

## BACKGROUND:

- ❑ We surveyed 1,500 US consumers balanced to census to collect some feedback on Popeye's and Fried Chicken Sandwich Wars.

## FINDINGS:

### ❑ **Popeye's Traffic**

- ❑ In January Popeye's traffic came back closer to normal range following an above seasonal increase in November and December in the immediate aftermath of the chicken sandwich relaunch. The January reading is slightly elevated compared to a year ago, but doesn't show the same above normal levels that November and December exhibited.

### ❑ **Around Half of Popeye's Customers Said They Have Recently Increased Visits Because of the Chicken Sandwich**

- ❑ Popeye's customers are among the most likely to say they have recently increased visits because of the fried chicken menu item, but they are middle of the road when it comes if they expect their visits to stay increased.

### ❑ **Popeye's Customers are the Most Likely of the Chicken Sandwich QSR's to Say They've Had It "Once But Not Again Since"**

- ❑ Popeye's has the highest share of people saying they have had it "once but not again since" and is on the lower range of the % of customers who have had it "many times."

### ❑ **Which QSR's Have Been Impacted The Most By The Popeye's Chicken Sandwich?**

- ❑ The more a customer has been engaged with the Popeye's chicken sandwich, the more likely they are to have said it has caused them to reduce eating at other QSR's. KFC, Chick-fil-A, and McDonald's were named by the highest percentage of Popeye's customers as places they have been going to less because of the Popeye's sandwich.

### ❑ **Chicken Wars Competitive Dynamics**

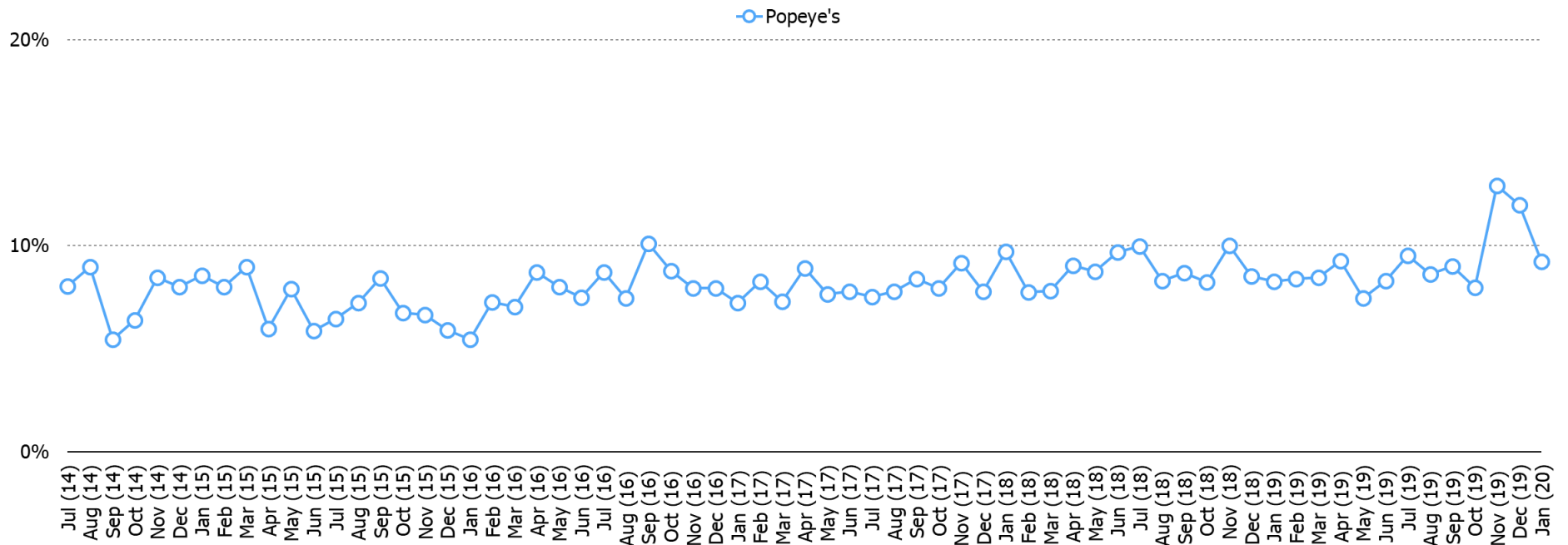
- ❑ Sentiment feedback is strongest around the Chick-fil-A sandwich and the Shake Shack Chick'n Shack.



