

## Strong Demand For The Sandwich

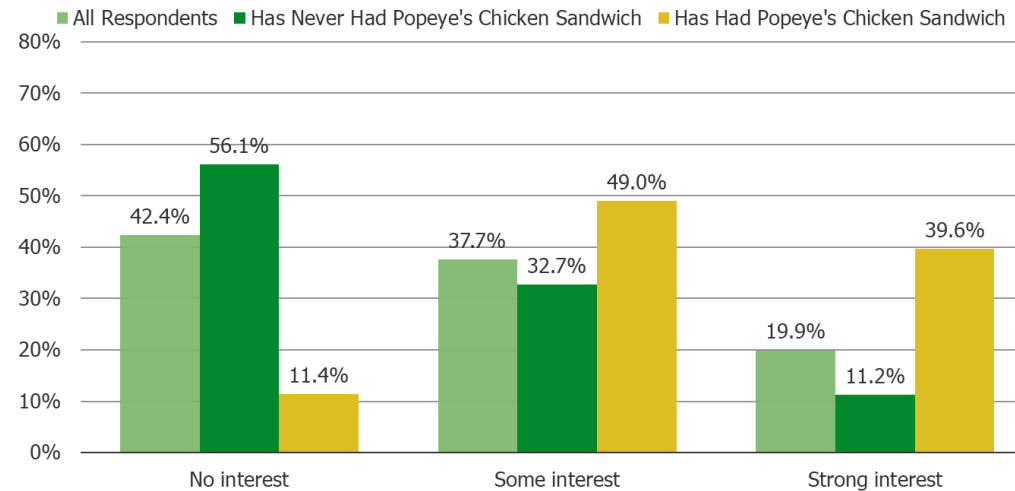
- *90% of those who have had the chicken sandwich have interest in getting it again after it is re-launched.*
- *Nearly 60% of consumers who have not had it are interested in getting it.*

## Competitive Dynamics – Pizza Risks

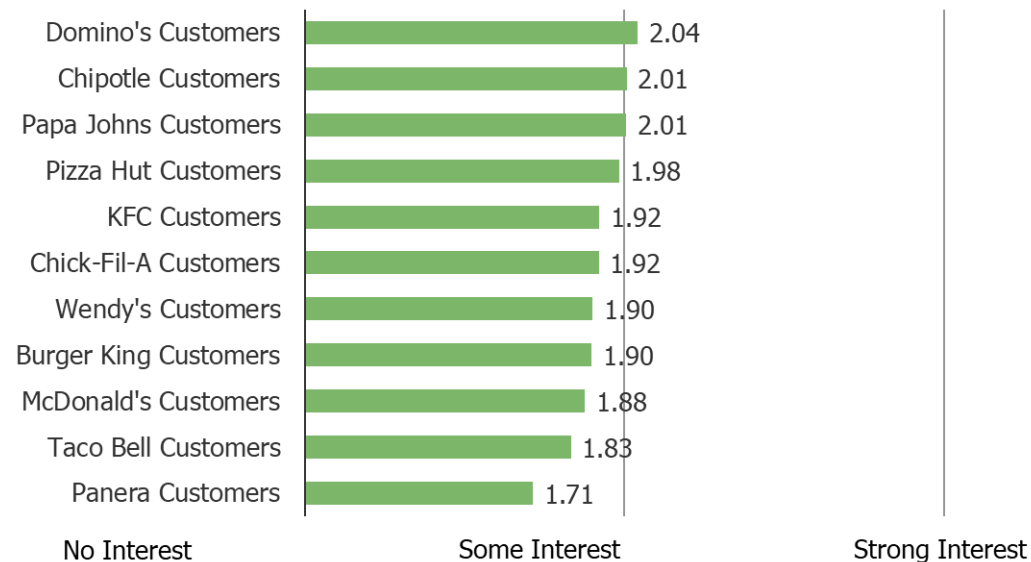
- *The greatest competitive impact is likely to be felt by Pizza competitors, including Domino's, Papa John's, Pizza Hut, etc.*
  - *Customers of these pizza chains show the strongest interest in trying it, the highest likelihood of having it often, and the highest likelihood of going to Popeye's more now than they have been because of the chicken sandwich.*

**Popeye's announced that the chicken sandwich will be coming back to their restaurants on November 3rd 2019. How much interest do you have in getting the sandwich after it becomes available again?**

