

# Chicken sandwich wars, inflation edition



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# Key findings I

## Americans love fast food

- 80% of consumers eat fast food at least once a month, with over 40% doing so four or more times monthly.
- Frequent QSR visits are driven by younger generations: Over 45% of consumers under 45 eat fast food more than four times per month.
- By contrast, just 19% of adults 56 and older report the same frequency — highlighting a sharp generational divide in fast food habits.

## Income plays a role in fast food frequency over the past year

- High-income consumers are driving the increase in fast food visits: 29% of those earning \$100K–\$149K and 28% of those earning over \$150K say they're eating fast food more often than a year ago.
- Meanwhile, 40% of those earning less than \$50K say they're eating fast food less often — a higher rate than any other group.



- The South and West regions eat the most fast food — with 10% of consumers in these regions reporting to eat it more than 10 times per month.
- In contrast, the Northeast is more restrained: 1 in 4 say they eat fast food less than once a month.
- McDonald's dominates every region, with roughly two-thirds of consumers across the South, Midwest, West and Northeast visiting at least once per month.
- But after McDonald's, preferences vary:
  - In the **South**, Chick-fil-A is the #2 fan favorite, followed by Taco Bell and Burger King.
  - In the **Northeast**, Burger King outpaces Taco Bell and Wendy's for weekly visits.
  - In the **Midwest**, Taco Bell and Wendy's take the #2 and #3 spots.
  - In the **West**, Taco Bell is tied with McDonald's in monthly visits, and Chick-fil-A edges out Wendy's as a weekly favorite.
- Taco Bell is a widely visited brand — but more of an occasional indulgence than an everyday habit. Over half of consumers (51%) say they visit Taco Bell at least once a month, making it the #2 QSR by monthly visitors. Yet only 21% visit weekly or more, a lower "fan favorite" score than McDonald's (33%) or even Chick-fil-A (20%), suggesting it plays a more treat-like role in consumer routines.



# Key findings III

## Consumers are willing to spend — but they still expect value.

- Nearly half (48%) say \$5–\$8 is the sweet spot for a fast food meal. Another 21% are only willing to spend under \$5, especially among lower-income consumers.
- In fact, one-third (33%) of people earning under \$50K say a fast food meal should cost less than \$5 to feel like a good deal.

## Delivery app usage and BNPL

- Younger consumers are significantly more likely to order fast food through apps. While 69% of consumers aged 56–75 say they never use delivery services like DoorDash or Uber Eats, only 18% of 18–25-year-olds say the same. In fact, nearly half of consumers under 35 order fast food for delivery at least occasionally each month.
- **Frequent delivery users are driving adoption of BNPL for fast food.** Just 5% of all consumers say they order fast food for delivery multiple times per week — but among them, 60% have used a “Buy Now, Pay Later” service like Klarna or Afterpay to pay for it. This suggests BNPL is gaining traction in high-frequency, convenience-driven ordering moments.



# Key findings IV

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## Premium menu drops spark curiosity — with limits.

- 30% of consumers say they're *excited* to try premium items like wagyu burgers or truffle fries.
- But another 35% admit they're "curious but skeptical," and 23% say they think these offerings are overpriced or gimmicky.

## Affluent households and parents are more open to high-end fast food.

- 41% of consumers earning \$100K–\$149K and 43% of those earning \$150K+ say they're excited to try premium fast food.
- Among parents, excitement jumps to 42%, compared to just 22% of non-parents.

## Chick-fil-A leads on premium brand permission.

- 53% of consumers say Chick-fil-A can credibly offer upscale or premium fast food.
- McDonald's (36%), Wendy's (33%), and Burger King (30%) follow — but no other brand breaks above 30%.





# Key findings V

## The line between QSR and casual dining is getting blurrier.

- 30% of consumers say they'd opt for a casual dining meal over fast food if prices were similar. Another 35% say "it depends on the occasion" — a reminder that price parity raises expectations for experience and quality.

## Fast food is no longer just about saving money.

- Just 14% of consumers view QSR as a budget-friendly option.
- Instead, 23% describe it as a treat or reward, and 20% call it a guilty pleasure — signaling a more emotional, experience-driven role.

## Takeaway:

Consumers want to feel good about what they're buying — whether that means low prices, indulgence, or something "worth it." QSR brands that can meet those expectations across segments will be best positioned to win.



CHICKEN SANDWICH WARS, INFLATION EDITION

# Audience demographics

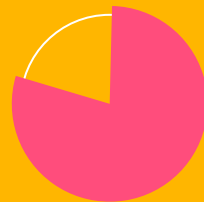




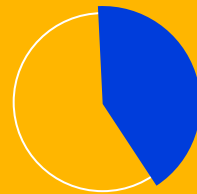
# Demographics

Nationally representative sample of 3000 consumers taken in July 2025

- Respondents are 50% male and 50% female
- Household income:
  - < \$50,000/ yr: **41%**
  - \$50,000-\$99,999: **32%**
  - \$100,000-\$149,000: **15%**
  - > \$150,000: **8%**
  - Prefer not to say: **4%**
- Age Groups:
  - 18-25: **24%**
  - 26-35: **21%**
  - 36-45: **23%**
  - 46-55: **21%**
  - 56-75: **11%**



**80%** order fast food at least once per month.



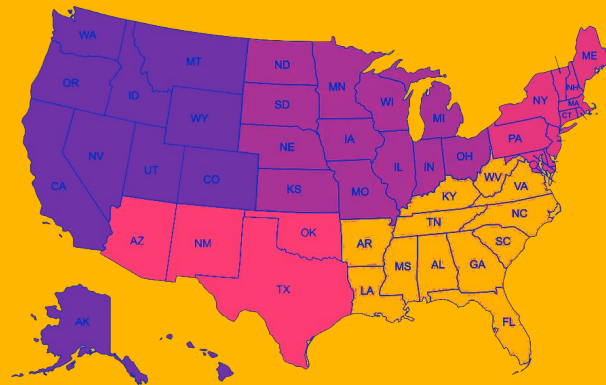
**40%** have children 18 years and younger living with them.

Midwest: **18%**

Northeast: **20%**

South: **45%**

West: **18%**



# Purchase habits



# Most Americans eat fast food monthly, especially in the Midwest and South

- Four in five (80%) Americans eat fast food at least once per month, and 43% do so four or more times monthly — signaling strong ongoing demand.
- The Midwest leads in broad monthly engagement (82%), while the South and West have the highest share of heavy users (8+ times/month). In contrast, 25% of Northeasterners rarely visit QSRs, making them the most occasional eaters by region.

| How often do you eat fast food in a typical month? |       |         |           |       |      |
|----------------------------------------------------|-------|---------|-----------|-------|------|
|                                                    | Total | Midwest | Northeast | South | West |
| < once per month                                   | 20%   | 18%     | 25%       | 19%   | 20%  |
| 1-3 times per month                                | 39%   | 44%     | 38%       | 38%   | 37%  |
| 4-7 times per month                                | 26%   | 26%     | 23%       | 27%   | 25%  |
| 8-10 times per month                               | 8%    | 7%      | 8%        | 8%    | 7%   |
| >10 times per month                                | 8%    | 6%      | 6%        | 9%    | 11%  |

# Fast food habits are largely consistent year over year

- 1 in 5 consumers (20%) say they're eating fast food more often than a year ago, while four in ten (39%) report no change — suggesting consistent demand.
- The West stands out: 23% of Western consumers say they've increased their fast food visits — higher than any other region — while Midwesterners are most likely to say they're eating it less (37%).

| Compared to one year ago, how often are you eating fast food? |       |         |           |       |      |
|---------------------------------------------------------------|-------|---------|-----------|-------|------|
|                                                               | Total | Midwest | Northeast | South | West |
| More often                                                    | 20%   | 18%     | 20%       | 20%   | 23%  |
| About the same                                                | 39%   | 41%     | 41%       | 41%   | 40%  |
| Less often                                                    | 26%   | 37%     | 33%       | 35%   | 33%  |
| I didn't eat fast food a year ago                             | 8%    | 2%      | 3%        | 2%    | 3%   |
| I don't eat fast food now                                     | 8%    | 2%      | 3%        | 2%    | 2%   |

# High earners eat fast food more often than you might expect

- Consumers earning \$100K+ are more likely to be heavy users, with 25% eating fast food 8+ times/month.
- Meanwhile, 40% of lower-income consumers say they're cutting back on fast food — more than any other income group. This suggests economic pressure is reducing QSR frequency for some while higher-income consumers lean in.