**TRAFFIC TRENDS**

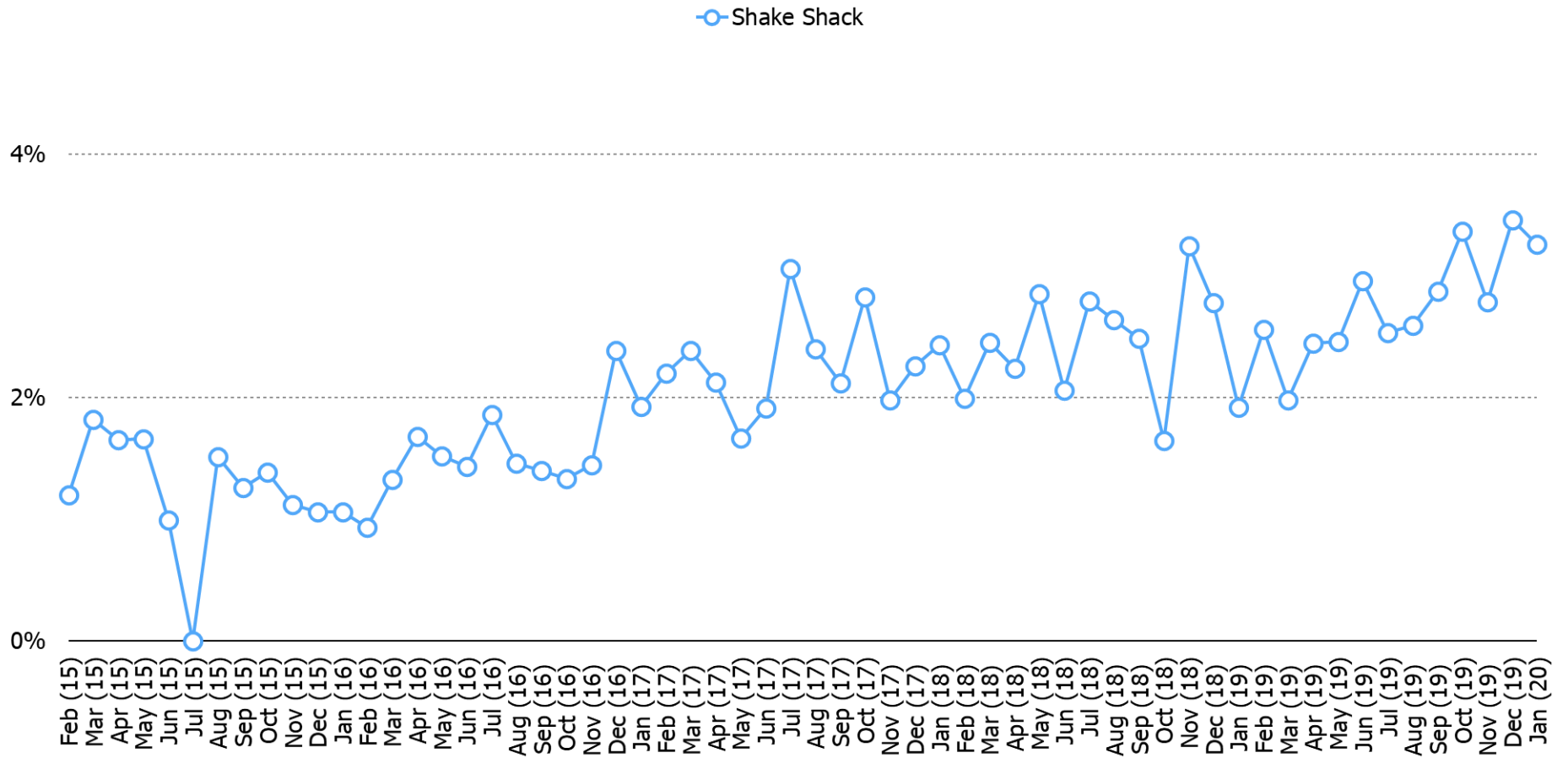


Have you visited any of the following in the past month? % Who Selected Popeye's  
 Posed to all respondents.

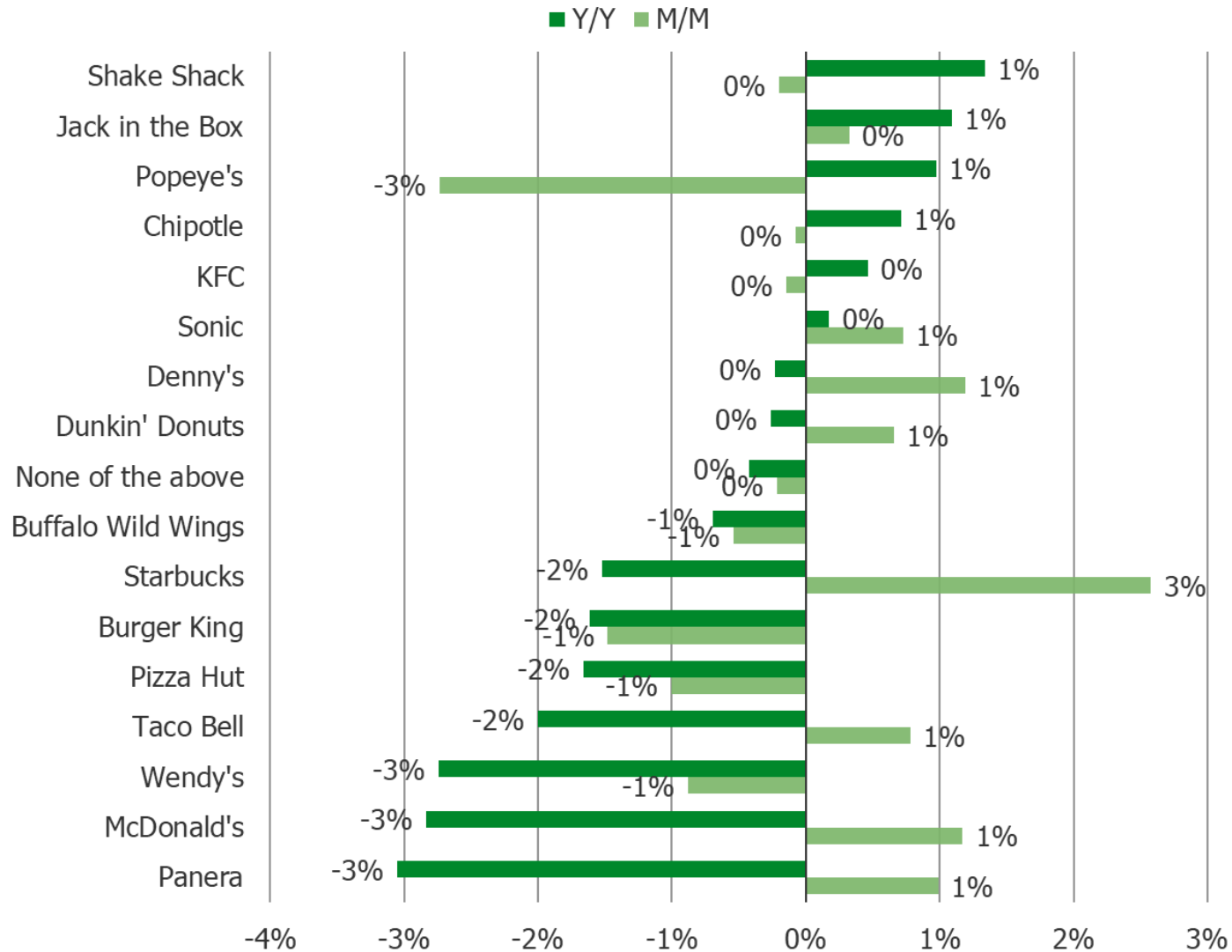


Have you visited any of the following in the past month? % Who Selected Shake Shack

