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Brand Report Card: Zaxby's

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Executive Summary

The research in this report consists of one leading competitor and one challenger in the market of U.S. fast-food restaurants whose primary product is chicken. The objective is to draw comparisons between the leader in this market, Chick-fil-A, and the fast-food franchise Zaxby's. Some areas where Zaxby's is lacking are reviewed, and recommendations are outlined for these fields. By looking at the leader in this space, Zaxby's can learn from Chick-fil-A's success and longevity.

The measures for grading consist of (1) having a social media presence, (2) food quality, (3) marketing innovation, (4) accessibility to potential patrons, (5) corporate social responsibility, and (6) product variety. The paper touches on the importance of being proactive to stay relevant and look to the future to predict where the industry will go next. The areas evaluated for improvement are social media awareness, product quality, brand marketing, and accessibility.

Introduction

Before 2020 and all the excitement it brought, there was a simple tweet containing just two words that ignited one of the most exciting food brand rivalries of modern day. The chicken fast-food chain Popeyes tweeted, "Y'all good?" to an unsuspecting Chick-fil-A, and all eyes were on what has been deemed the "Chicken Sandwich War."

On August 12th, 2019, Popeyes debuted its new chicken sandwich, and many people were wondering who really has the best chicken sandwich out of the major fast-food restaurants.

The marketing frenzy placed a magnifying glass on this industry's niche of chicken sandwiches. The Popeyes chicken sandwich sold out over and over, with many customers having difficulty being able to buy it. QSR magazine reports that chicken sandwich sales grew by 420% from 2019 to December 2020 (Klein, 2021). The "Chicken Sandwich War" invigorated the industry and still has experts wondering what is next.

Zaxby's Background

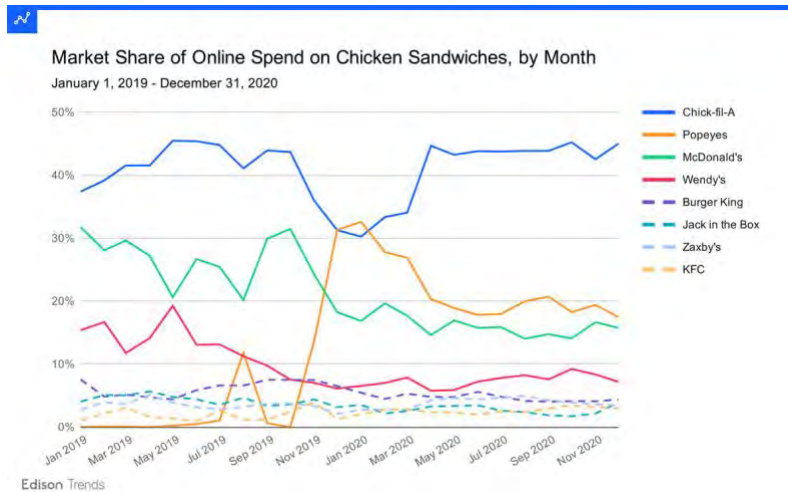


Source: QSR Magazine

Zaxby's opened its first restaurant in 1990 in the state of Georgia and the city of Statesboro. The idea for the restaurant came from founders Tony Townley and Zach McLeroy's disinterest in chicken tenders overall. McLeroy says that they disliked boring chicken tenders and felt confident that they could make them tastier (Credeur, 2005). The two gathered up \$16,000 dollars, and the journey began.

Zaxby's has been chosen as the challenger brand in this report because it resides on the lower end of the market share for the fast-food chicken industry. A second-tier brand is defined as brands that bring in 2 to 20 percent of its market leader (Haxthausen p.35, 2004). As of February 2021, Edison Trends reports that Zaxby's contains only 3% of the chicken sandwich market share (Edison Trends, 2021).

Data was gathered from over 100,000 purchases in the United States from Chick-fil-A, Popeyes, McDonald's, Wendy's, Burger King, Jack in the Box, KFC, and Zaxby's. With its rankings for market share in that order, from Chick-fil-A with the most to Zaxby's and KFC tying for the least. Zaxby's is a great contender because although its market share is small, it still managed to be recognized, and that shows potential.



