



Numerator

The Chicken Sandwich Wars

How the Popeyes New Item Launch Won Competitive Trips and Re-Defined the QSR Landscape

Pre-Popeyes launch, Chick-fil-A dominated the market

Chicken Sandwich Share of Wallet



Source: Numerator Retailer Share of Wallet Report, Chicken Sandwiches & Wraps, 7/15/19-8/11/19

The Popeyes launch drove chicken sandwich trips across the board

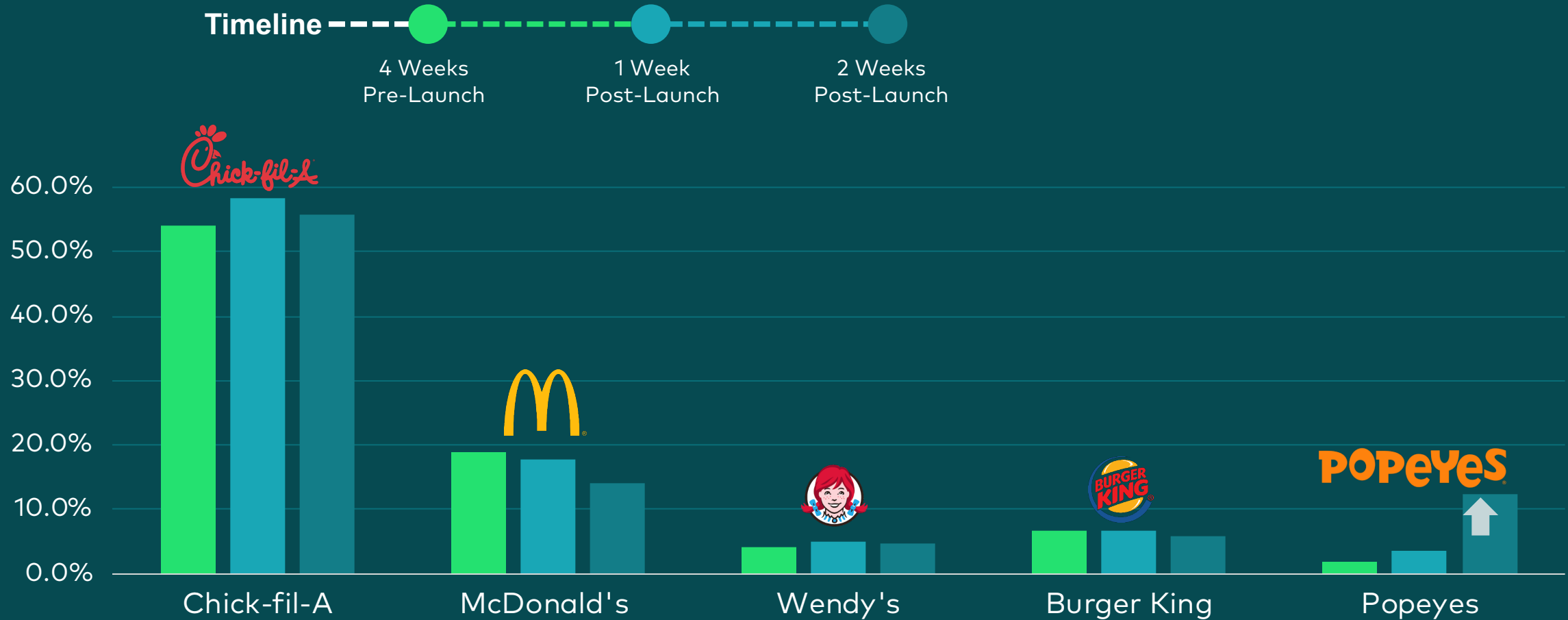
Chicken Sandwich Share of Wallet



Source: Numerator Retailer Share of Wallet Report, Chicken Sandwiches & Wraps, 7/16/19-8/19/20