| How often do you eat fast food in a typical month? |       |            |                   |                     |             |                   |
|----------------------------------------------------|-------|------------|-------------------|---------------------|-------------|-------------------|
|                                                    | Total | < \$50,000 | \$50,000-\$99,999 | \$100,000-\$149,000 | > \$150,000 | Prefer not to say |
| < once per month                                   | 20%   | 26%        | 15%               | 12%                 | 16%         | 16%               |
| 1-3 times per month                                | 39%   | 42%        | 41%               | 32%                 | 30%         | 30%               |
| 4-7 times per month                                | 26%   | 21%        | 28%               | 33%                 | 28%         | 28%               |
| 8-10 times per month                               | 8%    | 5%         | 8%                | 11%                 | 13%         | 13%               |
| >10 times per month                                | 8%    | 6%         | 7%                | 12%                 | 14%         | 14%               |

# Rising QSR visitation by high-income groups

- Nearly 1 in 3 consumers earning \$100K–\$149K and 28% earning \$150K+ say they're eating fast food more often than a year ago.
- By contrast, 40% of consumers earning less than \$50K say they're eating it less frequently.

| Compared to one year ago, how often are you eating fast food? |       |            |                   |                     |             |                   |
|---------------------------------------------------------------|-------|------------|-------------------|---------------------|-------------|-------------------|
|                                                               | Total | < \$50,000 | \$50,000-\$99,999 | \$100,000-\$149,000 | > \$150,000 | Prefer not to say |
| More often                                                    | 20%   | 18%        | 18%               | 29%                 | 28%         | 14%               |
| About the same                                                | 41%   | 37%        | 46%               | 40%                 | 45%         | 34%               |
| Less often                                                    | 35%   | 40%        | 34%               | 28%                 | 24%         | 32%               |
| I didn't eat fast food a year ago                             | 2%    | 2%         | 1%                | 2%                  | 2%          | 8%                |
| I don't eat fast food now                                     | 2%    | 3%         | 1%                | 1%                  | 1%          | 11%               |

# McDonald's dominates the QSR landscape

- Two-thirds of consumers (65%) say they eat at McDonald's at least once a month, and a full third (33%) visit weekly or more — making it the clear fan favorite.
- While Taco Bell trails in weekly visits, it still pulls in 51% of consumers monthly, showing strong appeal as a less frequent but dependable option.

| How often do you purchase from the following fast food chains? |       |                              |                           |                    |                       |                |                         |                                    |
|----------------------------------------------------------------|-------|------------------------------|---------------------------|--------------------|-----------------------|----------------|-------------------------|------------------------------------|
| Brand                                                          | Never | Rarely (1x every few months) | Occasionally (1-3x/month) | Regularly (weekly) | Frequently (2+x/week) | Not in my area | Fan Favorites (weekly+) | Regular customers (occasionally +) |
| McDonald's                                                     | 11%   | 22%                          | 32%                       | 20%                | 13%                   | 1%             | 33%                     | 65%                                |
| Burger King                                                    | 19%   | 33%                          | 26%                       | 13%                | 7%                    | 2%             | 20%                     | 46%                                |
| Popeyes                                                        | 29%   | 30%                          | 22%                       | 9%                 | 5%                    | 5%             | 14%                     | 36%                                |
| Wendy's                                                        | 16%   | 35%                          | 29%                       | 12%                | 6%                    | 2%             | 18%                     | 47%                                |
| Chick-fil-A                                                    | 22%   | 27%                          | 26%                       | 13%                | 7%                    | 5%             | 20%                     | 46%                                |
| Taco Bell                                                      | 19%   | 29%                          | 30%                       | 14%                | 7%                    | 1%             | 21%                     | 51%                                |
| KFC                                                            | 27%   | 37%                          | 20%                       | 9%                 | 5%                    | 3%             | 14%                     | 33%                                |
| Arby's                                                         | 35%   | 31%                          | 17%                       | 7%                 | 5%                    | 5%             | 12%                     | 28%                                |
| Jack in the Box                                                | 45%   | 18%                          | 13%                       | 7%                 | 4%                    | 14%            | 11%                     | 24%                                |
| Sonic                                                          | 34%   | 28%                          | 19%                       | 8%                 | 5%                    | 7%             | 13%                     | 32%                                |



# Fan favorites shift slightly by region

- McDonald's is the top weekly choice in every region, with Chick-fil-A strong in the South and West, and Taco Bell climbing higher in the Northeast and Midwest.
- Chick-fil-A ranks second in weekly visits in the South, but drops to fourth or fifth in other regions — reflecting both regional access and brand affinity.

| <i>How often do you purchase from the following fast food chains?</i> |                   |                   |                   |                   |
|-----------------------------------------------------------------------|-------------------|-------------------|-------------------|-------------------|
|                                                                       | South             | Northeast         | Midwest           | West              |
| 1                                                                     | McDonald's - 34%  | McDonald's - 31%  | McDonald's - 33%  | McDonald's - 33%  |
| 2                                                                     | Chick-fil-A - 23% | Burger King - 22% | Taco Bell - 20%   | Taco Bell - 22%   |
| 3                                                                     | Taco Bell - 22%   | Wendy's - 20%     | Wendy's - 14%     | Chick-fil-A - 21% |
| 4                                                                     | Burger King - 20% | Taco Bell - 18%   | Chick-fil-A - 14% | Burger King - 22% |
| 5                                                                     | Wendy's - 19%     | Chick-fil-A - 17% | Burger King - 14% | Wendy's - 19%     |

# Monthly regulars follow similar patterns – Taco Bell gains ground

- McDonald's still leads by a wide margin for monthly visits, but Taco Bell ranks #2 in every region except the Northeast, where Burger King takes the second spot.
- Chick-fil-A is a top-three regular in three regions, but falls to fifth in the Northeast—suggesting potential for growth where it has less presence.

| <i>How often do you purchase from the following fast food chains?</i> |                   |                   |                   |                   |
|-----------------------------------------------------------------------|-------------------|-------------------|-------------------|-------------------|
|                                                                       | South             | Northeast         | Midwest           | West              |
| <b>1</b>                                                              | McDonald's - 67%  | McDonald's - 59%  | McDonald's - 67%  | McDonald's - 65%  |
| <b>2</b>                                                              | Taco Bell - 54%   | Burger King - 50% | Taco Bell - 51%   | Taco Bell - 56%   |
| <b>3</b>                                                              | Chick-fil-A - 53% | Wendy's - 48%     | Wendy's - 45%     | Wendy's - 45%     |
| <b>4</b>                                                              | Wendy's - 49%     | Chick-fil-A - 40% | Burger King - 44% | Chick-fil-A - 44% |
| <b>5</b>                                                              | Burger King - 47% | Taco Bell - 39%   | Chick-fil-A - 36% | Burger King - 43% |

# Taste rules, but priorities shift for high-frequency eaters

- Taste (71%) and price (67%) are the top drivers overall — but among those who eat fast food more than 10 times a month, price jumps to 77%, matching taste in importance.
- Convenience, location and speed rise in importance as visit frequency increases, while nutrition and experience matter more to infrequent visitors.

| Which are the most important factors when choosing a fast food meal?<br>Please select up to 3. |       |                  |                     |                     |                      |                     |
|------------------------------------------------------------------------------------------------|-------|------------------|---------------------|---------------------|----------------------|---------------------|
|                                                                                                | Total | < once per month | 1-3 times per month | 4-7 times per month | 8-10 times per month | >10 times per month |
| <b>Taste</b>                                                                                   | 71%   | 65%              | 69%                 | 67%                 | 66%                  | 66%                 |
| <b>Price</b>                                                                                   | 67%   | 67%              | 71%                 | 71%                 | 77%                  | 77%                 |
| <b>Convenience</b>                                                                             | 43%   | 22%              | 23%                 | 24%                 | 26%                  | 30%                 |
| <b>Location</b>                                                                                | 39%   | 39%              | 41%                 | 47%                 | 43%                  | 49%                 |
| <b>Speed</b>                                                                                   | 27%   | 25%              | 24%                 | 29%                 | 36%                  | 30%                 |
| <b>Health / nutrition</b>                                                                      | 26%   | 36%              | 39%                 | 42%                 | 41%                  | 40%                 |
| <b>Experience</b>                                                                              | 24%   | 32%              | 24%                 | 24%                 | 29%                  | 27%                 |
| <b>Loyalty</b>                                                                                 | 15%   | 16%              | 14%                 | 14%                 | 21%                  | 21%                 |
| <b>Tradition</b>                                                                               | 9%    | 8%               | 9%                  | 8%                  | 12%                  | 10%                 |

