<u>Barbecue cuisine in the fast-casual and casual dining sectors of the British restaurant industry.</u>

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Introduction

This essay provides a critical analysis of literature surrounding the rising provenance of traditional, American-style barbecue food and the growth of the casual and fast-casual dining sectors of the British restaurant industry. This is relevant for the British food, restaurant and leisure industries to capitalise on new trends, or refining existing ones to meet the demands of the consumer.

This essay argues that the literature reveals a positive trend in the popularity of 'authentic barbecue' food in conjunction with the rise in casual and fast-casual dining. Understanding what 'authentic barbecue' is, its history, and its growth alongside casual and fast-casual dining presents opportunities for the British food industry. Especially for independent and smaller food outlets, as 'authentic barbecue' is best suited to smaller scale production. This possibly explains the lack of 'authentic barbecue' in the fast-food and mainstream sectors of the food industry.

<u>What is 'authentic barbecue'?</u>

"*[Barbecue] is one of the most intensely debated topics in American popular culture*." (Lovegren, 2003).

The word barbecue comes from the Spanish word '*barbacoa'*, the Spanish explorers' interpretation of the native Caribbean word '*babracot*', the wooden frame used to cook meat over a low heat for long periods of time (Lovegren, 2003). 'Authentic barbecue' today is akin to the cuisine that developed in the southern states of America by the poorer white settlers and slaves from the 17^{th} Century onwards, who were "*trying to turn a large, tough, gnarly cut of meat into something tender and succulent*" (Lovegren, 2003). This essay defines 'authentic barbecue' as the cooking of meat over live coals, using wood that produces smoke, for a long period of time at low temperatures. Menu items typical of this cuisine include brisket, burnt ends, pulled pork and ribs (short, spare and back).

The association of barbecue food with poor workers and slaves using cheap cuts of meat and primitive cooking techniques, meant it was typically *"celebrated quietly by them at sociable back-yard get-togethers and in smoky roadside joints that weren't always in the phone book."* (Lovegren, 2003). Barbecue food has historically lacked appeal in the mainstream restaurant industry; unpopular at the high-end due to its association with peasants and slaves, and unviable for fast-food outlets due to the long preparation and cooking time, anywhere up to 14 hours. However, once bottled 'barbecue sauce' infused with smoke flavouring became available 'barbecue food' could be produced by simply adding the sauce to normal menu items (Douglas and Munro, 2016, p.6). This meant 'barbecue food' could be served without the long and costly lead in time, making it popular in more mainstream dining sectors and what most people today will recognise as 'barbecue food'. However, this is a far cry from the origins of barbecue and what is considered 'authentic'.

Casual dining vs Fast-Casual

In general, 'casual dining' includes full table service (for example; Pizza Express, TGI Fridays and Zizzi), with 'fast-casual' consisting of limited or no table service (for example; Nandos, Five Guys and pub chains such as JD Wetherspoon) (Jones, 2014). A high quality of food and comfortable, atmospheric surroundings are common to both; however, with fast-casual, service may be quicker but with a more limited and cheaper menu. Despite these differences, the literature uses the two terms interchangeably. Whilst some sources use both terms to describe the same sector (for example NPD, 2014), others refer to the same brand using different terms; for example Red's True Barbecue is considered 'casual dining' by Horizons (2016a) but 'fast-casual' by Howarth, (2014). This essay considers 'casual dining' and 'fast-casual' the same sector of the dining out market, but employs the terms as used by the relevant pieces of literature.

Trends in barbecue food, and the casual and fast-casual dining sectors.

Trends in 'authentic barbecue' food.

American style cuisine, including that marketed as 'barbecue', has been a feature of the British dining out market for decades, one just has to look at the number of American diners, burger bars and American restaurant chains. However, the quote below indicates that over the last seven years North American and barbecue cuisine has been an area of significant growth.

"*There has been a clear shift in trends to North American, burger and BBQ/ Steak restaurants, with an 80%, 71% and 52% increase in restaurants since the financial crisis, respectively.*" (Savills, 2016, p.5).

Italian and pizza outlets are still the most popular cuisine in Britain (by numbers of restaurants) but the vast proportion of these existed prior to the recession (Savills, 2016, p.5). The significance of the figures above is that 'North American, burger and BBQ/ steak' restaurants are the three types of cuisine that have had the biggest growth since the start of the recession. This could mean the market is becoming saturated; however, with Italian and pizza accounting for 1915 restaurants and the 'growth' cuisines combined totalling 777, it is likely there is potential for further growth with the latter. This is supported when one considers that only 31 brands make up the 1915 Italian and pizza restaurants, with 'growth' cuisines' covering 777 restaurants with 47 brands. Having less outlets overall and per brand means the 'growth cuisines' are likely to be more diverse and have more potential for market penetration.