Source: Edison Trends

Chick-fil-A's Background



Source: Chick-fil-A.com

Chick-fil-A also shares Georgia origins with Zaxby's, as it was created in an Atlanta suburb by founder S. Truett Cathy. Cathy opened a diner named Dwarf Grill in 1946, and this is where

Chick-fil-A's original chicken sandwich would be created. His patrons consisted of local factory workers and airline employees who would visit the diner on their lunch breaks. The creation of the original chicken sandwich stemmed from a desire to add chicken to his menu, but he needed to cook it fast (Wood, 2017). Seeking out a new method of cooking, Cathy recalled his mother, who applied pressure to her chicken in order to cook it faster. He then purchased a commercial pressure cooker to fry the lightly breaded chicken breast, and once he felt the sandwich was ready, it debuted as the first Chick-fil-A Chicken Sandwich in 1964.

Chick-fil-A is the leading competitor in the United States chicken sandwich market because it holds roughly 45% of the market share based on the Edison Trends data. Revenue Management Solutions (RMS) also reports that Chick-fil-A leads among chicken sandwich brands in terms of awareness (Klein, 2021). In the chart below, see also that it has the highest percentage for craving as well. When it comes to chicken sandwiches, Chick-fil-A ranks highest as the leader in this space.

Brands	Est. # of Units	Awareness*	Craving**
Chick-fil-a	2,533	75%	30%
McDonald's	13,660	72%	16%
Burger King	6,958	69%	8%
KFC	3,948	64%	10%
Wendy's	5,841	61%	11%
Popeyes	2,585	57%	13%
Church's Chicken	915	46%	2%
Jack in the box	2,236	29%	3%
Carl's Jr.	1,102	29%	2%
Hardee's	1,805	28%	1%
Checkers/Rally's	873	21%	1%
Bojangles	746	20%	1%
Zaxby's	908	19%	2%
Whataburger	842	12%	1%

* Which of the following brands, to your knowledge, currently offer hot chicken sandwiches?

** When you are craving a hot chicken sandwich, which quick-service restaurant is your go-to?

Source: Revenue Management Solutions

Brand Report Card

MBA Skool’s SWOT analysis puts Zaxby’s demographics at 18 to 45 years of age, with a middle to high-income range (MBA Skool Team, 2020). The website also reports that Chick-fil-A’s target market consists of middle and upper-middle-class families.

<h1>BRAND REPORT CARD</h1>		
GRADING SYSTEM:		
A - 100 - 90	C - 70 - 79	F - 64 and below
B - 80 - 89	D - 65 - 69	
CHICK-FIL-A	(92) A	
THE BRAND HAS ADEQUATE SOCIAL MEDIA AWARENESS	27/30	
THE BRAND UTILIZES HIGH QUALITY INGREDIENTS	20/20	
THE BRAND CREATES INNOVATIVE MARKETING	19/20	
THE BRAND IS ACCESSIBLE TO ITS TARGET MARKET	15/15	
THE BRAND SHOWS CORPORATE SOCIAL RESPONSIBILITY	7/10	
THE BRAND OFFERS PRODUCT VARIETY	4/5	
ZAXBY'S	(80) B	
THE BRAND HAS ADEQUATE SOCIAL MEDIA AWARENESS	24/30	
THE BRAND UTILIZES HIGH QUALITY INGREDIENTS	12/20	
THE BRAND CREATES INNOVATIVE MARKETING	17/20	
THE BRAND IS ACCESSIBLE TO ITS TARGET MARKET	13/15	
THE BRAND SHOWS CORPORATE SOCIAL RESPONSIBILITY	10/10	
THE BRAND OFFERS PRODUCT VARIETY	4/5	

Brand Measures

1 - The Brand Has Adequate Social Media Awareness

This measure is high on the grading scale because of the necessary role it plays in modern society. An estimated 3.81 billion people are on social media as of 2020 (Dean, 2021). That is roughly half of the planet's population. Social media gives brands a chance to get attention and create brand awareness (Marketing Insider Group, 2018). Creating awareness is not just for generating sales but also for clarifying and informing the public. It is important to control the brand's narrative, and conversations will be had on social media about the brand, whether it has a social media presence or not. 84% of people aged between 18 and 29 are on social media, with 81% of 30 to 49-year-olds utilizing it (PEW Research Center, 2021). The Zaxby's target market resides on social media.