# Younger consumers are powering app-based fast food delivery

- Nearly one in three Gen Z and Millennial consumers (ages 18–35) order fast food via delivery apps 1–3 times a month or more.
- In contrast, more than two-thirds (69%) of adults 56–75 never use delivery apps for fast food, highlighting a clear generational divide.

| How often do you order fast food through a delivery app<br>(e.g., Doordash, Uber Eats, Grubhub)? |       |       |       |       |       |       |
|--------------------------------------------------------------------------------------------------|-------|-------|-------|-------|-------|-------|
|                                                                                                  | Total | 18–25 | 26–35 | 36–45 | 46–55 | 56–75 |
| Never                                                                                            | 29%   | 18%   | 18%   | 26%   | 37%   | 69%   |
| Rarely (once every few months)                                                                   | 26%   | 30%   | 27%   | 24%   | 28%   | 16%   |
| Occasionally (1–3x/month)                                                                        | 26%   | 32%   | 32%   | 27%   | 20%   | 12%   |
| Regularly (weekly)                                                                               | 13%   | 15%   | 15%   | 16%   | 13%   | 3%    |
| Frequently (2+x/week)                                                                            | 5%    | 4%    | 8%    | 8%    | 3%    | 1%    |

# Fast food is more about indulgence than necessity

- Just 18% of consumers say fast food is a practical solution to a busy life, while more see it as a treat (23%) or guilty pleasure (20%).
- Only 14% say it's a budget-friendly option — suggesting that value perception may not be top-of-mind, despite inflationary pressures.

| Today, fast food feels most like... |     |
|-------------------------------------|-----|
| A treat or reward                   | 23% |
| A guilty pleasure                   | 20% |
| A practical solution to a busy life | 18% |
| A budget-friendly option            | 14% |
| Something I'm cutting back on       | 13% |
| A habit                             | 9%  |
| None of these                       | 4%  |

# Spending & premiumization



# Consumers define fast food value between \$5 and \$8

- Nearly half of consumers (48%) say \$5–\$8 is the sweet spot for fast food pricing — making it the clear standard for perceived value.
- Heavy users are more flexible: Those eating fast food more than 10x/month are most likely to say \$8–\$10 (31%) or even over \$10 (13%) is good value.

| <i>What price point feels like “good value” for a fast food meal for yourself?</i> |       |                  |                     |                     |                      |                     |
|------------------------------------------------------------------------------------|-------|------------------|---------------------|---------------------|----------------------|---------------------|
|                                                                                    | Total | < once per month | 1-3 times per month | 4-7 times per month | 8-10 times per month | >10 times per month |
| Under \$5                                                                          | 21%   | 33%              | 20%                 | 17%                 | 15%                  | 20%                 |
| \$5 - \$8                                                                          | 48%   | 40%              | 52%                 | 53%                 | 47%                  | 36%                 |
| \$8 - \$10                                                                         | 25%   | 22%              | 24%                 | 26%                 | 32%                  | 31%                 |
| More than \$10                                                                     | 6%    | 5%               | 5%                  | 5%                  | 7%                   | 13%                 |



# Chick-fil-A leads in brand credibility for premium offerings

- Over half (53%) believe Chick-fil-A can successfully offer premium items, the highest of any brand tested.
- McDonald's (36%) and Wendy's (33%) also rank high — suggesting trust and consistency help brands stretch into upscale territory.

| <i>Which fast food brands do you believe can successfully offer premium or upscale menu items?</i> |     |
|----------------------------------------------------------------------------------------------------|-----|
| Chick-fil-A                                                                                        | 53% |
| McDonald's                                                                                         | 36% |
| Wendy's                                                                                            | 33% |
| Burger King                                                                                        | 30% |
| Popeyes                                                                                            | 28% |
| Taco Bell                                                                                          | 27% |
| KFC                                                                                                | 27% |
| Shake Shack                                                                                        | 24% |
| None of these                                                                                      | 12% |

# Premium fast food sparks interest — but trust varies by income

- Higher-income consumers show stronger interest, with 43% of those earning \$150K+ excited to try premium items, compared to just 25% under \$50K.
- Still, one in three (35%) remain skeptical, and 23% say premium items feel overpriced or gimmicky — highlighting the need for brands to justify value.

| <i>When fast food chains introduce premium menu items (e.g., wagyu burgers, truffle fries, brioche buns), how do you typically feel?</i> |       |            |                   |                     |             |                   |
|------------------------------------------------------------------------------------------------------------------------------------------|-------|------------|-------------------|---------------------|-------------|-------------------|
|                                                                                                                                          | Total | < \$50,000 | \$50,000-\$99,999 | \$100,000-\$149,000 | > \$150,000 | Prefer not to say |
| <b>I'm excited to try them</b>                                                                                                           | 30%   | 25%        | 30%               | 41%                 | 43%         | 21%               |
| <b>I'm curious, but skeptical</b>                                                                                                        | 35%   | 36%        | 36%               | 32%                 | 32%         | 24%               |
| <b>I think they're overpriced or gimmicky</b>                                                                                            | 23%   | 26%        | 22%               | 19%                 | 18%         | 24%               |
| <b>I don't pay attention to new items</b>                                                                                                | 12%   | 13%        | 12%               | 7%                  | 7%          | 31%               |

# Parents are more open to fast food innovation

- 42% of parents say they're excited to try premium items, nearly double the rate of non-parents (22%).
- By contrast, non-parents are more skeptical (37%) and more likely to ignore new launches — suggesting family-oriented positioning may help premium items land better.

| When fast food chains introduce premium menu items (e.g., wagyu burgers, truffle fries, brioche buns), how do you typically feel? |     |         |             |
|-----------------------------------------------------------------------------------------------------------------------------------|-----|---------|-------------|
|                                                                                                                                   | All | Parents | Non-parents |
| I'm excited to try them                                                                                                           | 30% | 42%     | 22%         |
| I'm curious, but skeptical                                                                                                        | 35% | 31%     | 37%         |
| I think they're overpriced or gimmicky                                                                                            | 23% | 18%     | 27%         |
| I don't pay attention to new items                                                                                                | 12% | 9%      | 14%         |

# Buy now, pay later is already common among heavy app users

- One in five consumers (21%) have used BNPL to pay for fast food or delivery — and usage jumps to 60% among the most frequent fast food consumers.
- An additional 26% would consider using BNPL, suggesting the option is quickly becoming normalized, especially for delivery.

| Have you ever used a “Buy Now, Pay Later” (BNPL) service (e.g., Klarna, Afterpay) to pay for a fast food or delivery order? |       |       |        |              |           |            |
|-----------------------------------------------------------------------------------------------------------------------------|-------|-------|--------|--------------|-----------|------------|
|                                                                                                                             | Total | Never | Rarely | Occasionally | Regularly | Frequently |
| Yes, I’ve done this before                                                                                                  | 21%   | 8%    | 17%    | 24%          | 39%       | 60%        |
| No, but I would consider it                                                                                                 | 26%   | 16%   | 29%    | 33%          | 28%       | 25%        |
| No, and I wouldn’t consider it                                                                                              | 39%   | 56%   | 42%    | 33%          | 23%       | 11%        |
| I’m not familiar with BNPL services                                                                                         | 14%   | 21%   | 13%    | 11%          | 10%       | 4%         |

# Consumers expect to spend more for experiences at sit-down restaurants

- 41% of consumers say \$15–\$20 feels like good value for a full-service restaurant meal, compared to just 6% who say that's true for fast food.
- Price expectations scale significantly by format — brands aiming for premium QSR pricing must clearly signal added value.

| <i>What feels like a good value for a sit-down meal for yourself at a full-service restaurant (e.g., Chili's, Outback, Applebee's), including tip?</i> |     |
|--------------------------------------------------------------------------------------------------------------------------------------------------------|-----|
| Under \$15                                                                                                                                             | 31% |
| \$15 - \$20                                                                                                                                            | 41% |
| \$20 - \$25                                                                                                                                            | 21% |
| More than \$25                                                                                                                                         | 7%  |

# Fast food wins on speed — but casual dining still competes on experience

- While nearly one-third (31%) prefer fast food if prices are similar, 30% would choose casual dining for the better atmosphere.
- High-frequency QSR users are more likely to opt for fast food (45%–42%), but lower-frequency users lean more toward casual or occasion-based dining.

| <i>If prices are similar, which would you choose?</i>     |       |                  |                     |                     |                      |                     |
|-----------------------------------------------------------|-------|------------------|---------------------|---------------------|----------------------|---------------------|
|                                                           | Total | < once per month | 1-3 times per month | 4-7 times per month | 8-10 times per month | >10 times per month |
| <b>Fast food meal (convenient &amp; quick)</b>            | 31%   | 26%              | 28%                 | 32%                 | 45%                  | 42%                 |
| <b>Casual dining (better experience &amp; atmosphere)</b> | 30%   | 28%              | 31%                 | 31%                 | 22%                  | 22%                 |
| <b>Depends on the occasion</b>                            | 35%   | 33%              | 39%                 | 35%                 | 33%                  | 28%                 |

# Chicken wrap rankings





# Methodology

## How rankings were created

3,000 Consumers evaluated 15 branded chicken wrap concepts from major QSR chains using Screen It, Zappi's early-stage product screening tool. Each product included visuals, nutrition facts and pricing. Respondents reviewed a random set of five wraps and ranked them 1–5 based on likelihood to purchase, appeal and other key attributes. Rankings reflect aggregated consumer preferences across all tested concepts.