*Posed to all respondents*



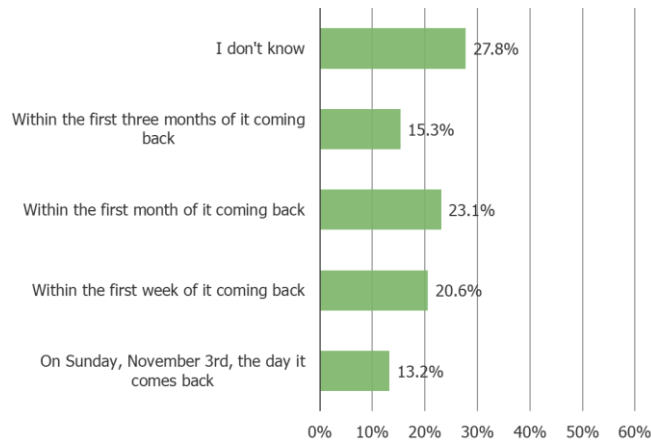
*Cross-Tabbed By  
Customer Base (Regularly  
or Occasionally dines in  
or orders out from this  
restaurant).*



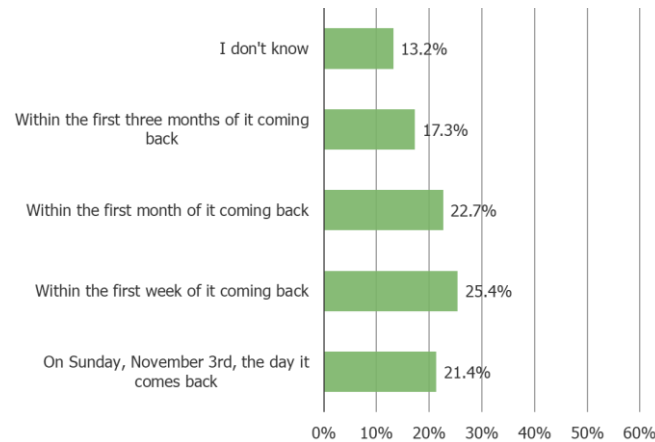
## When do you think you will get the sandwich?

*Posed to respondents who have some interest or strong interest in getting the chicken sandwich from Popeye's.*

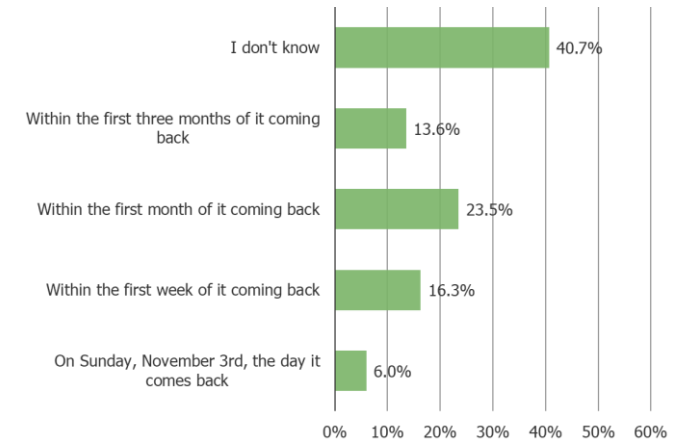
### ALL INTERESTED IN TRYING IT



### HAS HAD IT BEFORE AND INTERESTED



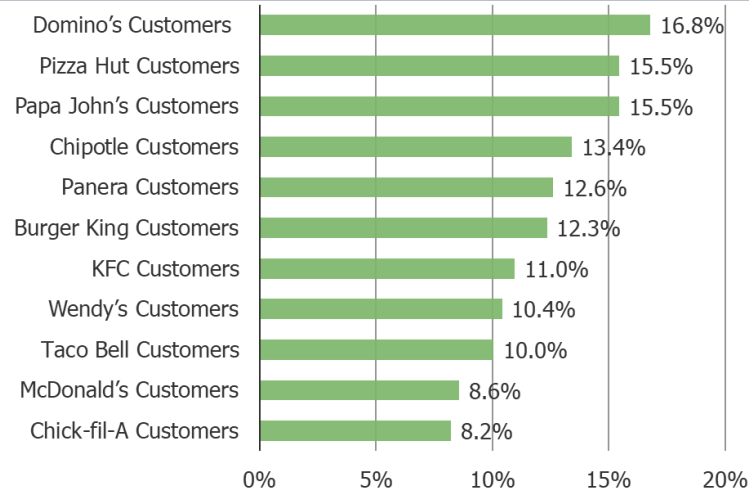
### HAS NEVER HAD IT AND INTERESTED



## When do you think you will get the sandwich? (CROSS TABS)

*Posed to respondents who have some interest or strong interest in getting the chicken sandwich from Popeye's (cross-tabbed by respondents who regularly or occasionally eat each of the following).*

