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# Menu Engineering Sounds Bytes Customization is Key!





# Diagnosis: Menu Board Anxiety

Yesterday



Today



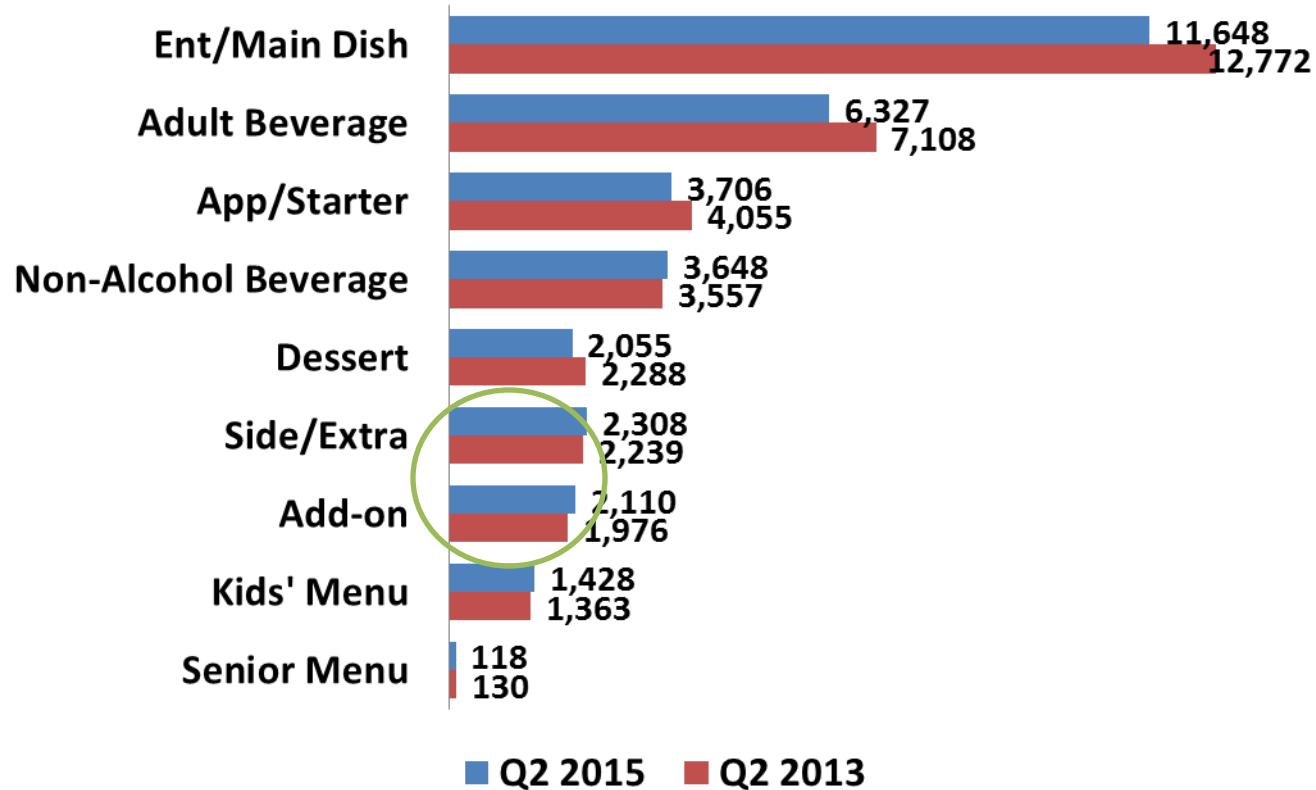
*Both paper menus and menu boards have become overwhelming and unfocused. Confusion has affected brand identity and guest satisfaction, while contributing to slower service times and operational headaches.*





# Prescription: Across Canadian Menus, Major Categories Decline While Add-Ons And Extras Inch Higher

Canadian Menu Items By Mealpart



*After the average Canadian chain restaurant menu hit about 108 items in 2013, operators began cutting back, leading to a phenomenon Technomic calls “the incredible shrinking menu.”*