# Top 10, according to consumers

McDonald's ranks as the most loved chicken wrap, with 47% in the top two — despite also having the most last-place votes.

Taco Bell and Popeyes follow, with 45% and 50% top-two votes respectively. Though Popeyes edges McDonald's in top-two votes, McDonald's Snack Wrap remains the overall favorite.

Crispy wraps outperform grilled options like Chick-Fil-A, Wendy's and McDonald's grilled wrap.



# 1. McDonald's Crispy Chicken Snack Wrap

Nostalgia is a big driver of what consumers like about the McDonald's Snack Wrap. Many noted having tried the snack wrap in the past and see it as a benefit.

Consumers didn't like the higher price point, with many consumers comparing it to historic \$1.99 pricing. The \$3.99 price point deterred consumers in some cases.

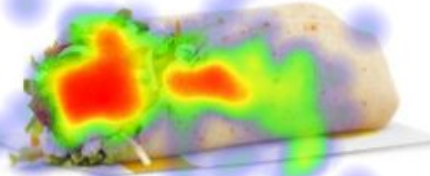


😊 Likes



McDonald's Ranch Chicken Snack Wrap with Crispy Chicken  
Made with 100% Canadian raised seasoned chicken topped with shredded lettuce, shredded cheese and ranch sauce wrapped in a soft white flour tortilla.

390 Cals  
\$3.99

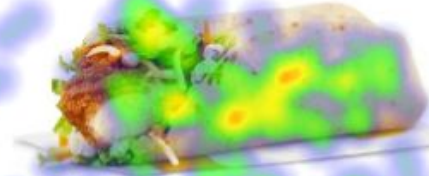


😞 Dislikes



McDonald's Ranch Chicken Snack Wrap with Crispy Chicken  
Made with 100% Canadian raised seasoned chicken topped with shredded lettuce, shredded cheese and ranch sauce wrapped in a soft white flour tortilla.

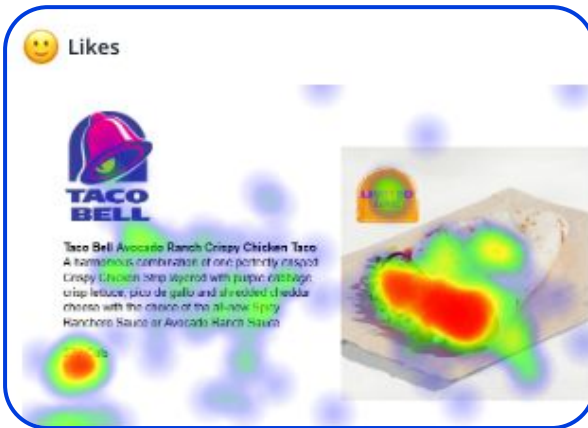
390 Cals  
\$3.99



## 2. Taco Bell Avocado Ranch Crispy Chicken Taco

Consumers loved the Taco Bell Chicken taco, with many citing its lower calories and price point. They were excited by the avocado ranch as a fun twist on a classic.

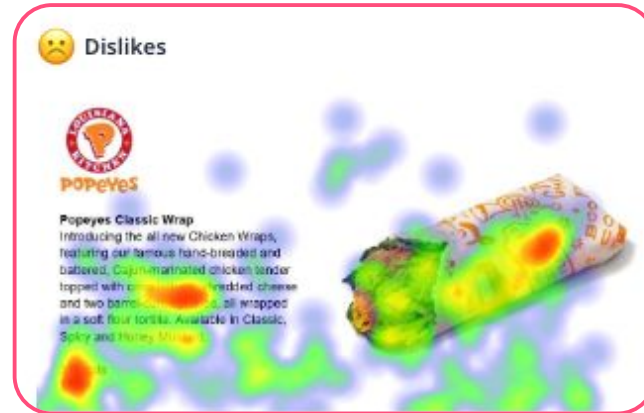
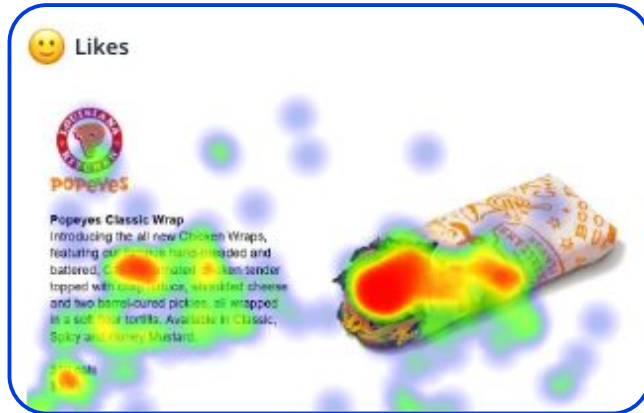
Consumers disliked the limited-time nature of the item, and were skeptical of ingredients like cabbage, pico de gallo, or ranch. Some also felt it lacked enough chicken to be satisfying.



### 3. Popeyes Classic Wrap

Consumers loved the cajun-marinated chicken in Popeyes wrap and remark that the chicken looked the most appetizing in this wrap relative to competitors.

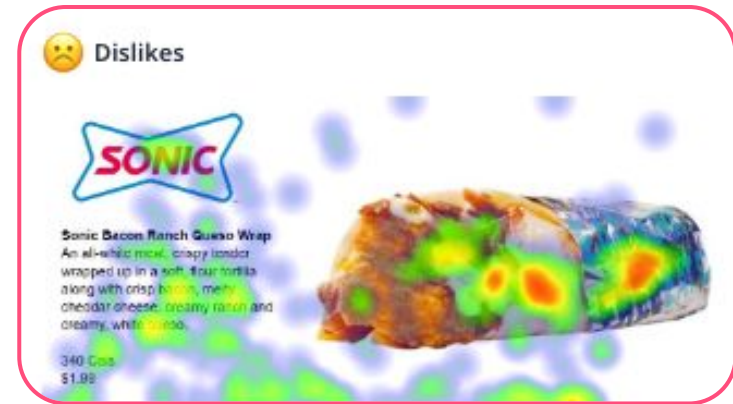
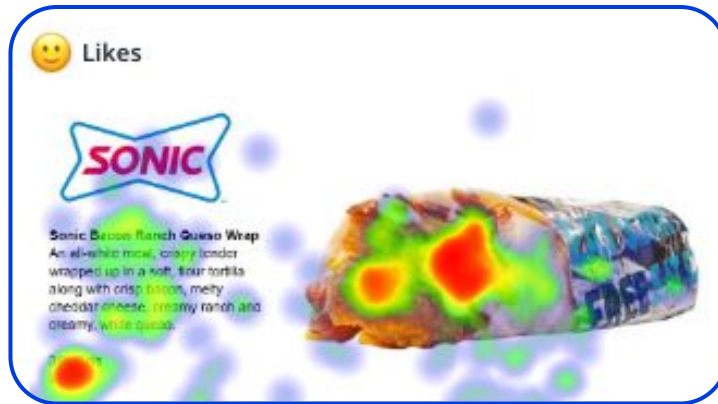
Consumers are skeptical about the pickles in the wrap, with many citing them as a dislike. Further, consumers were distracted by the colorful wrapping paper, with many saying it could make the wrap soggy.