*Posed to all respondents.*

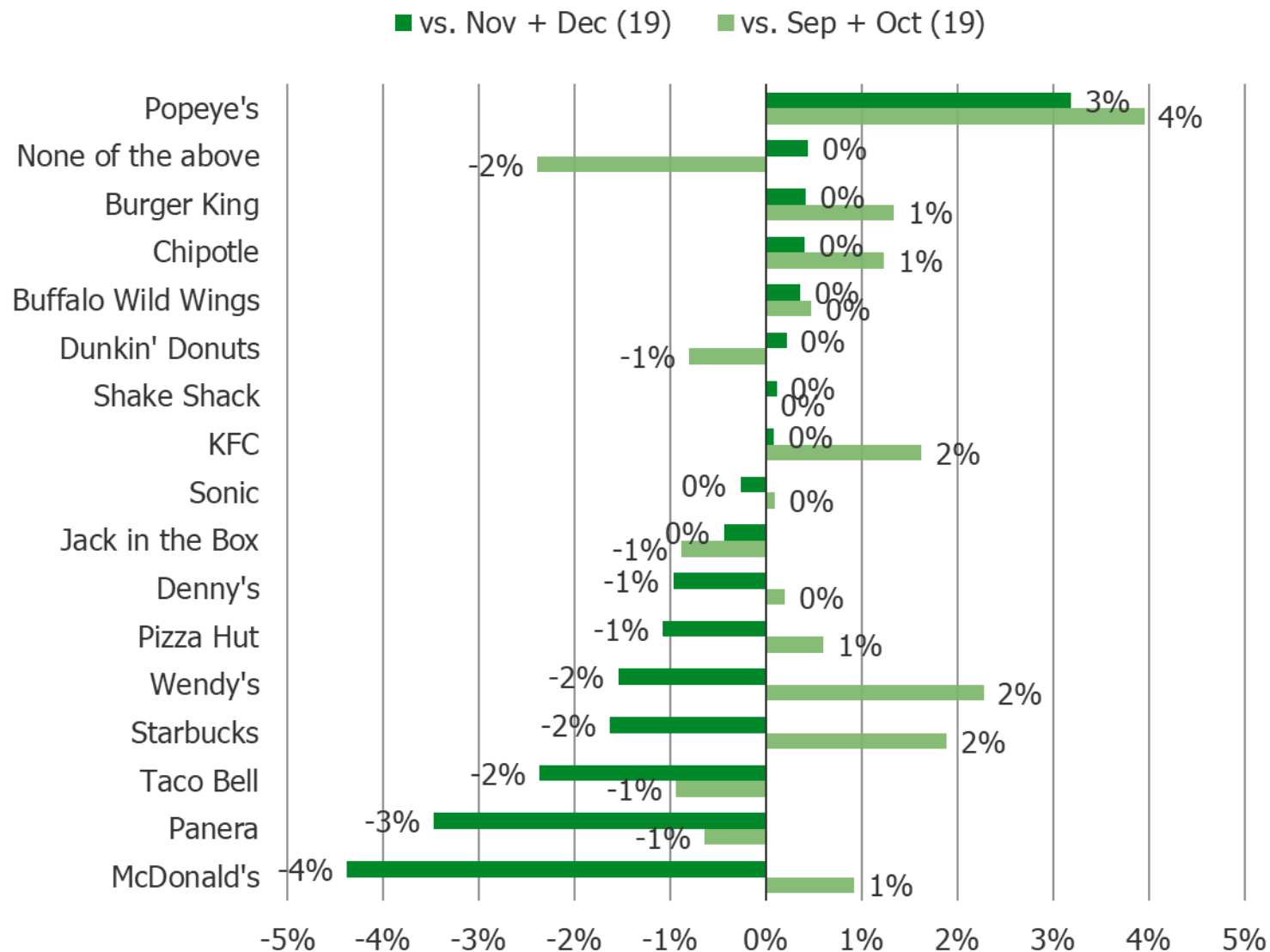


Have you visited any of the following in the past month? **Comparing January Readings M/M and Y/Y**  
*Posed to all respondents.*



Have you visited any of the following in the past month? **Comparing November + December Readings with A) September + October 2019 and November+December 2019.**

