

CHICKEN 2035: Anticipating TRENDS, Adapting STRATEGIES

**CHICKEN
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July 29-31, 2024

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State Of The Restaurant Industry



Restaurants Are Feeling The Pressure

Quick-Service Trends for June 2024

Year-Over-Year Performance

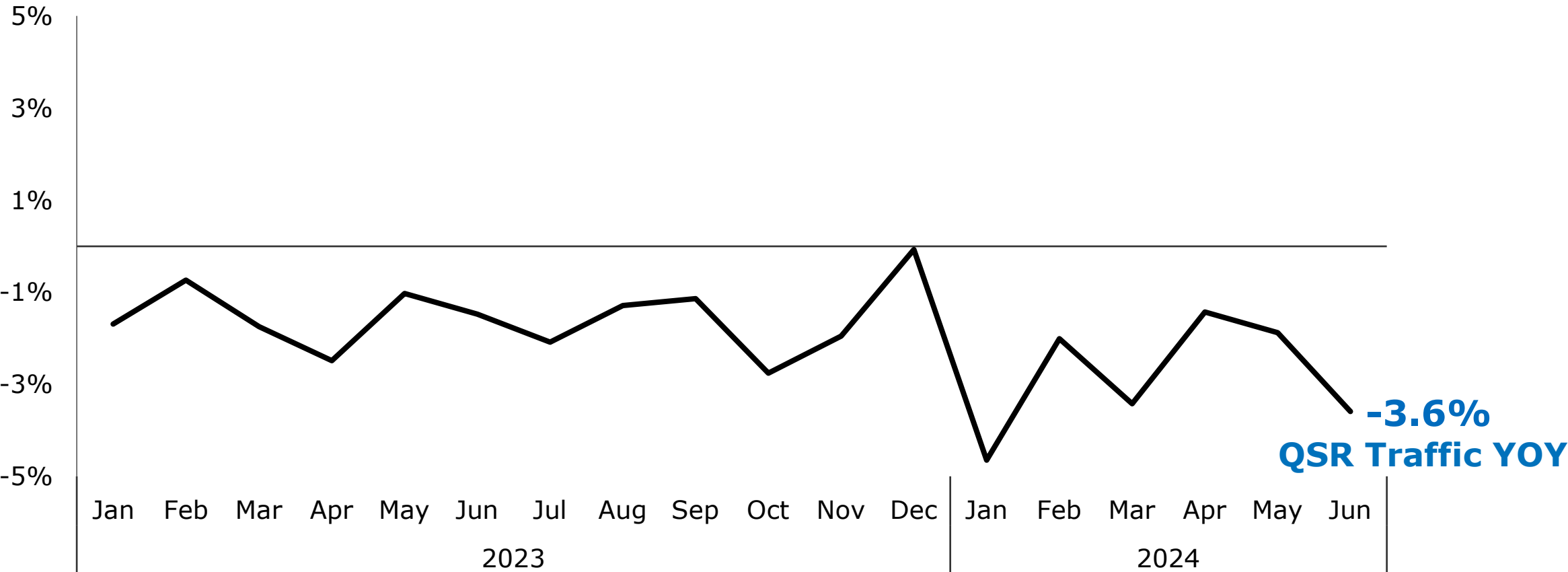
+0.6%
Net Sales

-3.6%
Traffic

+4.4%
Avg. Check

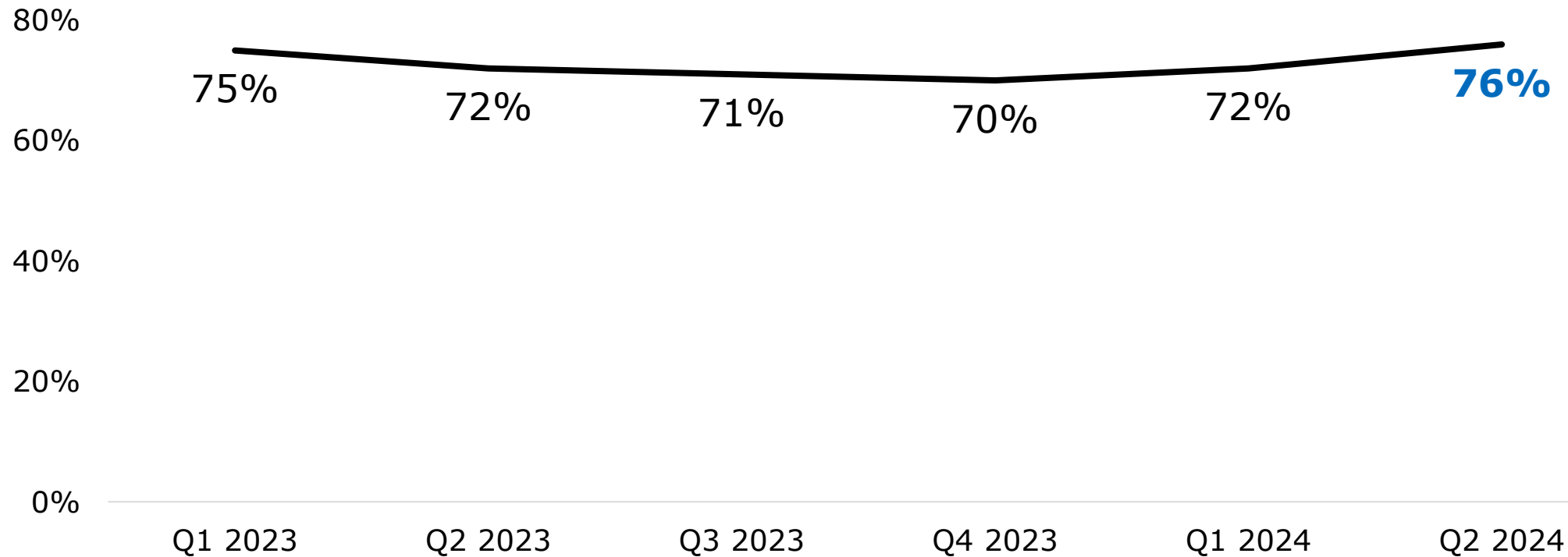
+3.1%
Avg. Price

Fast Food Traffic Continues To Decline



Consumers Remain Price Sensitive

Share of respondents that feel they are **paying higher restaurant prices** in the past month