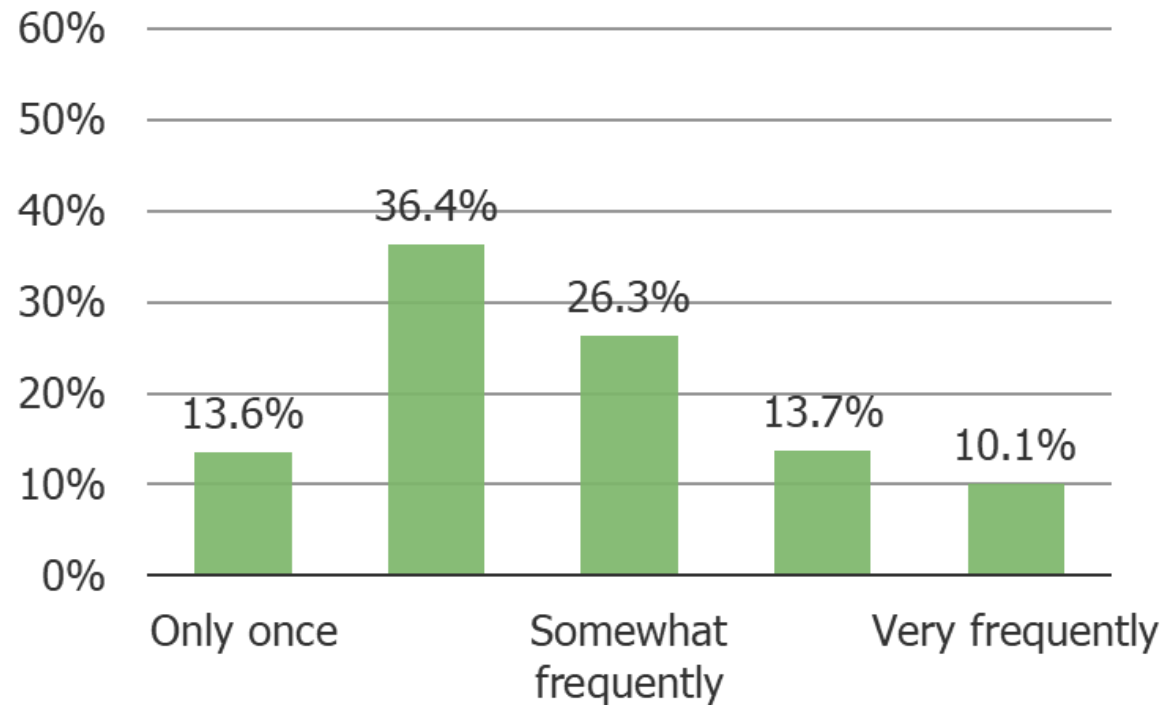
### DAY IT IS RELEASED (NOVEMBER 3<sup>RD</sup>)



	On Sunday, November 3rd, the day it comes back	Within the first week of it coming back	Within the first month of it coming back	Within the first three months of it coming back	I don't know
Domino's Customers	16.8%	21.5%	22.8%	14.8%	24.2%
Pizza Hut Customers	15.5%	24.2%	26.1%	14.0%	20.3%
Papa John's Customers	15.5%	25.2%	22.0%	13.0%	24.4%
Chipotle Customers	13.4%	26.8%	23.7%	13.4%	22.7%
Panera Customers	12.6%	22.2%	23.0%	17.0%	25.2%
Burger King Customers	12.3%	22.7%	22.4%	14.3%	28.3%
KFC Customers	11.0%	22.8%	21.5%	14.5%	30.3%
Wendy's Customers	10.4%	17.8%	22.3%	16.0%	33.5%
Taco Bell Customers	10.0%	19.7%	24.3%	13.1%	32.8%
McDonald's Customers	8.6%	19.3%	25.1%	15.2%	31.8%
Chick-fil-A Customers	8.2%	22.7%	24.6%	13.0%	31.4%