*Posed to all respondents.*

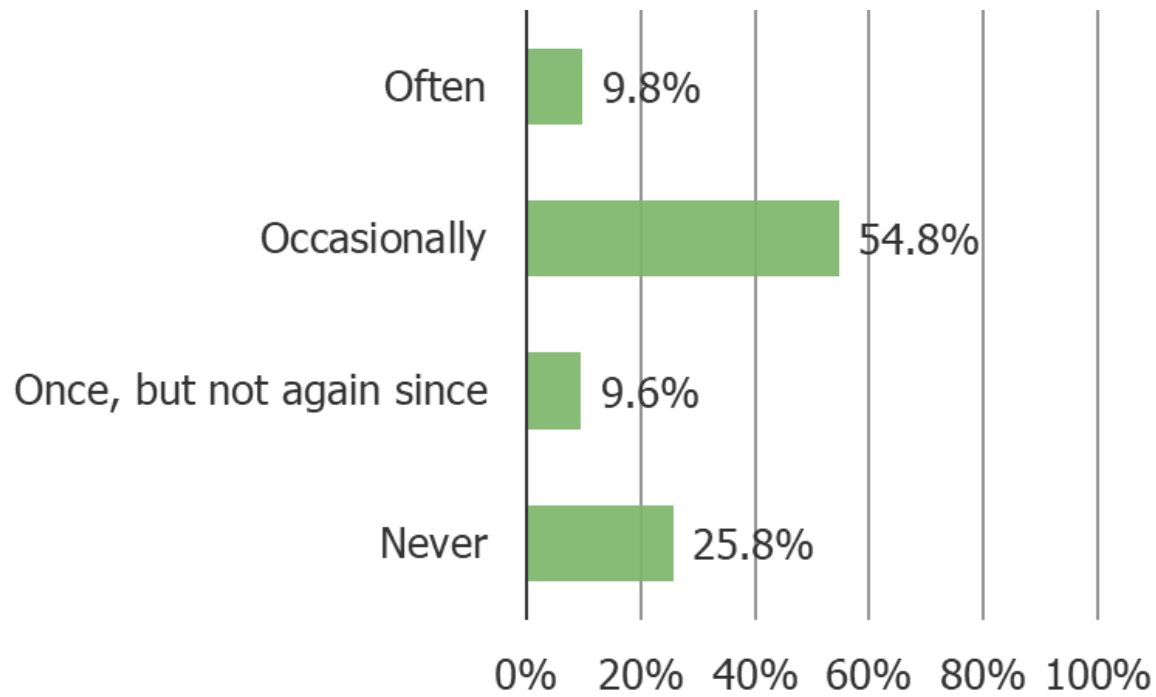


**FRIED CHICKEN SANDWICH WARS**



How often do you eat fried chicken sandwiches?

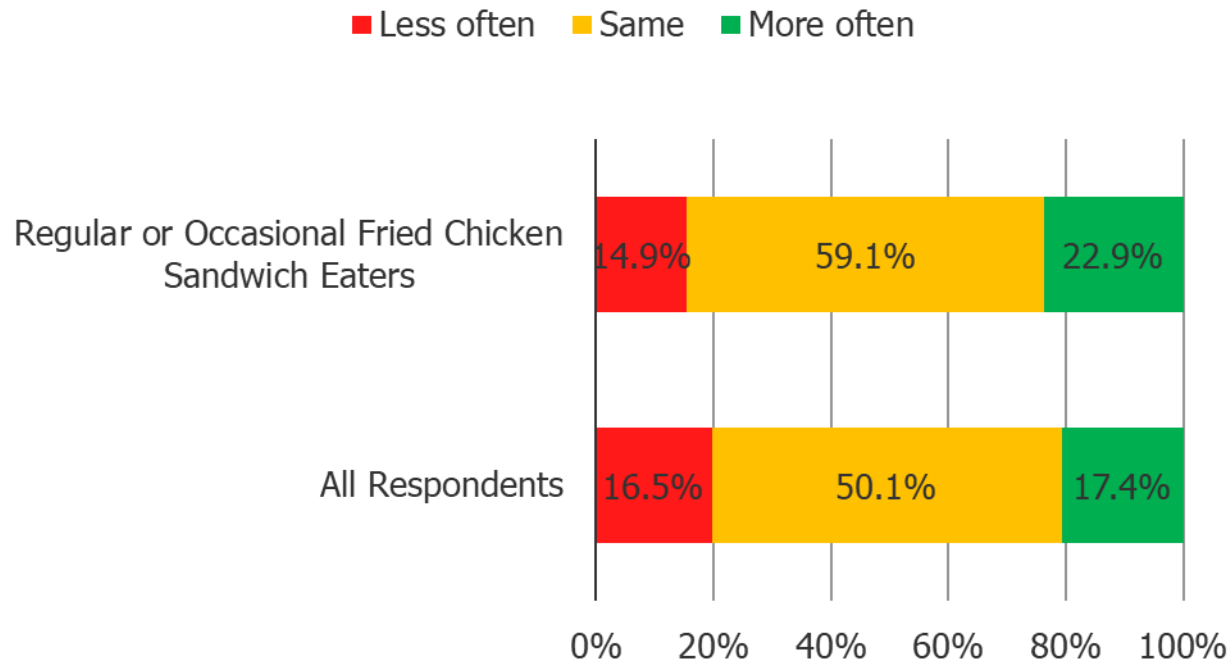
*Posed to all respondents.*





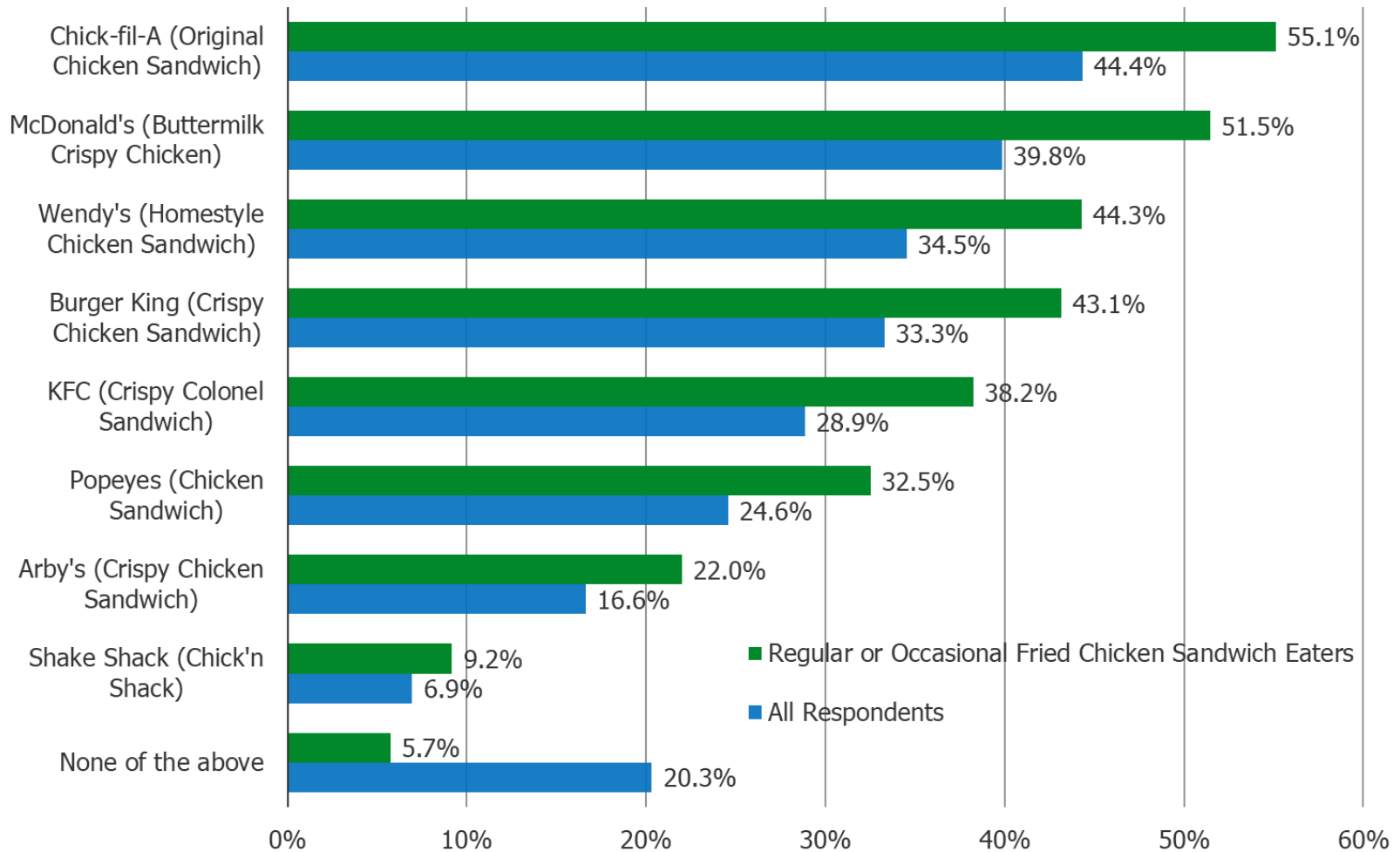
Are you changing how often you eat fried chicken sandwiches?