## 4. Sonic Bacon Ranch Queso Wrap

Consumers love the \$1.99 price point for the Sonic Bacon Ranch Queso Wrap. Many cited it as filling and noted the bacon and white queso as distinctive and appealing additions.

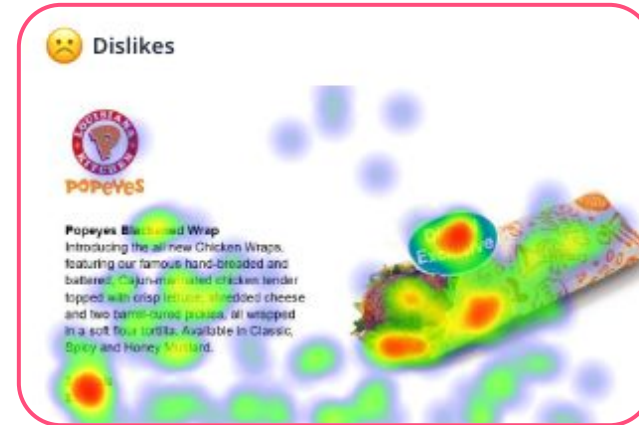
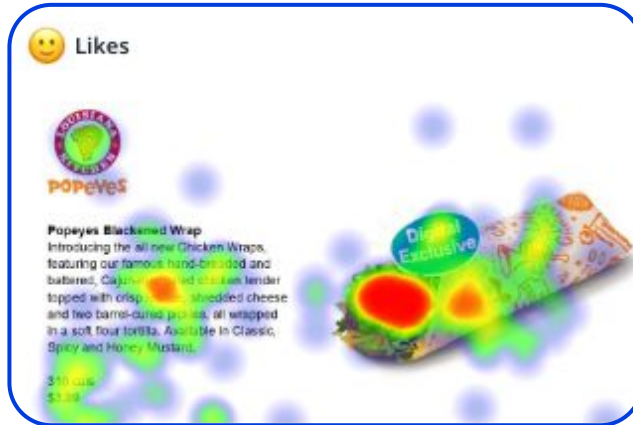
Consumers did not like the high calorie count on this product, while others were concerned about the portion size for the price.



# 5. Popeyes Blackened Wrap

Consumers love the Popeyes chicken, citing the quality and cajun spices as a differentiator. They are interested in the blackened spice and think the flavors balance out well.

Consumers didn't like that this product is a digital exclusive. They think that is a barrier to trying the product. Many disliked the price point relative to competitors.

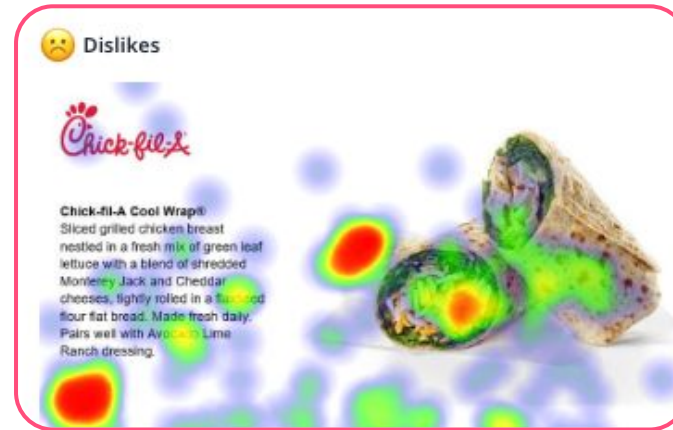
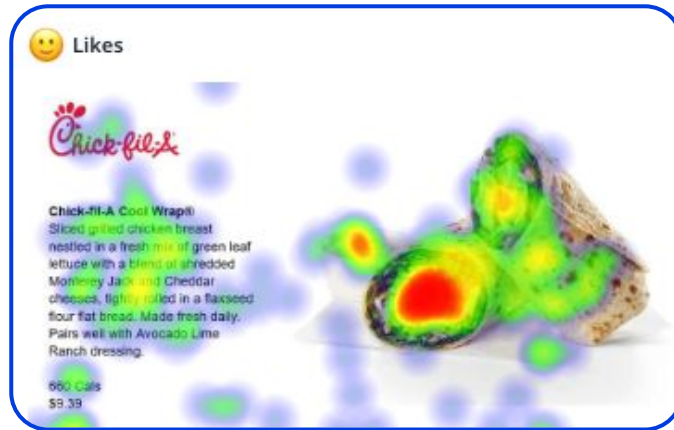




## 6. Chick-fil-A Cool Wrap

Consumers like the freshness of the Chick-fil-A Cool Wrap. Consumers appreciated the high-quality chicken from Chick-fil-A and think it provides a healthier alternative. The avocado ranch dressing also received many positive mentions.

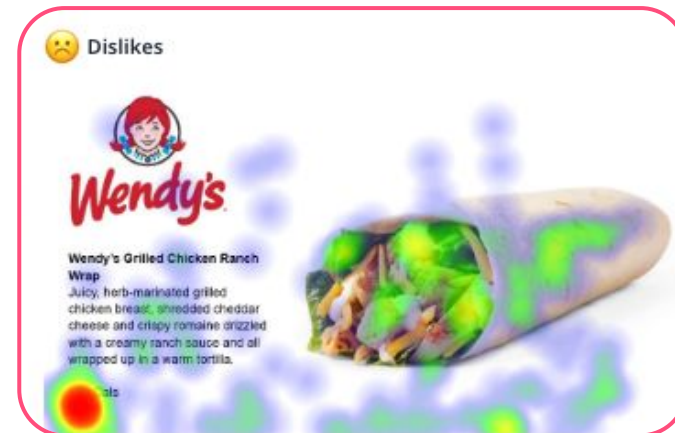
The price and calorie information of the Chick-fil-A Cool Wrap is higher than competitors. Despite consumers liking the restaurant's premium options, they were cautious about the higher price.



# 7. Wendy's Grilled Chicken Ranch Wrap

Consumers noted the herb-marinated chicken on Wendy's Grilled Chicken Ranch Wrap as one of its standout features. It was seen as fresh and affordable with a substantive offering yet a moderate calorie count.

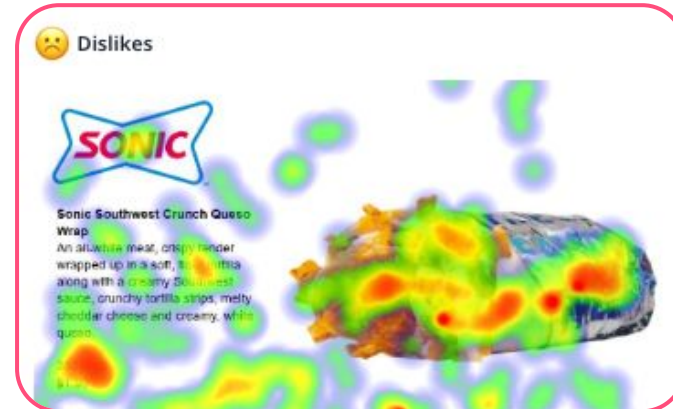
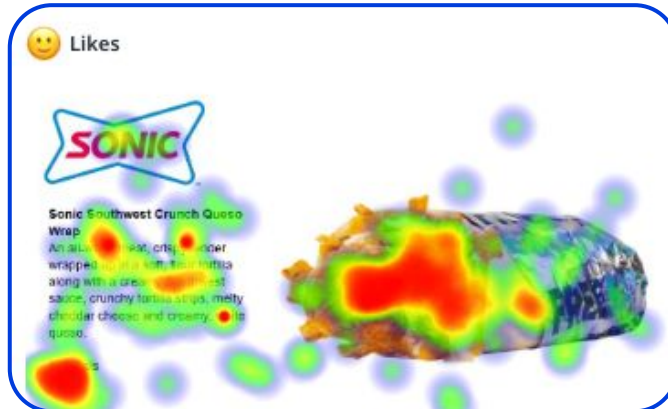
While the grilled chicken offering is distinct in this competitive set, consumers tended to prefer fried chicken in their wraps from a flavor standpoint. Consumers also disliked the higher price point for the Wendy's wrap.



# 8. Sonic Southwest Crunch Queso Wrap

Consumers loved the combination of cheddar cheese and queso on Sonic's Southwest Crunch Queso Wrap. The all-white meat chicken relayed a high-quality message to consumers while the crispy tortilla strips offered added crunch.