Momentum continued two weeks post-launch

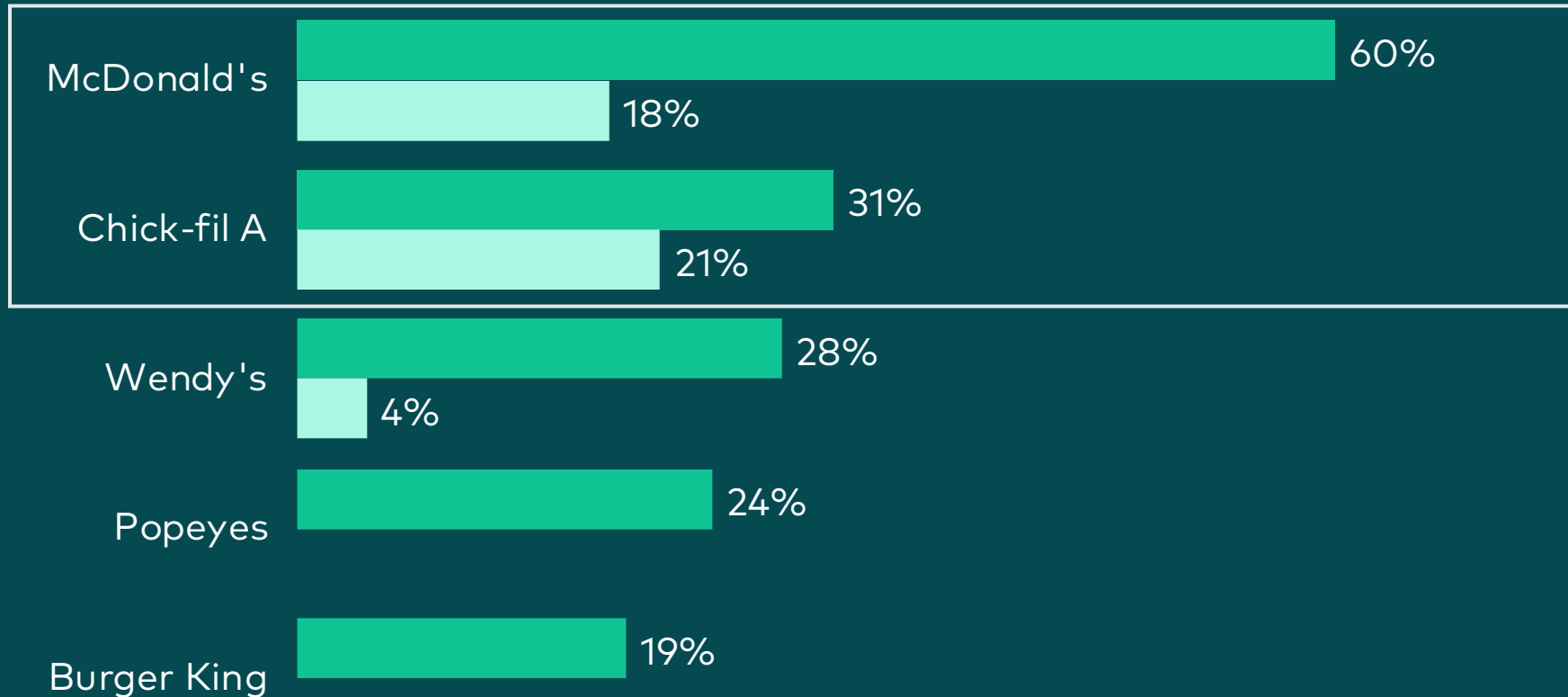
Chicken Sandwich Share of Wallet



Traditional chicken sandwich heavyweights lost the most trips

New Popeyes guests, behavior in the month prior to launch

- Bought anything at QSR
- Bought a Chicken Sandwich / Wrap at QSR



Source: Numerator Lapsed, Repeat, New Report, 7/12/2019-8/11/2019 compared to prior period

