grabbing graphic.

CONCLUSION

The results of this ranking indicate that there has been definite growth and inclusion of plant-based options by the largest global fast-food chains. By far, the largest opportunity for plant-based food adoption currently sits with meat-eating and flexitarian consumer groups, who may not be motivated by animal ethics, but are interested in trying these options for other benefits, such as sustainability or health.

For many of the restaurants surveyed, simply replacing one of two ingredients, like meat or dairy, would result in several of their menu items being considered fully plant-based. This would appeal to the growing plant-centred market and flexitarians more attracted to a preponderance of options. As the plant-based industry is continually growing, and people are becoming accustomed to meat alternatives, the fast-food industry in the UK should consider partnering with, or expanding partnerships with, a variety of food manufacturers and retailers which are starting to expand in this space.

There is a burgeoning number of plant-based meat-alternative food manufacturers that are established in the UK market. Large retailers across the UK are also rushing to produce quality plant-based meat-alternatives to establish footing in this market. This period provides an excellent opportunity to cement new relationships in the plant-based industry and establish the UK as a strong plant-based fast-food player internationally.

FUTURE RESEARCH

ProVeg will be releasing and updating fast-food restaurant rankings annually and is constantly looking at ways to improve our processes and our methodology. We also intend to publish rankings for other types of food services. Companies or organisations that are interested in collaboration on research can contact us at corporate@proveg.com.

ACKNOWLEDGMENTS

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