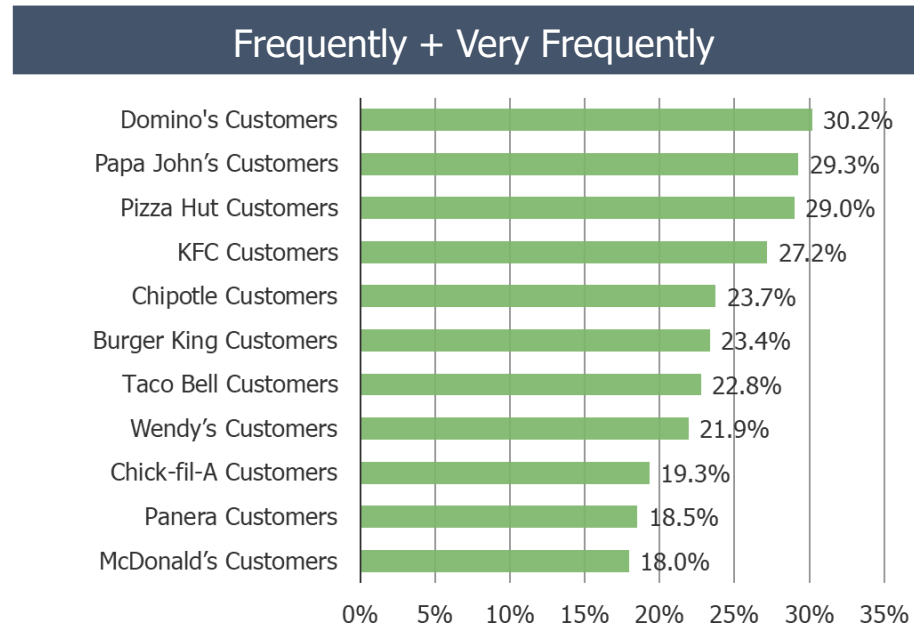
## How often do you think you will get the chicken sandwich from Popeye's?

*Posed to respondents who have some interest or strong interest in getting the chicken sandwich from Popeye's.*



## How often do you think you will get the chicken sandwich from Popeye's?

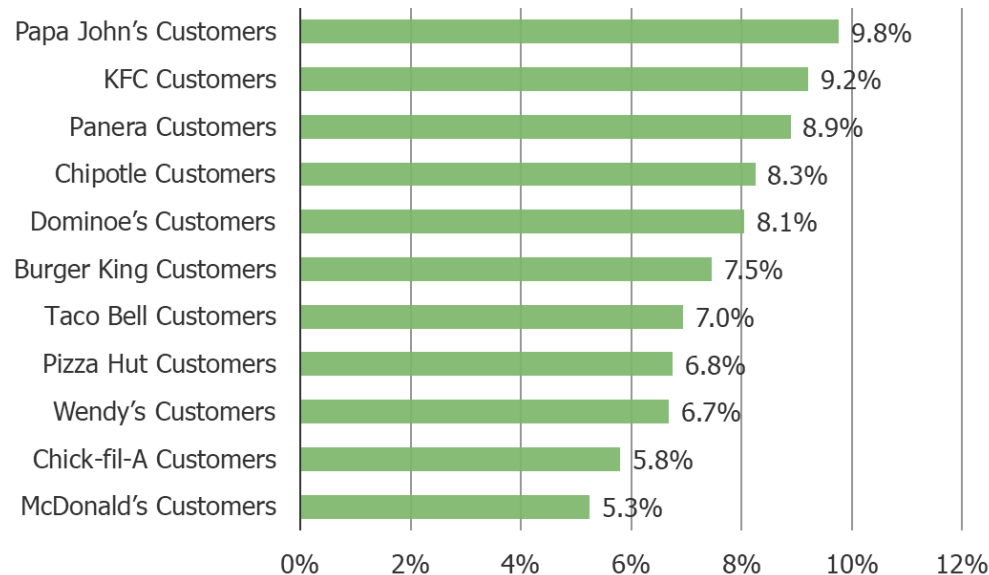
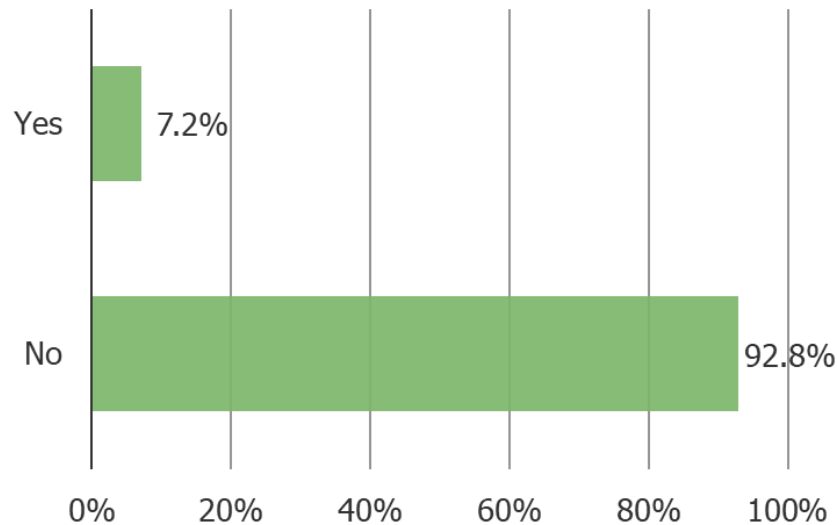
*Posed to respondents who have some interest or strong interest in getting the chicken sandwich from Popeye's.*