The growth of American and mainstream barbecue food does not necessarily include 'authentic barbecue', but in addition to recession tastes for comfort food, there are brands developing preparation and cooking methods of barbecue menus that are more akin to 'authentic barbecue'. The quotes below indicate how these developments may account for some of the growth in the area of American and barbecue food as a whole.

"*Although American food isn't new to UK menus, the cuisine is gaining in popularity thanks to operators upgrading the concept with barbecue pits and smokehouses.*" (QuickBite, 2016: p44).

"*American-style restaurants such as barbecue pits, smokehouses, burger bars, and diners could be about to replace Mexican outlets as the biggest growth area on the UK's eating out scene over the next few years.*" (Horizons, 2016a).

Horizons (2016b, p.9) identifies "*Low'n'Slow: New Wave Americana*" as one of six 'developing' menu trends.[1] It notes the use of "*pit smoked terminology (rubs, marinades, curing, smoke time)*" as well as "*micro-regionality communicated through dish naming (Tennessee, Carolina, Louisiana)"* and food "*inspired by the 'low'n'slow' cooking of the deep south"* as evidence of the

[1] The report defines 'developing' menus as 'early adopters', which have grown from innovators in the 'emerging' menu but are not yet 'established' with an early majority. Developing menus have "*more operators open in the same niche, innovators growing sites and occasional appearances on mainstream menus*." (Horizons, 2016b, p.14).

progression towards more 'authentic barbecue' cuisine. This is further supported by the 800 per cent increase in menu appearances of brisket and 300 per cent increase in short ribs, both typical 'authentic barbecue' menu items, in Britain over the last year (Horizons, 2016b, p.20). The report goes on to state that *"smokehouse chains such as Red's True Barbecue, Grillstock, Bodeans and Porky's BBQ have made American barbecue a top trend amongst emerging operators"* (Horizons, 2016b, p.20).[2] A separate report from the same source identified Red's True Barbecue and Grillstock respectively as the 6th and 7th fastest growing restaurant brands across the UK (Horizons, 2016a).[3]

So this is 'what' has happened, but 'why'? One food industry publication believes the increase in popularity of American barbecue cuisine "*began with American 'dude food' as comfort food in the recession, especially as it's comparatively cheap*" (QuickBite, 2016, p41). Comfort food is a reasonable explanation for the increasing appeal of American barbecue, as the Savills (2016) report identified the rise in this cuisine with the onset of the recession. It is also the same time that Britain saw casual and fast-casual dining (also 'comparatively cheap') emerge and see significant growth.

Trends in fast-casual and casual dining.

Casual dining outlets saw an 11.6 per cent increase in visits from 2009-2014, which compared favourably to the overall dining out market which fell by 4.8 per cent over the same period, and the full-service sector[4] which fell by 11.4 per cent (NPD Group, 2014). The rise of casual dining has been linked to the recession, where people still wanted to eat "*quality food at good value for money while avoiding the unhealthy stigma attached to traditional fast food outlets*" (Howarth, 2014). The increased ambiance offered by casual dining outlets compared to fast food outlets, but without the waiting time and price of a more formal full-service restaurant, is also likely to have appeal.

A market research report forecasting food trends stated casual dining its top "*six 'star' player*"[5] (NPD Group, 2015). It also predicted "*casual dining will outgrow all other channels and achieve spend of well over £5billion by the end of 2016*". It attributes this growth to the consumer

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[2] The author notes that brands which have emerged in this 'barbecue pit', 'low and slow cuisine' and 'smokehouse' sector in recent years include 'Grillstock' (which started as a festival in 2010 and since 2012 has opened six outlets), 'Smoke BBQ' (first opened in Sheffield in 2013 and now has three restaurants), and the most prolific of the three 'Red's True Barbecue' (which first opened in Leeds in 2012 and now has eight branches across the UK).

[3] The data only included brands with between five and 25 outlets.

[4] Full-service restaurants are the "*more formal/ traditional restaurants and those serving Greek, Indian, Japanese, French and Italian food, as well as Chinese, Thai, Vietnamese, Mexican and Spanish restaurants*." (NPD, 2014).

[5] The other five included "*quick-service operators serving chicken, pizza/ Italian, burgers and coffee, and hotels*." (NPD Group, 2015).

demand for "*'newness and diversity' with the opportunity for a 'family orientated treat'*", that casual dining is able to offer.

Recent figures indicate that although casual dining brands have seen a 4.3 per cent increase in sales the year leading up to August 2016, like for like sales over the same period have only increased by 0.8 per cent (CGA Peach, 2016, p.6). This is made explicit when the report concludes that "*casual dining brands in particular have been relying on new openings for the bulk of their growth*." This is further evidenced by a 5.6 per cent increase in the number of managed restaurant outlets in the last year (CGA Peach, 2016, p.7). Although this does not account for the entire casual dining out market, it is likely indicative of the trend for growth in sales by increasing numbers of outlets as opposed to increasing sales in existing outlets.