So what makes an adequate social media account? Since success is subjective, the grading for this measure will depend upon Zaxby's social media growth. The easiest way to measure growth is through audience growth or the amount of followers gained in a certain period of time, (Siva, 2020). Facebook and YouTube are the top social media sites with the most active monthly users, (Chaffey, 2021), so those sites will be the deciding factors.

The Zaxby's Facebook page currently has 1,335,338 likes versus Chick-fil-A's 7,995,347 page likes. Chick-fil-A is a good bar to use to visualize what is possible for a fast-food chicken restaurant in terms of attainability on the platform. It has acquired its 7.9 million likes since joining Facebook in 2008. Zaxby's also joined Facebook that same year so Chick-fil-A actually did not have a head start over them. Next is Zaxby's YouTube channel, which was created in

June of 2010. Unfortunately, it only has 4.56 thousand subscribers. Chick-fil-A currently has 52.7 thousand subscribers, but there is room for improvement. Since joining YouTube in 2006, when it was still very new, the channel should have at least 100 thousand subscribers. Zaxby's entered the platform in 2010, so it is logical to expect more than 4 thousand subscribers in a decade.

2 - The Brand Utilizes High Quality Ingredients

Although Zaxby's operates in the fast-food casual dining sector, customers still expect some level of quality ingredients. The U.S. fast-food industry relies heavily on processed foods. Processed food just means that the food is no longer in its natural state, and this can be due to convenience or safety (Keys, 2013). It can be cost effective and save the restaurant money but at what cost?

To see where the challenger Zaxby's stands, here are the nutritional facts on its Signature Chicken Sandwich:

Updated: 3/10/2021		
Serving Size	1 sandwich	
Calories	780	
Calories From Fat	387	
	Amount Per Serving	% Daily Value*
Total Fat	43g	66%
Saturated Fat	7g	35%
Trans Fat	1g	
Cholesterol	95mg	32%
Sodium	2540mg	106%
Total Carbohydrates	53g	18%
Dietary Fiber	4g	16%
Sugars	8g	
Protein	45g	90%

Source: FastFoodNutrition.org

Although the Food & Drug Administration recommends a 2,000-calorie per day diet, that is dependent upon the individual. So the high calories of 780 are debatable, but the sodium level is

significant at 106% of the daily recommended intake. In comparison, Chick-fil-A's Original Chicken Sandwich has only 440 calories with 1400mg of sodium. There is also concern about the poultry being served because Zaxby's does not claim to use fresh chicken ingredients, unlike most fast-food chains (Cardoza, 2017). However, Chick-fil-A has made a public commitment to sell only chicken that is hormone free with no added fillers (Cardoza, 2017).

3 - The Brand Creates Innovative Marketing

While the quality of a product should be good, it doesn't matter if no one knows of its existence. In today's world, there are so many ways to market a product and so many companies that may saturate markets. The solution lies in creative marketing techniques that help a brand stand out. Innovation is a common misconception that leads many to believe that it must come from the product itself, but innovation can be applied to any aspect of the brand. This includes how it is priced, packaged, managed, marketed, etc. (Dib, 2018).

Zaxby's gained points in this category for running OTT ads during the beginning of the pandemic in 2020. Lunch orders and live sports were a big hit for Zaxby's, but the pandemic shut down indoor dining, and sports games were canceled. While other brands reduced ad spend, Zaxby's added about 40% to its advertising budget (Mahoney, 2020). It advertised through online gaming content and saw sales increase 36%.

Allen Dib, author of the "1-Page Marketing Plan" suggests that brands create a sense of theater around company products to create a viral buzz. Evaluating Zaxby's last campaign for its Signature Chicken Sandwich shows that it was trying to do just that, create a sense of theater.