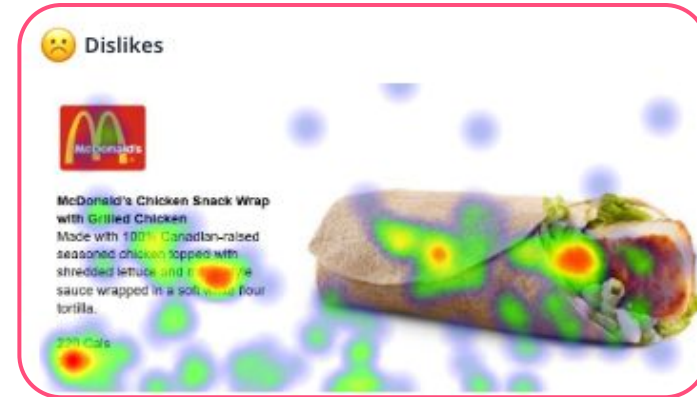
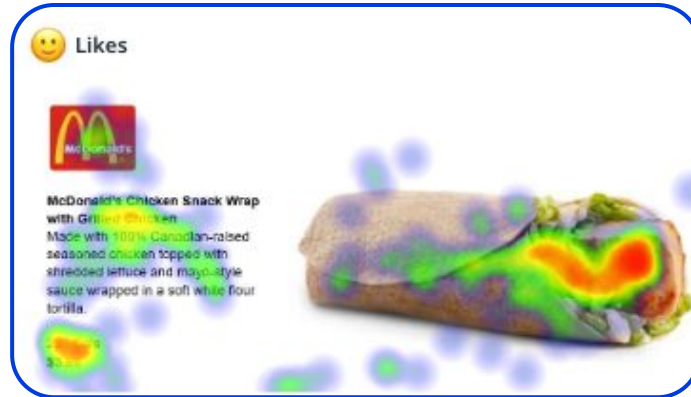
Despite consumers liking the luxurious elements of the wrap, consumers were cautious about the high calorie count. While consumers liked the price point, they were cautious about the portion size of the product relative to the high calorie count.



# 9. McDonald's Grilled Chicken Snack Wrap

Consumers trust the quality of McDonald's chicken and like the option of grilled or crispy chicken Snack Wraps. They appreciated the lower calorie offering from McDonald's.

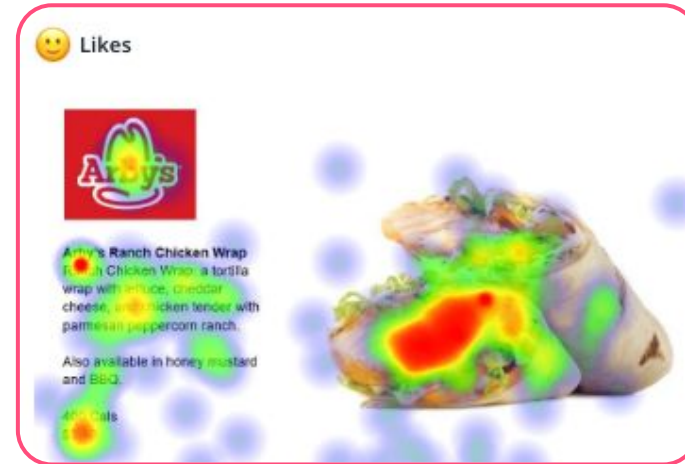
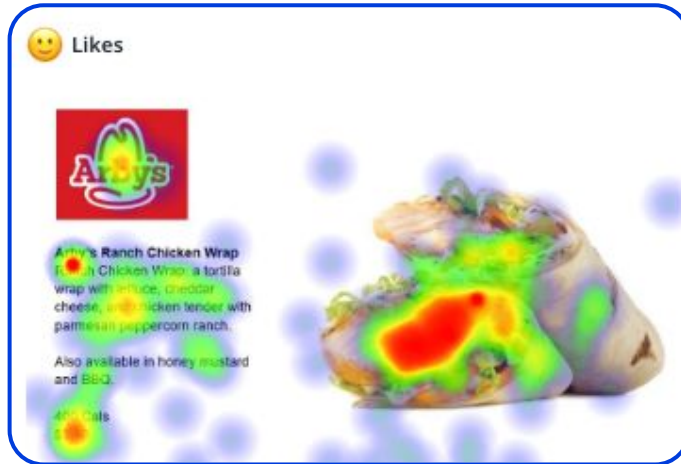
Consumers were confused by the “mayo-style sauce” with many indicating that a dislike of mayonnaise was a detractor to the Snack Wrap. Respondents also noted the higher price point than in the past as something they dislike.



# 10. Arby's Ranch Chicken Wrap

Consumers loved the combination of cheddar cheese and parmesan ranch dressing. Respondents also commented on the quality of the chicken, noting that it looks among the most appetizing.

Consumers were skeptical of the price point and calories in the Arby's Ranch Chicken Wrap.



# The loyalty index

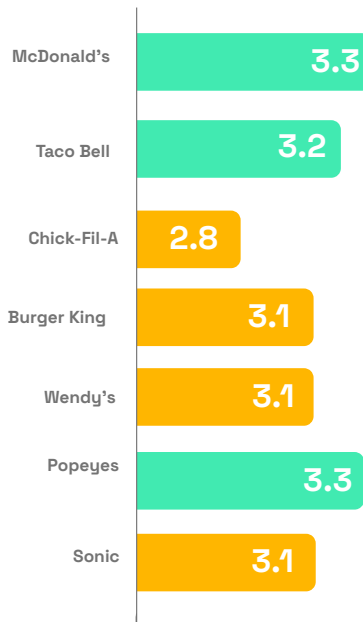
Loyalty plays an influential role in purchase likelihood.

Consumers who report visiting QSR brands at least once per week found products from that brand **6% more appealing on average**.

This is a testament to building strong customer loyalty.

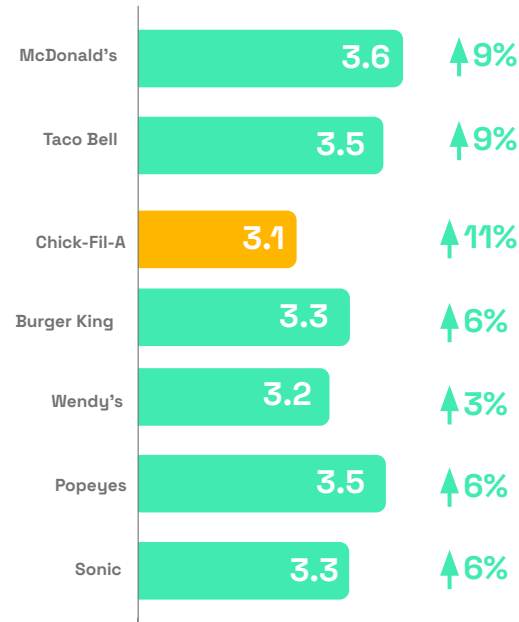
## All consumers

Based on overall ranking



## Fan favorites

Behavior change based on consumers who report visiting restaurant once per week or more.