*Posed to all respondents.*



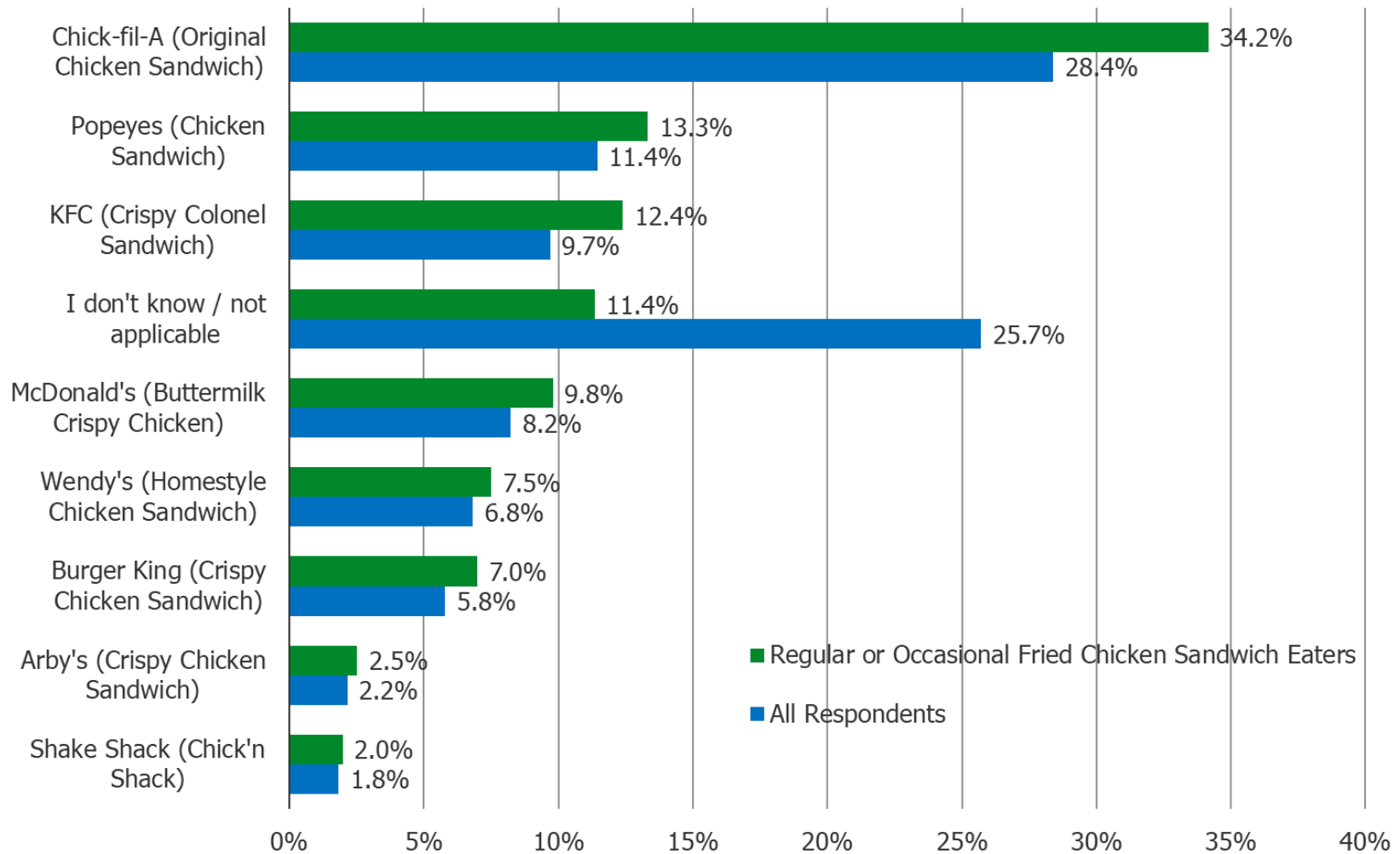
Have you ever had any of the following chicken sandwiches? (Select ALL that apply)