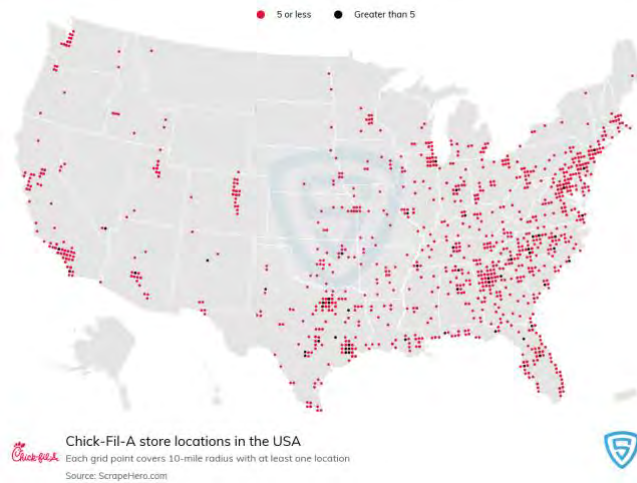
But Zaxby's lost some points in this brand measurement because it was late entering into the "Chicken Sandwich War". Over a year after the Popeyes chicken sandwich frenzy, Zaxby's tweeted "Y'all ready?" to Popeyes on Twitter, which mimicked the viral tweet to Chick-fil-A, "Y'all good?" This would have been brilliant if it was executed when the rivalry was at its peak in 2019. The accompanying commercial featured army soldiers preparing for battle, and it would have paired nicely during 2019 while the topic was still trending. Overall, the campaign felt too little too late. However, Chick-fil-A engaged in a social media back and forth with Popeyes during 2019 that entertained viewers and kept the initial momentum going for months.

4 - The Brand is Accessible to its Target Market

For selling products, there are certain criteria that need to be met in order to make the transaction. The 4 P's of marketing are general rules of thumb that can help brands sell products, which consist of the product, the price, the place, and the promotion (Twin, 2021). For this brand measure, the place element is what is being evaluated. The goal is to get the brand to those who will likely purchase it.

Zaxby's founders initially targeted college students and built restaurants near college campuses. As time went on, they discovered that Zaxby's appealed to blue and white-collar workers as well as families (Credeur, 2005). The restaurants have branched out of Georgia and currently have 919 locations in the U.S., mostly in the south (ScrapeHero, 2021). It seems that Zaxby's is oversaturating the southern market, and it is missing out on major metropolitan cities like New York, Chicago, and Los Angeles. Zaxby's ran ads during the NCAA Tournament of 2015, which created brand awareness, but many viewers tweeted that they do not have a Zaxby's location

near them. Zaxby's is missing from 39 of the U.S. states and territories (ScrapeHero, 2021). By comparison, Chick-fil-A has 2,687 stores in the country, and it covers most densely populated cities (see map below).



Source: ScrapeHero.com

5 - The Brand Shows Corporate Social Responsibility

It is recommended that all brands have some level of social responsibility, as it is a crucial part of a company's survival in today's economy (Leonard, 2019). While a brand can get by without exhibiting corporate social responsibility (CSR), as the brand grows larger, it will be under more scrutiny. CSR can come in multiple forms such as philanthropy, environmental conservation, employee diversity, and volunteer efforts (Leonard, 2019).

Luckily, Zaxby's has done very well in this category. Through the SJAC Food Groups website, people can rent out Zaxby's locations at discounted rates for things like raising funds for charities and school activities (SJAC Food Groups, n.d.). Much of its charitable work is focused on communities and being an asset to the community rather than only making profits. This is on brand for its southern beginnings and mimics southern hospitality.

Chick-fil-A does contribute to philanthropic efforts, but it has attracted some negative attention for donating millions of dollars to LGBTQ+ hate groups. Prior to 2012, Chick-fil-A regularly donated to anti-LGBTQ groups, and the CEO stated that same-sex marriage would bring divine judgment on the U.S. (Dunn, 2020). After receiving negative backlash and protesters demonstrating at the restaurants, Chick-fil-A vowed to cease donations, but the stain on its reputation lingered for some people. Many members of the LGBTQ+ community continue to boycott them.

6 - The Brand Offers Product Variety

There are some small fast-food restaurants that have managed to keep the food items limited, but in order to scale a brand, more options that appeal to a wider market would be ideal. In the food and beverage industry, there is a fast-growing new category which is meat substitutes or plant-based meats. This trend has been fueled by flexitarians; people who eat plant-based foods but do not eliminate meat completely (Adzic, 2021). This new category opens up new possibilities and may bring in new customers.

The Zaxby's menu offers chicken dishes in the form of sandwiches, tenders, salads, and chicken wings. What stands out on the menu is the chicken salad sandwich and some of the sides, which include fried mushrooms and fried pickles. These items aren't usually offered by competitor restaurants, such as Popeyes and KFC. Those items give Zaxby's some variety. Chick-fil-A has even less variety than Zaxby's, serving only chicken sandwiches, nuggets, and wraps. However, it does have breakfast options, and Zaxby's does not. Breakfast may be an option for them in the future. It already has the infrastructure for a chicken biscuit similar to Chick-fil-A.