# Favorites by age group



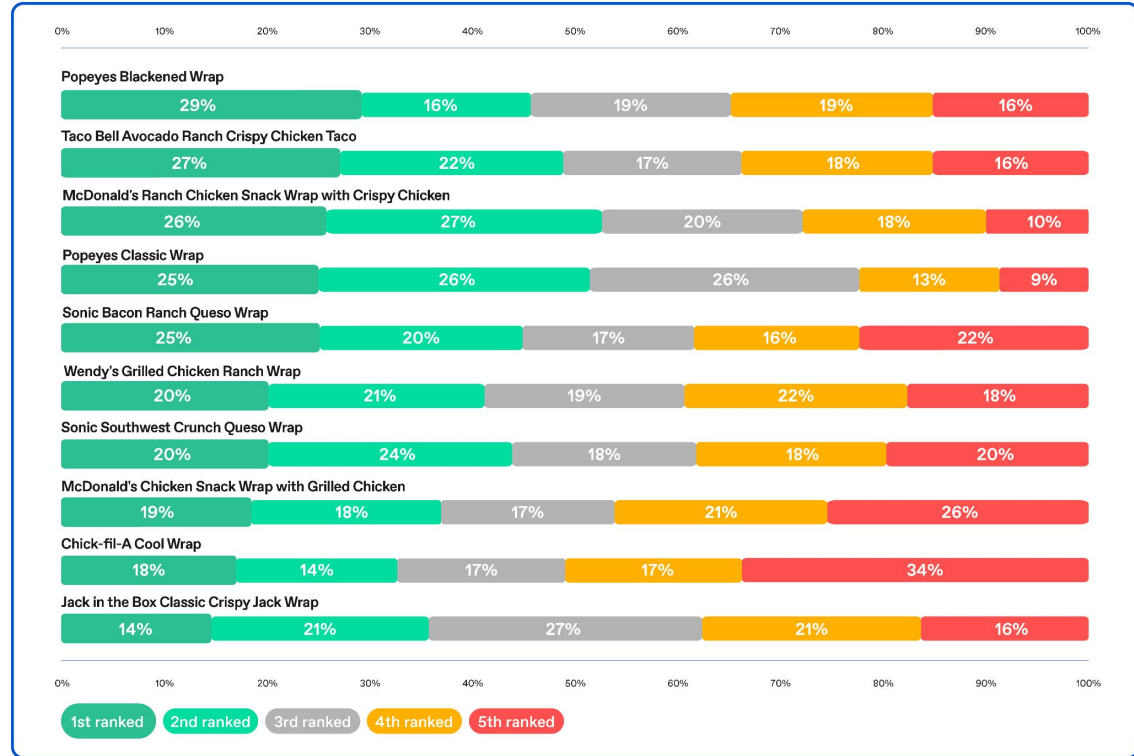


# Top 10, 18-25 age group

Popeyes Blackened Wrap led the pack with 29% of younger consumers ranking it #1.

**Novelty** in the form of flavors and spice-forward profiles resonated with this age group — Taco Bell's Avocado Ranch Crispy Chicken Taco claimed the #2 spot, reflecting a clear appetite for bold, unique options.

According to one consumer:  
**“This chicken looks so fantastic.  
 It looks so crispy and well seasoned.”**





# Top 10, 26-45 age group

**Nostalgia** fueled McDonald's Crispy Chicken Snack Wrap to the top, with 30% of consumers in this group choosing it as their favorite.

Many referenced a sense of familiarity and consistent taste as key reasons for their vote.

According to one consumer:  
**"I like the snack wrap since it came out years ago and the taste of it never changed"**



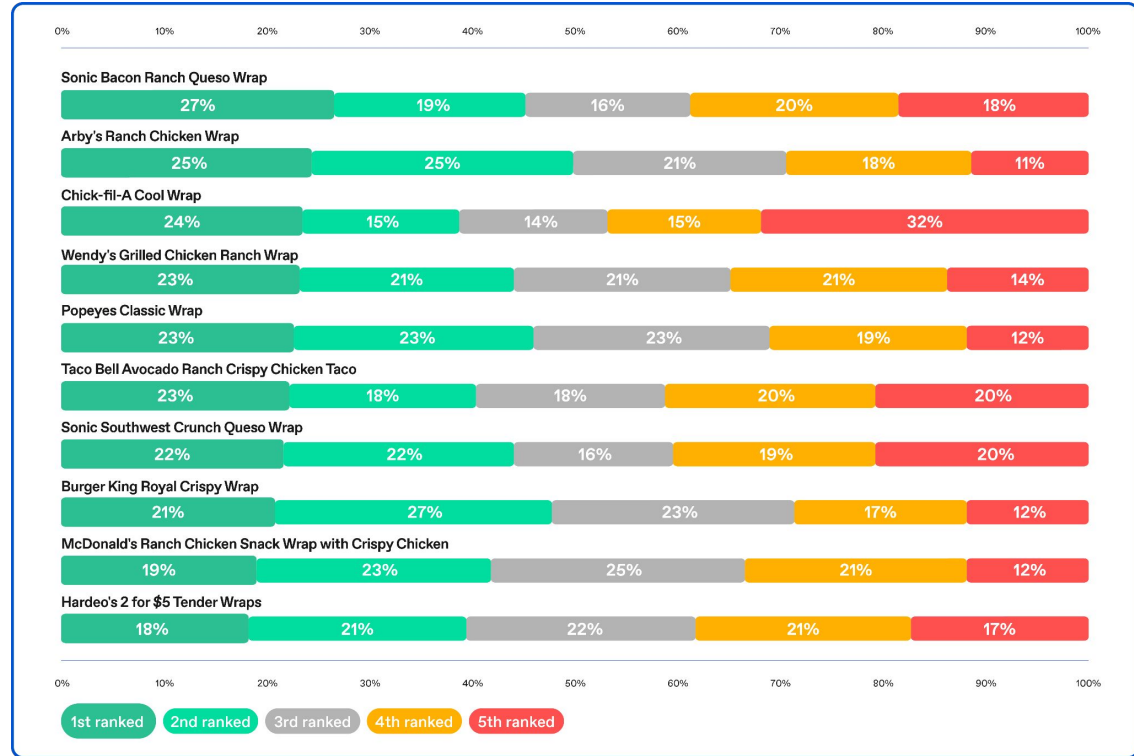
1320 consumers

# Top 10: 46+ age group

For consumers aged 46 and older, **value** was the most important factor in wrap selection.

Sonic's Bacon Ranch Queso Wrap earned the top spot with 27% ranking it #1 — driven in part by its low price point without sacrificing flavor or quality.

According to one consumer:  
**"The price is perfect  
for this economy"**



960 consumers

# Regional Favorites



# Top 10, Midwest

Sonic's Bacon Ranch Queso Wrap leads in the Midwest, with 27% ranking it #1.

Hardee's 2 for \$5 Tender Wraps made the top five, pointing to the importance of value and availability.

Despite high McDonald's visitation (67%), only the Crispy Snack Wrap placed in the top three — the Grilled version missed the top 10 entirely.

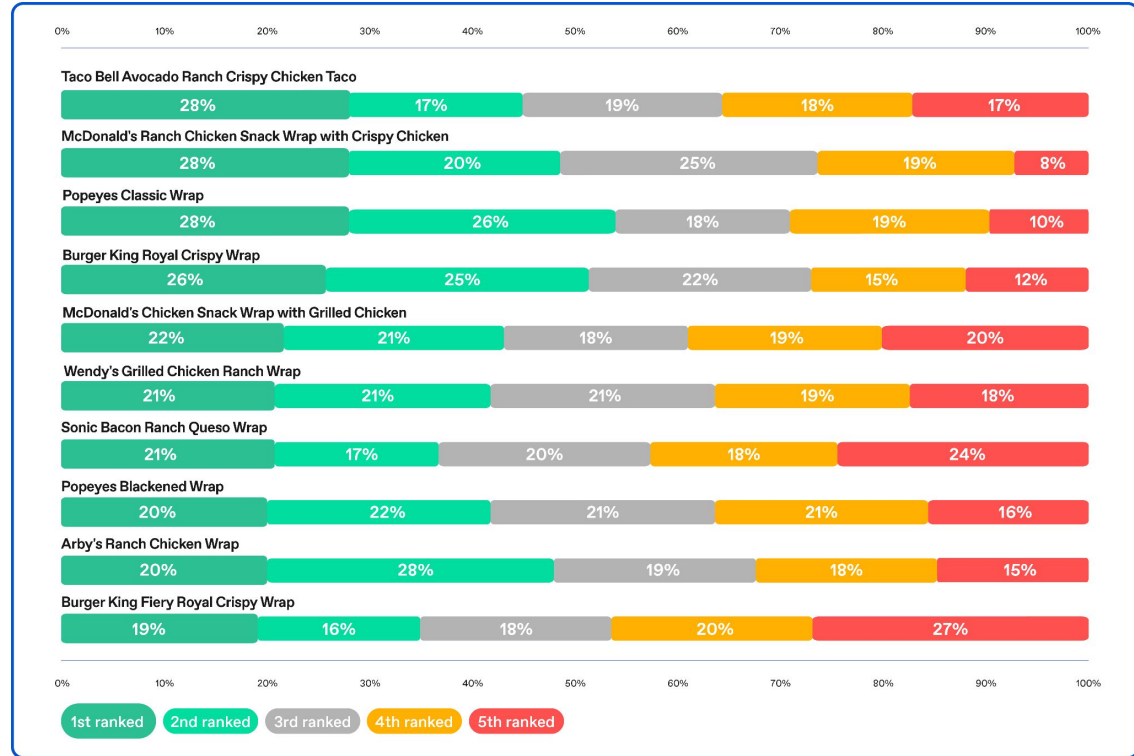


# Top 10, Northeast

Taco Bell's Avocado Ranch Crispy Chicken Taco takes the lead in the Northeast, with 28% ranking it #1.

Burger King's Royal Crispy Wrap landed in the top five — supported by strong brand presence, with 50% of regional consumers visiting monthly.