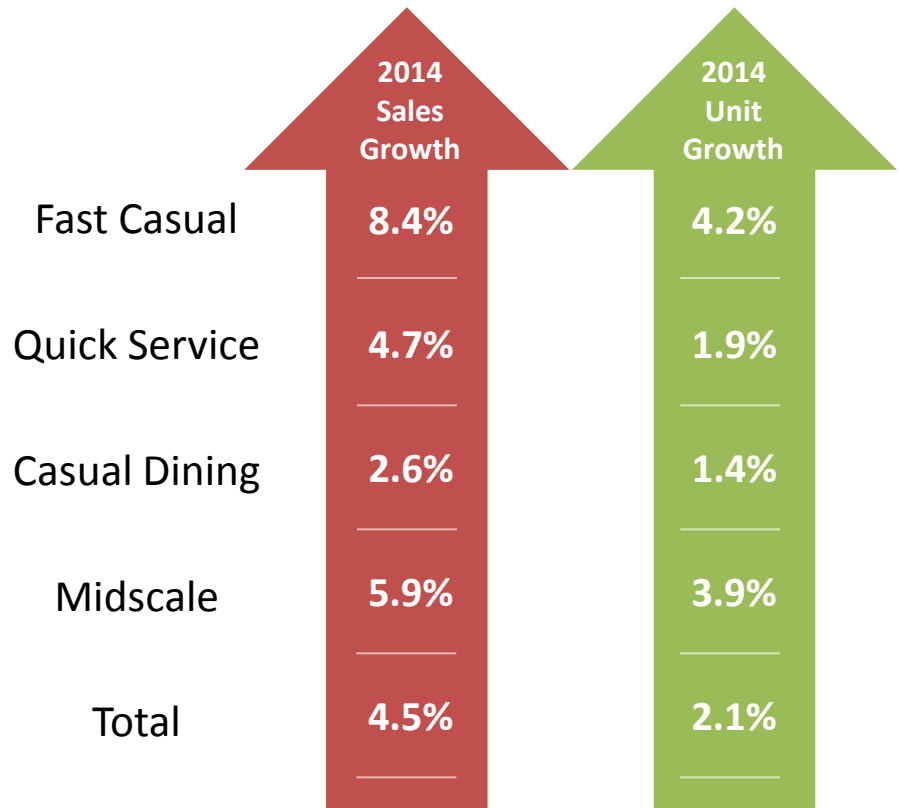


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# Explaining The Shift: The Fast-Casual Model

Canadian Restaurant Segment Growth



*8.4% sales growth at Canadian fast-casual chains was nearly twice the 2014 overall figure of 4.5%.*

*But while fast-casual sales steadily increase, menu boards remain modest in size. The average number of menu items for Canadian fast-casual chains is 74, about half as many the Canadian Top 200 average of 119.*





# Reality Check: U.S. Consumers Show Decreasing Interest In Menu Variety, More In Fresh Ingredients

## U.S. Restaurant Selection: Most Important Attributes



**Millennial**  
(born 1977–1992)  
AGE **22-37**



**Gen X**  
(born 1966–1976)  
AGE **38-48**



**Boomer**  
(born 1946–1965)  
AGE **49-68**

2014 2012





## Operator Reaction: Offer Fewer Sandwiches With Greater Variety

Total number of  
*sandwiches* across  
Canadian restaurant  
menus:

↓ 3.7%

Y-O-Y

Total number of  
*toppings* available on  
Canadian restaurant  
menus:

↑ 5.4%

Y-O-Y

*For many, customization = value. There are a variety of ways to incorporate customization into the sandwich menu, and many have simply optimized core offerings while opening up more custom, made-to-order sandwich possibilities via augmented add-ons.*




TAKEAWAY



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# Menu Forecast: Customization, Quality And Freshness Take Center Stage



Restaurants will be inspired to pare down and emphasize their core items.



*“All the effort that went into making that pot roast can now be focused on making **perfect sandwiches**”*



As consumers continue to seek **customization, quality and freshness**, menus will keep shrinking. A simpler menu streamlines operations by cutting down on training time as well as food and equipment costs. To compete with the share-grabbing fast-casual sector, the pressure is on other restaurant segments to trim their menus and **focus more on quality than quantity.**