While incorporating additional items like meat substitutes is not a requirement, this measure was included because Zaxby's competitors are beginning to use these products. Chick-fil-A is currently researching a plant-based option, while KFC has tested meat substitute nuggets, and Burger King has seen success with the Impossible Whopper. Zaxby's can get ahead of Chick-fil-A before it releases a plant-based option.

Recommendations for Areas of Improvement

A - Social Media Awareness

Zaxby's has a decent foothold with its 1.3 million Facebook followers, so it needs to take some notes from Chick-fil-A's social media activity. The Zaxby's Facebook page posts semi-regularly, with a post every few days and content that mainly consists of pictures of menu items. The difference between the Zaxby's page and Chick-fil-A is that Chick-fil-A highlights its employees as real people, not actors. Currently, it posts videos showing what some employees have gained from working for the company. When engaging in empathy-based marketing, it is essential to show the customer what they can achieve while using the brand rather than try to sell to them constantly (Brenner, 2021).

One of the most famous campaigns is by Nike with its "Just Do It" slogan. It does not mention products directly but advertises a feeling that creates an emotional connection. A suggestion for Zaxby's would be to produce videos because the bulk of its social media content involves photos of products, which demonstrates a lack of variety. Trends have shown that video marketing results in viewers retaining 95% of the intended message (Velos, 2021). Rolling out a campaign highlighting the love and fondness for Zaxby's food would be an excellent path for them to

explore. Recording short 30-second interviews with patrons as they eat at the restaurants and highlighting its fundraising efforts within the community should help to grow the Facebook and YouTube accounts.

The same methods should be applied to the Zaxby's YouTube channel in a longer video format. Videos between 7 to 15 minutes tend to do better on the platform (Vest, 2018). Also, consistency is essential for social media, and Zaxby's has only uploaded 29 videos to its channel so far. These videos are television commercial ads that were not developed for social media. The company can use some behind-the-scenes and documentary-style videos that humanize the brand, creating that empathetic connection.

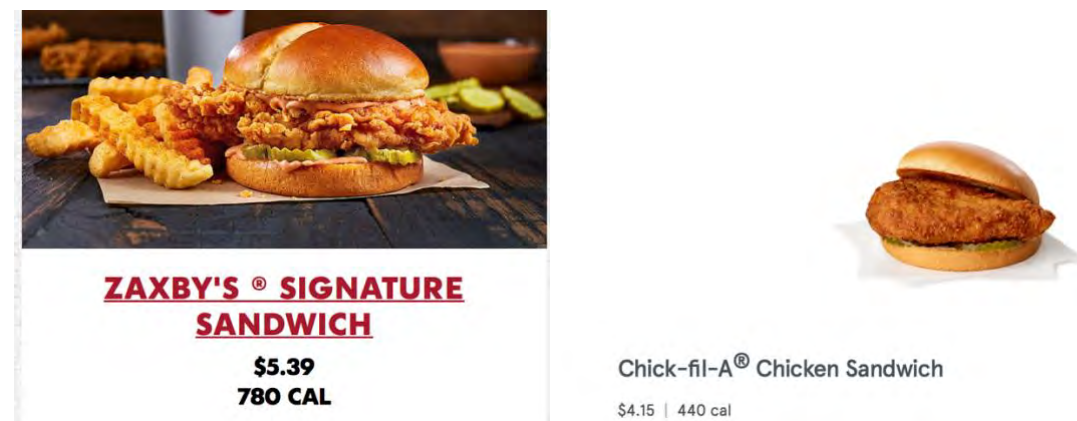
B - Product Quality

The average consumer is becoming more informed about their health, and diet is a top priority. Books and media constantly expose unhealthy foods, like the documentary "Super Size Me", which took direct aim at fast-food (Keys, 2013). The sequel, "Super Size Me 2", heavily criticized the fast-food chicken sandwich industry.

As mentioned in the Product Quality Ingredients section of this report, Zaxby's clocked in at almost 800 calories for its Signature Chicken Sandwich and 2,540mg of sodium, resulting in 106% of the recommended daily allowance. Moreover, possibly serving chicken that is not fresh. The answer is simple: use better quality ingredients. Based on prices from the DC Metropolitan area, a Zaxby's Signature Chicken Sandwich costs \$5.39, while Chick-fil-A's Original Chicken

Sandwich is only \$4.15. This means that it is possible to have better quality with healthier ingredients.