Chick-fil-A fell out of the top 10, likely due to limited availability in the area.



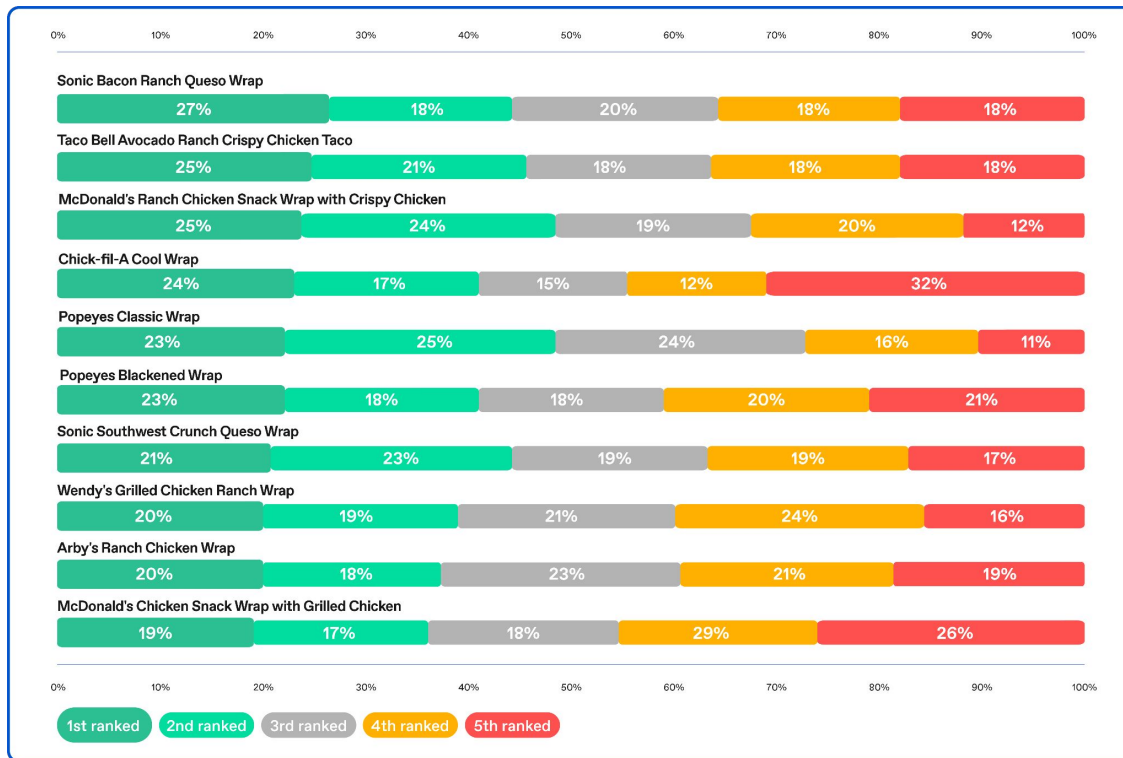
596 consumers

# Top 10, South

Sonic's Bacon Ranch Queso Wrap leads in the South, with 27% ranking it #1.

Chick-fil-A cracks the top five, supported by high brand loyalty: Nearly one in four consumers in the region visit weekly or more.

McDonald's Crispy Chicken Snack Wrap takes the #3 spot, bolstered by its widespread familiarity and legacy appeal.

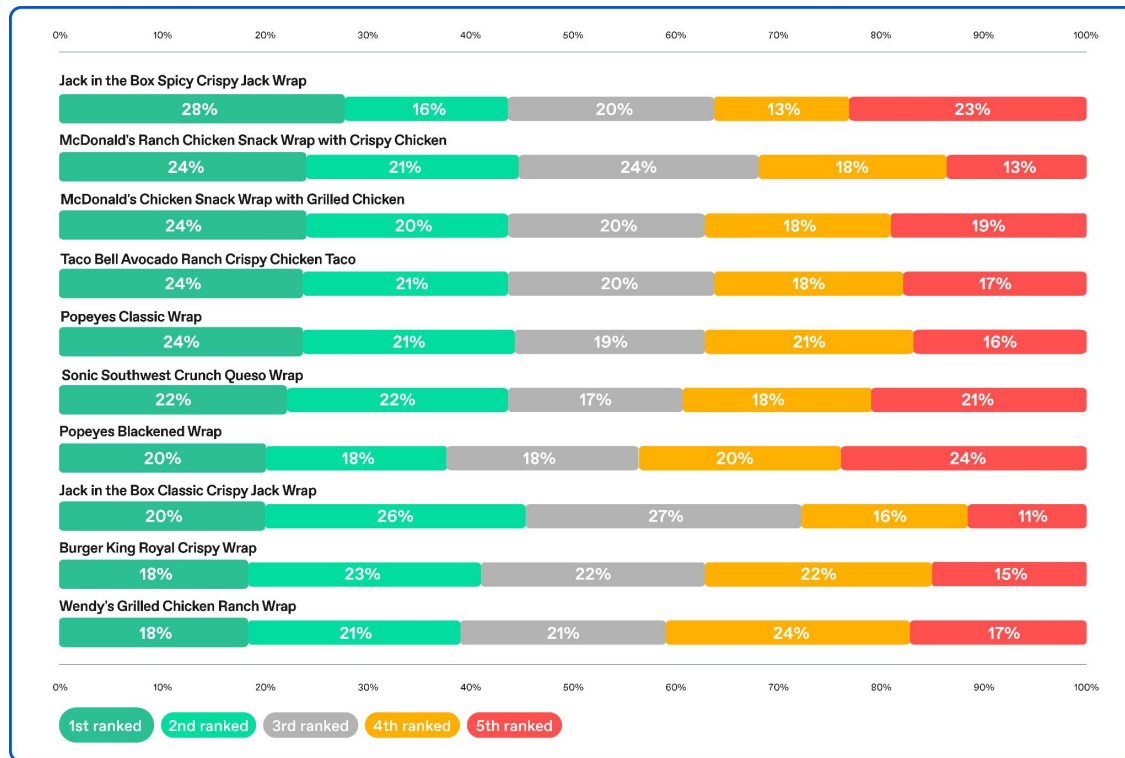


1335 consumers

# Top 10, West

Jack in the Box's Spicy Crispy Jack Wrap claims the #1 spot, with 28% ranking it as their top choice — despite the chain not landing in the region's top five most-visited fast food restaurants.

McDonald's Grilled Chicken Snack Wrap lands at #3 — aligning with the West's stronger focus on health and nutrition, with 32% citing it as a top decision factor (the highest across regions).



526 consumers

[illegible]



# Key attributes I



**Best Value**



Bacon Ranch  
Queso Wrap



**Best Tasting**

**POPEYES**

Classic  
Wrap



**Most Filling**



Southwest Crunch  
Queso Wrap

# Key attributes II



**Most Trusted  
Brand**



**Avocado Ranch  
Crispy**



**Highest Quality  
Ingredients**



**Cool Wrap**



**Healthiest**

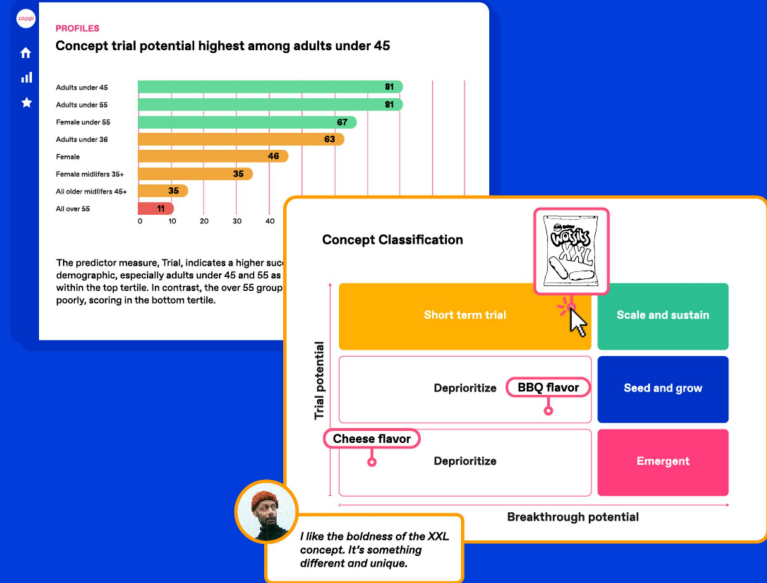


**Cool Wrap**

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