The launch captured competitive guests and drove switching

Competitive Guest Behavior: the month prior to launch

87.3%

Purchased anything at other QSRs in the month prior to the launch



12.7%

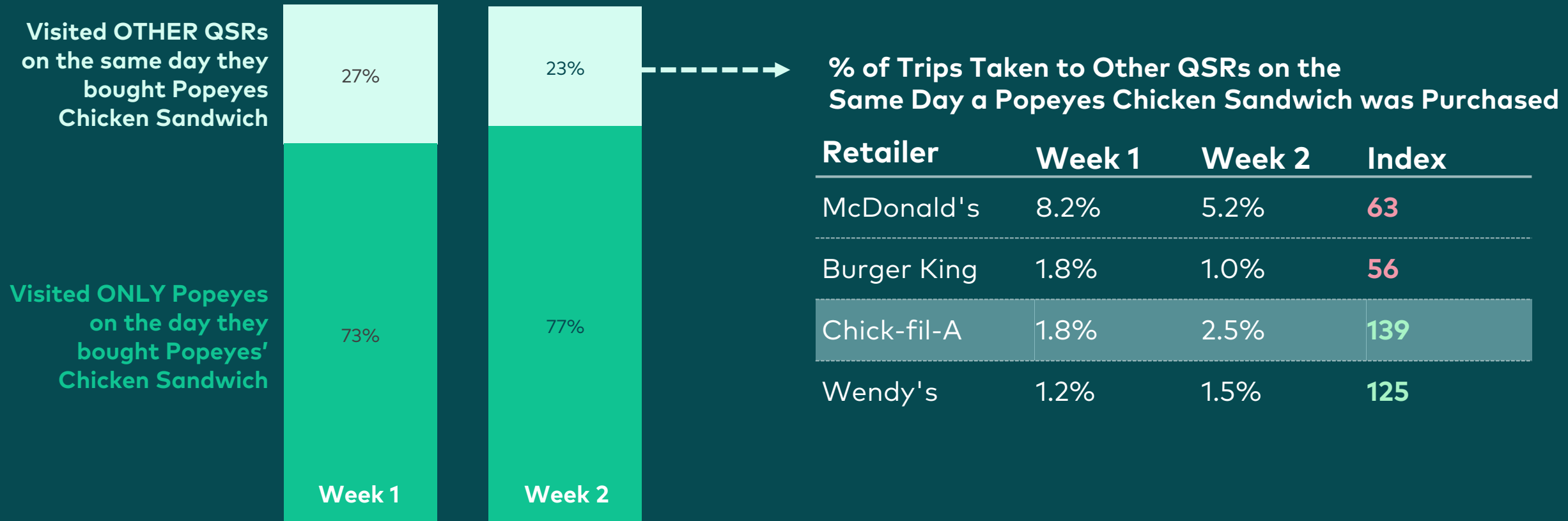
Did not Purchase anything at other QSRs in the month prior to the launch

43.5%

Purchased a Chicken Sandwich or Wrap at other QSRs in the month prior to the launch

The Popeyes launch converted competitive trips

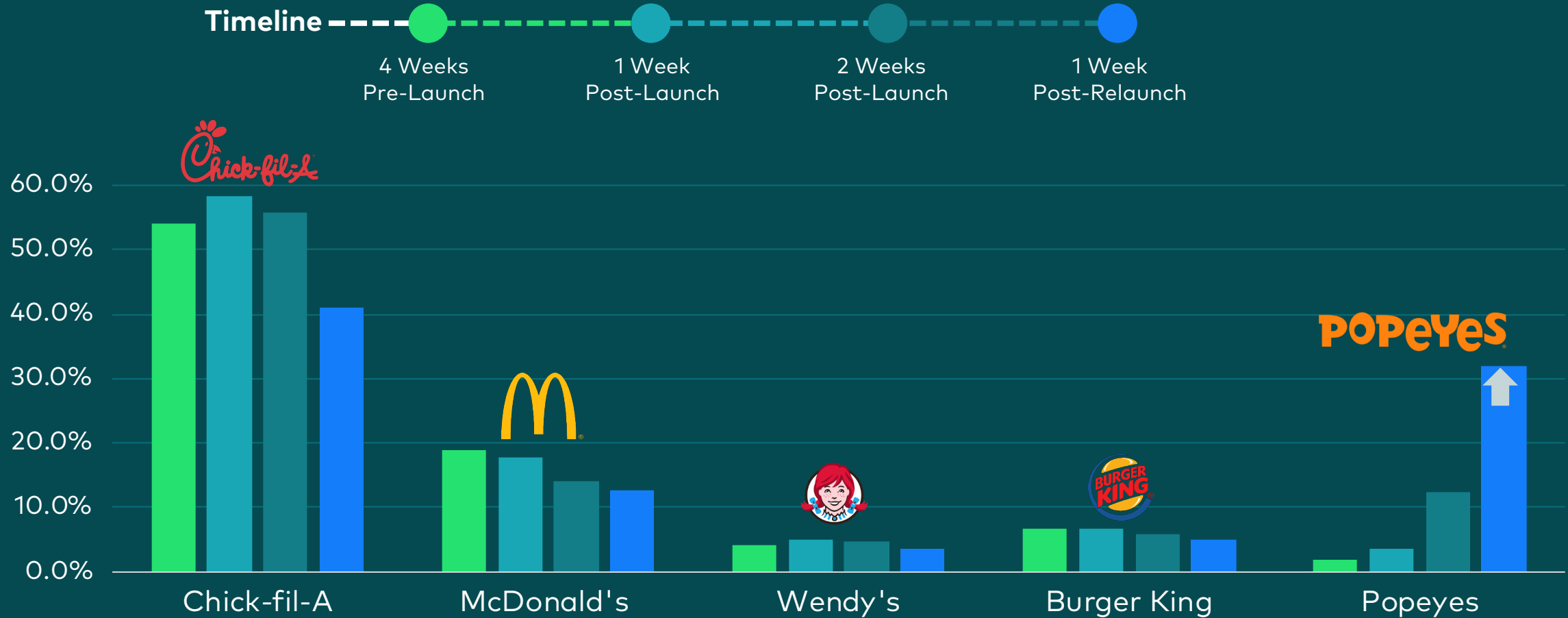
New Guest Behavior: same day trips



Source: Numerator Trip Circuit Report, Daily Circuits where Popeyes Chicken Sandwich Was Purchased, 8/12/19-8/26/19