*Posed to all respondents.*



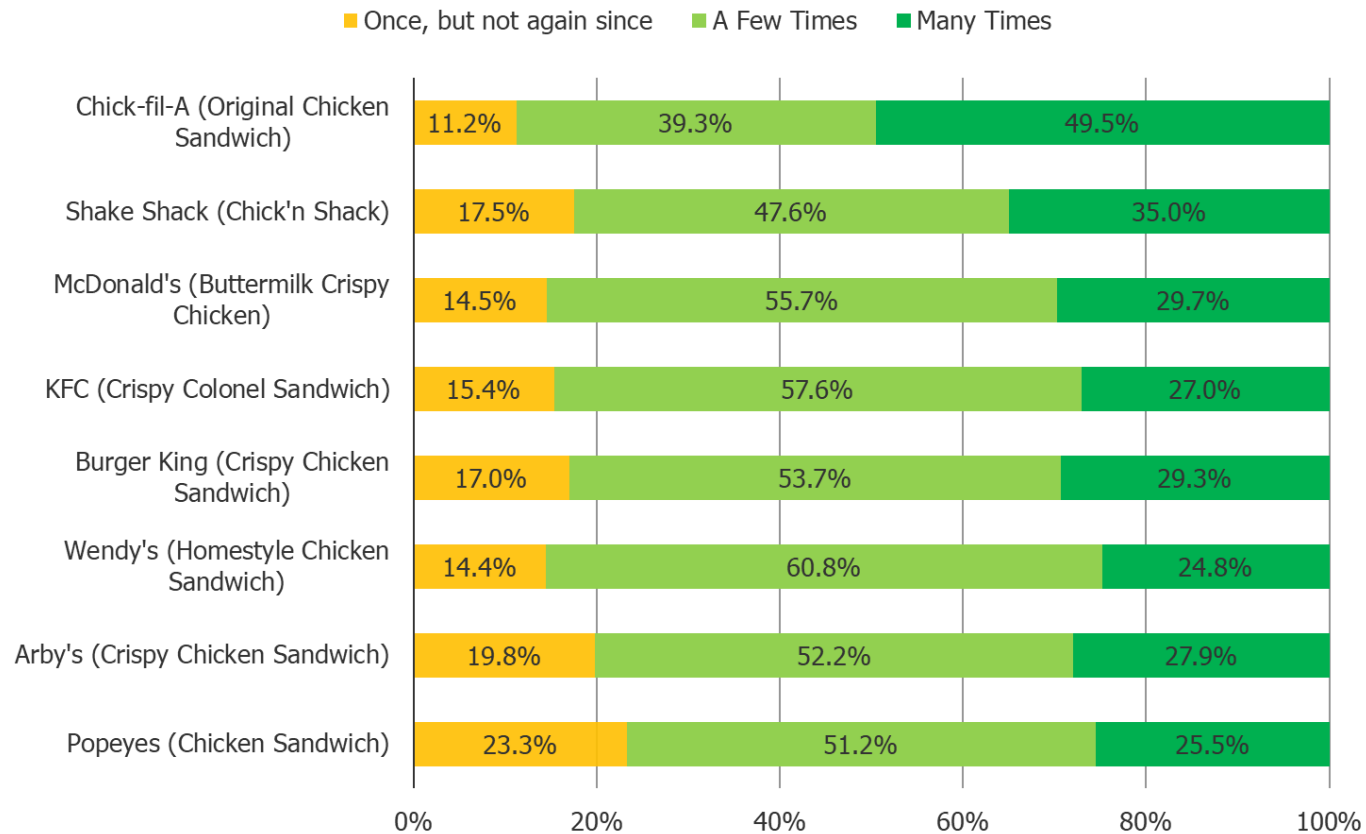
In your opinion, who has the best chicken sandwich?