Discussion

There is evidence in the literature that supports the increasing popularity of barbecue food as well as fast-casual and casual dining in the British restaurant industry. However, if this growth is unsustainable there could be cause for concern, possibly indicated by the disparity between increases in overall sales and like for like sales. It is also possible that as growth was linked to the recession, an improvement in the economy could have a negative impact. However, this seems unlikely due to the diverse appeal of casual and fast-casual dining from food quality and atmosphere in addition to value for money.

As the literature includes articles from industry publications (e.g. Quickbite, 2016), and supporting industries such as retail property (Savills, 2016) there is a risk of bias as motives for publication cannot be assured. However, in addition to their own research, Savills (2016) used data from at least three independent market research companies (CGA Peach, NPD Group and Horizons), the latter of which QuickBite (2016) also used. The same market research sources above also appeared in other publications (for example, The Caterer, 2014) which the author discounted to reduce the risk of false confirmation. Whilst the widespread use of the same market research data indicated it had been collected independently (and not for a single organisation on a specific agenda) it did highlight an overall lack of robust, primary research in the field.

Despite the risk of bias in industry publications it would still be in publishers' interests to provide accurate data, not least for their future credibility. However, as a critique of methodology, Savills (2016) limits the metrics to number of outlets, does not provide figures for revenue or profit and does not account for independent brands; all of which could have been better measures. The more qualitative report by QuickBite (2016) quotes industry representatives and is therefore at greater risk of bias. The report makes attempts to address this with a reference to data from an independent source, in this case Horizons, but further detail on the exact reference are not given.

A critical review of *possible* issues with the literature is one thing, identifying *specific* discrepancies between the literature that cannot be rectified, would better determine the credibility of the literature; two such discrepancies are discussed.

Firstly, QuickBite (2016) describes an "*exponential rise in the popularity of pulled pork*" whereas Horizons (2016b, p.23) asserts there have been 22 per cent less instances of pulled pork on menus compared to the previous year. Whilst QuickBite (2016) does not describe what has measured the 'exponential rise' (or indeed over what time period), Horizons (2016b, p.23) is also found lacking in its failure to put the 22 per cent decrease in context of the 21900 per cent(!) increase of the same food item since 2010, contained in the same report. So depending on how the data is viewed, neither source is necessarily wrong, but both have not reported the true picture fully, or were not aware of it.

Secondly, whilst Savills (2016, p.5) reports that North American cuisine has had the biggest growth since 2009, Horizons (2016b, p.11) indicates a 10 per cent downwards trend. One explanation is that the reports measure separate indices; Savills (2016) on new outlets, and Horizons (2016b) on menu instances. However, a separate report by Horizons (2016a), which does use growth in outlets as a metric, sees American-style restaurants[6] feature prominently among the fastest growing brands, which correlates with the Savills (2016) report. So, either there is disparity between two reports from the same publisher (Horizons), there was a change in trends between the reports, or a more nuanced explanation is required. There is evidence for the third explanation in the latter Horizons report (2016b), which puts the 10 per cent decrease in American cuisine in context of the rising trend in what it terms "*Low'n'Slow: New Wave Americana*", a theme very much akin to 'authentic barbecue'. So although American cuisine might be 10 per cent down overall, a sub-category of this cuisine is increasing.

[6] These include those associated with 'authentic barbecue' such as Red's True Barbecue and Grillstock.

Conclusion

This article has presented evidence for a growing trend in Britain for American style 'authentic barbecue', not only this but there are likely to be synergies in this trend and the increasing popularity of fast-casual and casual dining. Whilst the articles have provided evidence for these trends no literature was found that argued against them. So either the trend is so strong or the literature is industry-led and focuses on the positive trends; the latter appears most likely.

There are also other growth food trends aside from barbecue, some of them mentioned in the same literature reviewed in this article; Caribbean (Savills, 2016, p.5) Eastern Mediterranean, Middle Eastern and Mexican Street food (Horizons, 2016b, p.9) are but a few. Therefore, further research is required to see how barbecue fares against other food trends, especially as other trends like 'lifestyle cuisine' (Horizons, 2016b, p.18) and 'ethical considerations' (NPD Group, 2016) are not ones traditionally associated with barbecue food! What 'authentic barbecue' offers, is food that cannot be easily made at home or cost-effectively mass-produced, meaning 'authentic barbecue' in fast-casual and casual dining is an area worthy of interest.

These findings are useful for those involved with or interested in food outlets. These include: those looking to start a food service; street food vendors looking to make the step into a bricks and mortar establishment; investors looking to fund food businesses; independent outlets looking to expand their business, and existing chains looking to stay ahead of the competition. It is noteworthy that many of these stakeholders are not considered in much of the literature, therefore research is also required on barbecue in the quick-service restaurant sector, street food, independent brands and small chains.

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