Of course, it is not selling at the same volume as Chick-fil-A, but Zaxby's should consider reducing the sodium levels and look into local farms that can supply fresh chicken at reasonable costs. The positive is that more health-conscious people will become new customers. There is also the fact that fresh food tastes better, and that can be a significant factor on why Chick-fil-A scored the highest rating for craving in the RMS Report.



Source: Zaxby's.com & Chickfila.com

C - Brand Marketing

Zaxby's has made some achievements with marketing in the past, but it needs to double down on the successful campaigns. In the 90's and early 2000's, Zaxby's had well-known celebrities in its ads. This secondary marketing technique is helpful, but it can also be expensive to hire celebrities. What has worked for Zaxby's recently is using OTT ads on gaming content. The brand is no stranger to sports affiliations from having sponsored 25 Division 1 college schools in 2013 (QSR Magazine, 2013). The company dubbed itself as the official chicken of college sports.

This is a sector that the competitor Chick-fil-A is not exploring. The mistake was trying to go after Popeyes and Chick-fil-A directly after the “Chicken Sandwich War” was over. The Paul Newman brand Newman’s Own donated 100% of its profits after taxes to charitable causes. This tactic was an excellent example of a challenger brand changing its positioning rather than the product (Haxthausen p.37, 2004). If Zaxby’s wants to produce one of the unhealthiest fast-food chicken sandwiches on the market, it can still change its positioning.

The company can introduce campaigns with its sponsored gamer SypherPK, also known as Ali Hassan. There should be content with Hassan all over the company’s social media networks. His 11 million followers on Twitch have the potential to increase the Zaxby’s social media presence. Forbes stated that gamers ages 18 to 25 watch esports 77% more than broadcast sports (Fast Casual, 2020). If Zaxby’s wants to be linked to sports, it should focus on that area and dominate the esports niche.

D - Accessibility

Zaxby’s has come a long way and is near the founder’s goal of opening 1,000 locations (Credeur, 2005). Currently, there are 919 stores, but those are predominately in the south. In the time of global connectivity, it is easier to familiarize yourself with brands digitally. Gone are the days when fast-food chains stay in the same city or state because it is so easy to reach a wider audience.

The data captured by Edison Trends shows that America loves chicken, so there is little doubt that major U.S. cities further north will not welcome Zaxby’s. What may be happening with

Zaxby's could stem from the franchisee process. Although Chick-fil-A has over 2,000 stores, it still has fewer locations than other top competitors. Based on sales revenue, Chick-fil-A was ranked the third-largest restaurant chain in America. By comparison, Taco Bell has almost three times the amount of locations as Chick-fil-A, and Taco Bell brought in slightly less than the 2019 revenue of Chick-fil-A (Taylor, 2020).

So there has to be something about the franchises. Yes, Chick-fil-A has an extensive franchisee application, with only 0.25 percent of applicants being chosen (Franchise Business Review, 2019). The applicants can only open one location, and they cannot be involved in any other business ventures while operating a Chick-fil-A location. The company also boasts a 96% retention rate for the past 50 years (Franchise Business Review, 2019). Zaxby's has one franchisee that operates 28 locations (SJAC Food Groups, n.d.). With so many locations, there is a higher possibility that service and product quality will suffer. Zaxby's can learn from Chick-fil-A's process and be more selective in assigning franchisees. In this scenario, it is not about quantity but quality.

Conclusion

Overall, Zaxby's managed a decent score in this brand report. It is uniquely positioned for growth and innovation in the fast-food space. While saturating the southern market may be a safe choice, Zaxby's may venture into the north someday. Hopefully, the company will not spread itself too thin, with each franchisee running dozens of stores. There is also the opportunity to do creative marketing in an emerging field like esports.

For the most part, Zaxby's has Chick-fil-A to look to as a blueprint for where it would like to go in the near and distant future. It is admirable what Chick-fil-A has achieved without swaying from its roots and not being open on Sundays. This report references these brands as competitors, but the reality is that consumers want more options, and there is enough success to go around for everyone. Chick-fil-A just so happens to have 45% of the pie.

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