*Posed to all respondents.*

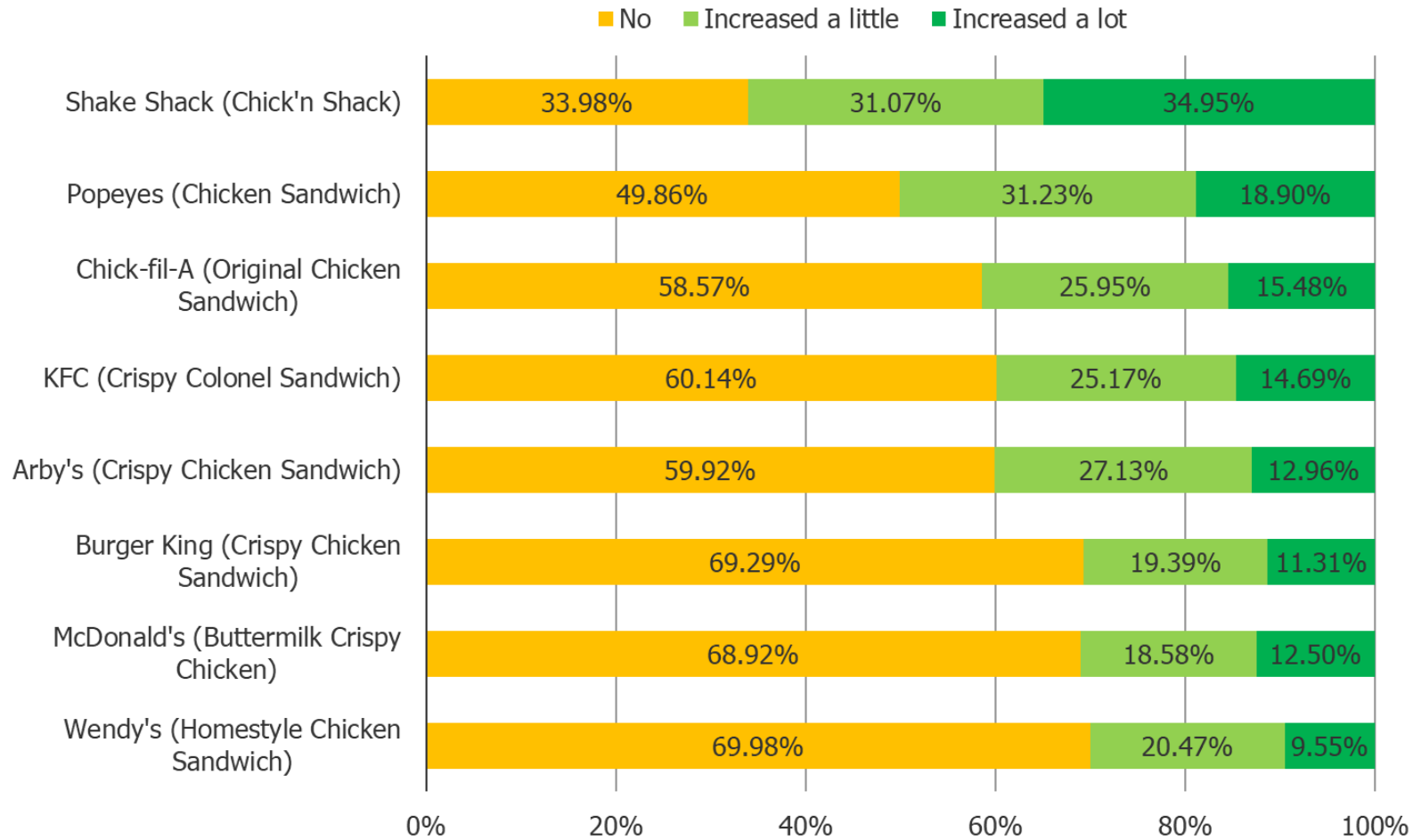


How many times have you had this chicken sandwich?

*Posed to respondents who have had each of the following sandwiches.*

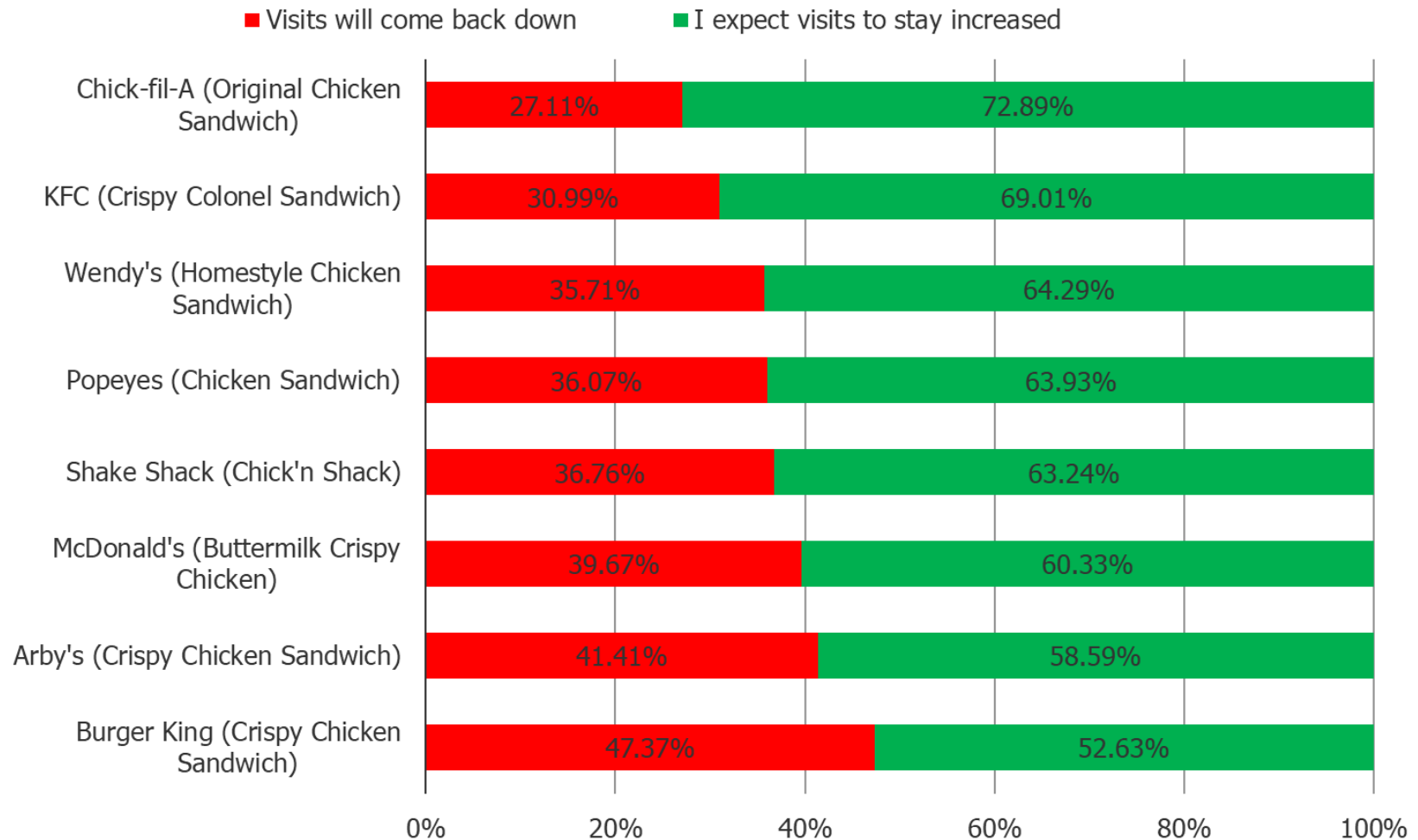


Have you recently increased how often you visit this restaurant because of the fried chicken menu item?  
*Posed to respondents who have had each of the following sandwiches.*