39%

are **spending**
less on
restaurants

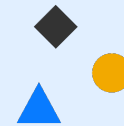


Of those spending less,

57% are **ordering less often**
from restaurants

47% are choosing **less**
expensive restaurants

46% are ordering **less expensive**
items



When it comes to chicken products:

- The "Chicken Wars" that started in 2019 spiked demand for chicken items, especially sandwiches, across fast-food brands. While general QSRs have seen a slight decline in chicken demand since then, **chicken-focused brands have grown in popularity.**
- Chicken's popularity is **boosted by cost-effectiveness**, allowing higher profit margins.

What does Gen Z want from chicken foodservice?



In June, RMS surveyed 1,000+ US consumers about their **chicken preferences at restaurants**

Respondents were asked which **chicken products** they would most likely order



Overall, The Top 3 Chicken Products At Fast Food Concepts Are:

#1. Chicken tenders



#2. Chicken sandwiches



#3. Bone-in fried chicken



Chicken Insight

Preferences vary across generations



Gen Z Ranks Breaded Wings in Their Top 3



Gen Z

1. Chicken tenders
2. Chicken sandwiches
- 3. Breaded wings**

And Preferences Vary Across Generations



Gen Z

1. Chicken tenders
2. Chicken sandwich
3. Breaded wings



Millennials

1. Chicken sandwich
2. Chicken tenders
3. Boneless wings



Gen X

1. Chicken tenders
2. Chicken sandwich
3. Bone-in chicken



Boomers

1. Chicken sandwich
2. Chicken tenders
3. Bone-in chicken

**Next, respondents were asked
which fast food brands they most
frequent for chicken products**

The Top 10 Most Visited Brands Are:

#1. Chick-fil-A

#6. Raisin Cane's

#2. Popeyes

#7. Wingstop

#3. KFC

#8. Zaxby's

#4. McDonald's

#9. Church's

#5. Wendy's

#10. Bojangles

Chicken Insight

Brand preference also vary by generation



Brand preferences vary across generations



Gen Z

1. Chick-fil-A
2. McDonald's
3. Popeyes



Millennials

1. Chick-fil-A
2. Popeyes
3. KFC



Gen X

1. Chick-fil-A
2. KFC
3. Popeyes



Boomers

1. Chick-fil-A
2. KFC
3. Popeyes

What about the next generation of customers?



Chicken Insight

Family households with Generation Alpha children offer insights into future trends



The Top 3 Chicken Products For Families Are:

#1. Chicken sandwiches



#2. Chicken tenders



#3. Boneless wings



Preferences Vary By Households with Different Kids Age Groups



HH Children 3-6 Yrs

1. Chicken sandwiches
2. Chicken tenders
3. Boneless wings



HH Children 7-11 Yrs

1. Chicken tenders
2. Chicken sandwiches
3. Boneless wings

Brand Preferences Also Vary



HH Children 3-6 Yrs

1. Chick-fil-A
2. KFC
3. Popeyes & McDonald's



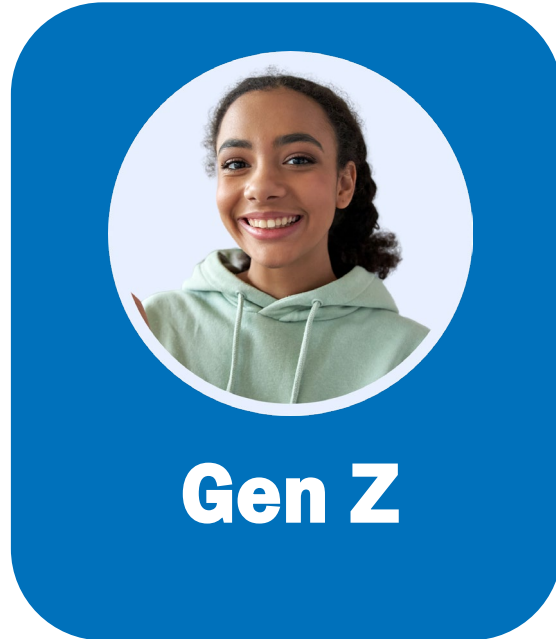
HH Children 7-11 Yrs

1. Chick-fil-A
2. Popeyes
3. KFC

How can brands get the most out of their chicken categories?



Embrace Gen Z



- Chicken enthusiasts
- Favor personalization
- Love sauces

Continuously Innovate



- Chicken versatility enables launch of new items
- Seasonal limited-time offers
- Bold new flavors

Protect Your Value Proposition



- Launch new items with deals
- Lower costs compared to other proteins
- Leverage daypart opportunities

Chicken Presents Traffic-Boosting Opportunities

- Enhanced flavors
- Versatility
- Healthier customer perception
- Daypart opportunities



Thank You

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