	Only once	Infrequently	Somewhat frequently	Frequently	Very frequently
Domino's Customers	9.40%	38.93%	21.48%	17.45%	12.75%
Papa John's Customers	8.94%	37.40%	24.39%	19.51%	9.76%
Pizza Hut Customers	9.66%	35.75%	25.60%	15.46%	13.53%
KFC Customers	12.28%	35.53%	25.00%	15.79%	11.40%
Chipotle Customers	13.40%	41.24%	21.65%	14.43%	9.28%
Burger King Customers	13.31%	36.69%	26.62%	13.64%	9.74%
Taco Bell Customers	13.13%	41.31%	22.78%	13.90%	8.88%
Wendy's Customers	13.38%	42.75%	21.93%	15.24%	6.69%
Chick-fil-A Customers	12.56%	41.55%	26.57%	12.08%	7.25%
Panera Customers	10.37%	49.63%	21.48%	11.85%	6.67%
McDonald's Customers	13.26%	43.09%	25.69%	11.88%	6.08%

## Do you think the chicken sandwich will cause you to reduce your usage of any other fast food/casual dining restaurants?

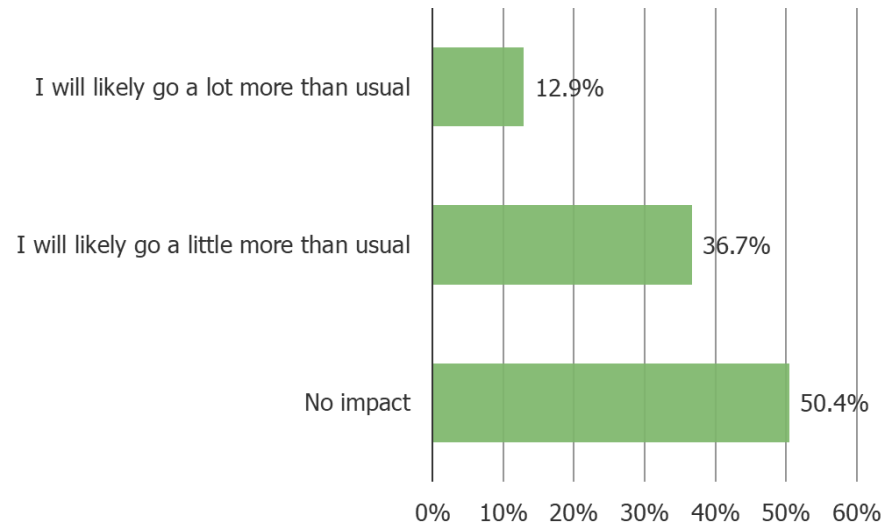
*Posed to respondents who have some interest or strong interest in getting the chicken sandwich from Popeye's.*



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## Do you anticipate that the availability of the chicken sandwich will change how often you eat at Popeye's?

*Posed to respondents who have some interest or strong interest in getting the chicken sandwich from Popeye's.*



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