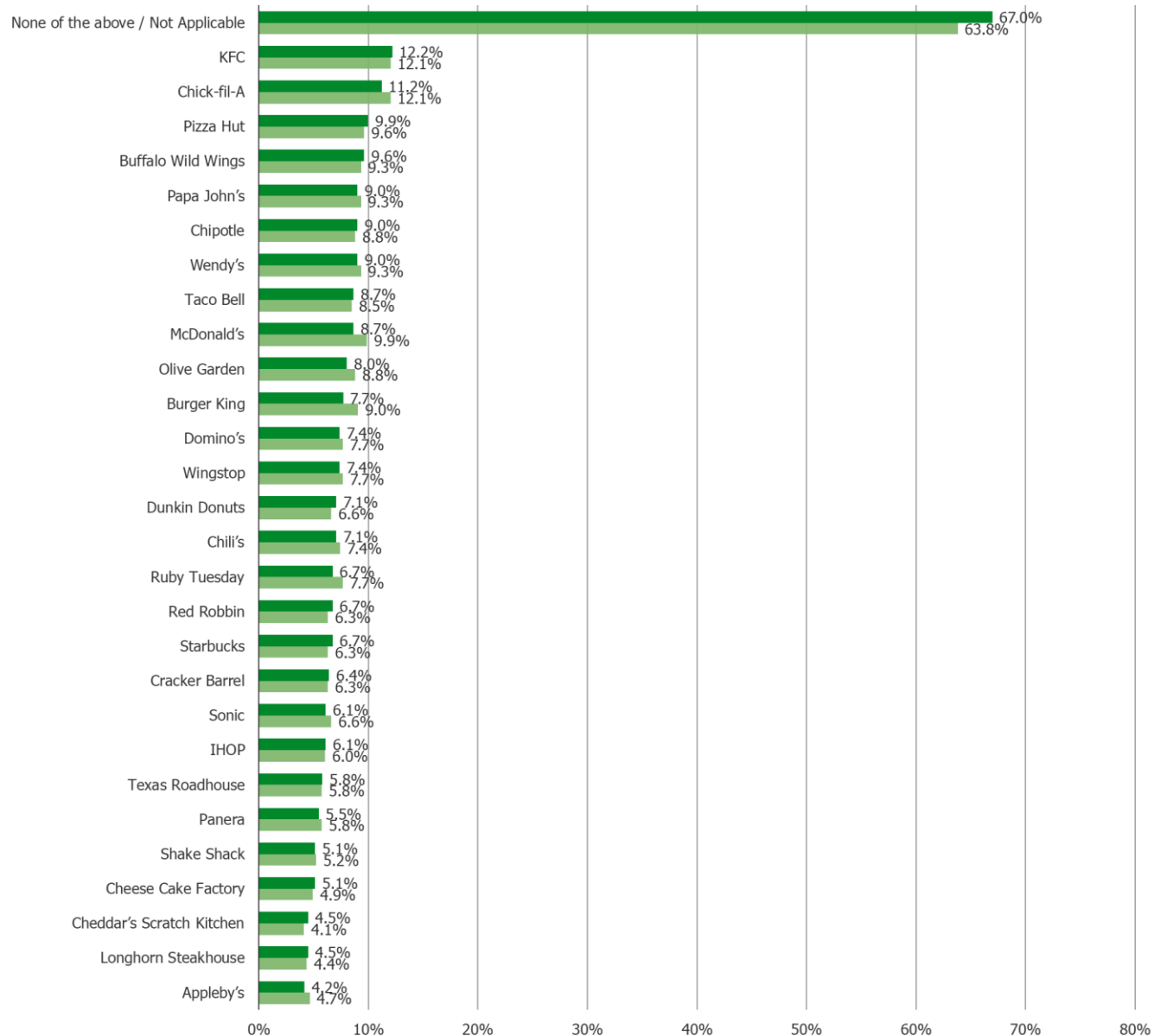


Do you expect to continue going there at an increased rate because of the chicken sandwich, or come back down?

*Posed to respondents who have had each of the following sandwiches AND said they have recently increased their visits because of the chicken sandwich menu item.*



Has the Popeye's Chicken Sandwich caused you to reduce having any of the following? (Select ALL)  
 Posed to respondents who has had the Popeye's Chicken Sandwich.



Has the Popeye's Chicken Sandwich caused you to reduce having any of the following? (Select ALL)  
*Posed to respondents who has had the Popeye's Chicken Sandwich (Cross-Tabs Below).*

	Has Had Popeye's Sandwich	Has Had Popeye's Sandwich Many Times	Has Been Going To Popeye's More Often Recently Because of Chicken Sandwich
None of the above / NA	63.8%	43.0%	39.9%
KFC	12.1%	21.5%	21.3%
Chick-fil-A	12.1%	19.4%	20.2%
McDonald's	9.9%	15.1%	18.0%
Buffalo Wild Wings	9.3%	17.2%	16.4%
Wendy's	9.3%	14.0%	16.4%
Pizza Hut	9.6%	15.1%	16.4%
Olive Garden	8.8%	15.1%	15.9%
Burger King	9.0%	15.1%	15.9%
Papa John's	9.3%	15.1%	15.3%
Chipotle	8.8%	19.4%	14.8%
Wingstop	7.7%	18.3%	14.2%
Taco Bell	8.5%	12.9%	14.2%
Ruby Tuesday	7.7%	10.8%	13.7%
Chili's	7.4%	11.8%	13.1%
Domino's	7.7%	17.2%	13.1%
Dunkin Donuts	6.6%	11.8%	12.6%
Cracker Barrel	6.3%	11.8%	12.0%
Red Robbin	6.3%	12.9%	12.0%
Starbucks	6.3%	11.8%	11.5%
Sonic	6.6%	11.8%	11.5%
IHOP	6.0%	15.1%	10.9%
Texas Roadhouse	5.8%	9.7%	10.4%
Shake Shack	5.2%	8.6%	9.8%
Cheese Cake Factory	4.9%	7.5%	9.3%
Panera	5.8%	5.4%	9.3%
Appleby's	4.7%	6.5%	8.7%
Longhorn Steakhouse	4.4%	11.8%	7.7%
Cheddar's Scratch Kitchen	4.1%	8.6%	6.6%