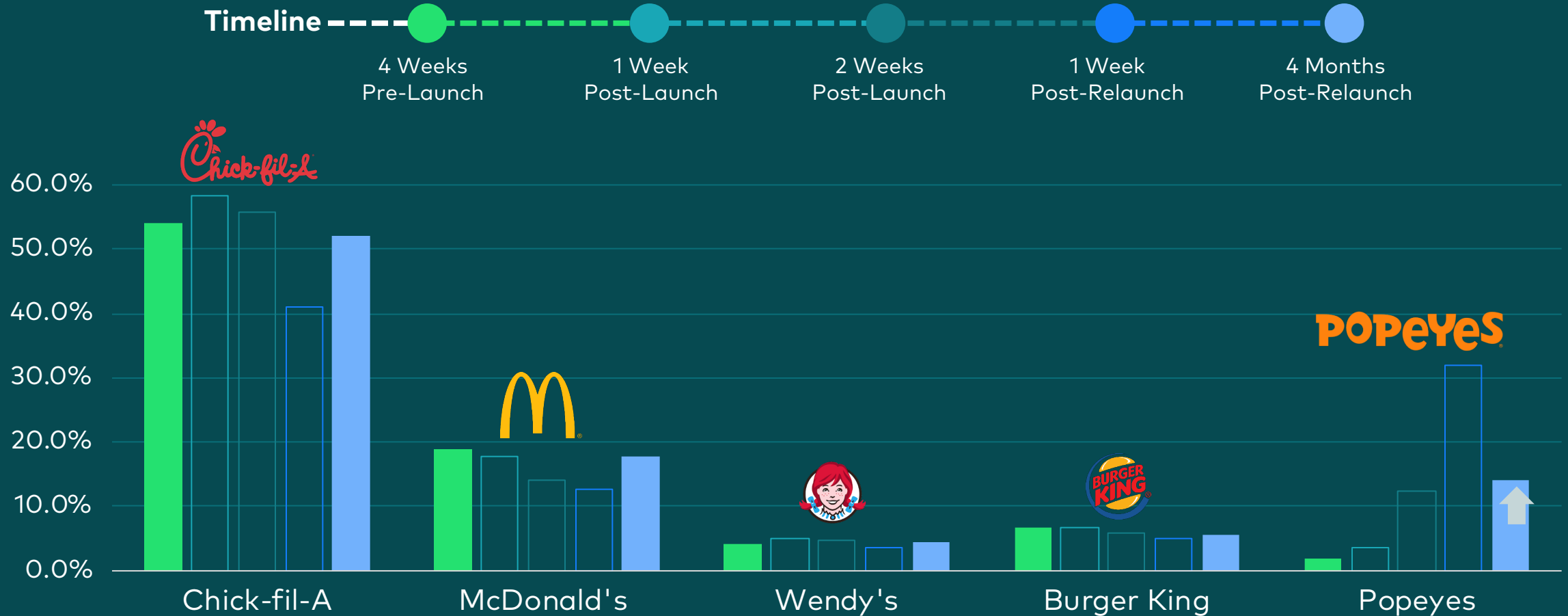
Post-relaunch, all competitors lost share to Popeyes

Chicken Sandwich Share of Wallet



Popeyes saw sustained growth and generated lift in the category

Chicken Sandwich Share of Wallet



Source: Numerator Retailer Share of Wallet Report, Chicken Sandwiches & Wraps, 7/16/19-3/3/20

Popeyes' new item launch drove sustained growth by capturing more trips. How can other QSRs do the same?



Pinpoint which consumer segments your restaurant does not currently attract. Popeyes' launch attracted **younger, more affluent visitors** than existing Popeyes guests.

Numerator Insights Report: **Shopper Profile** to understand competitors' guests



Research which items your target segments buy at competitive QSRs. Popeyes **converted trips** from McDonald's and Chick-Fil-A.

Numerator Insights Report: **Leakage Tree** to uncover competitive purchase behavior



Create the messaging that speaks to your target consumer segments. Popeyes' advertising struck a cord with **young consumers**.

Numerator Insights Report: **Psychographics** to analyze consumer opinions



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omnichannel consumer

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