



INSPIRED INNOVATION

# Sandwich Sound Bytes

## Build and They Will Come!





# Panini Power: Rise of the Warm Sandwich

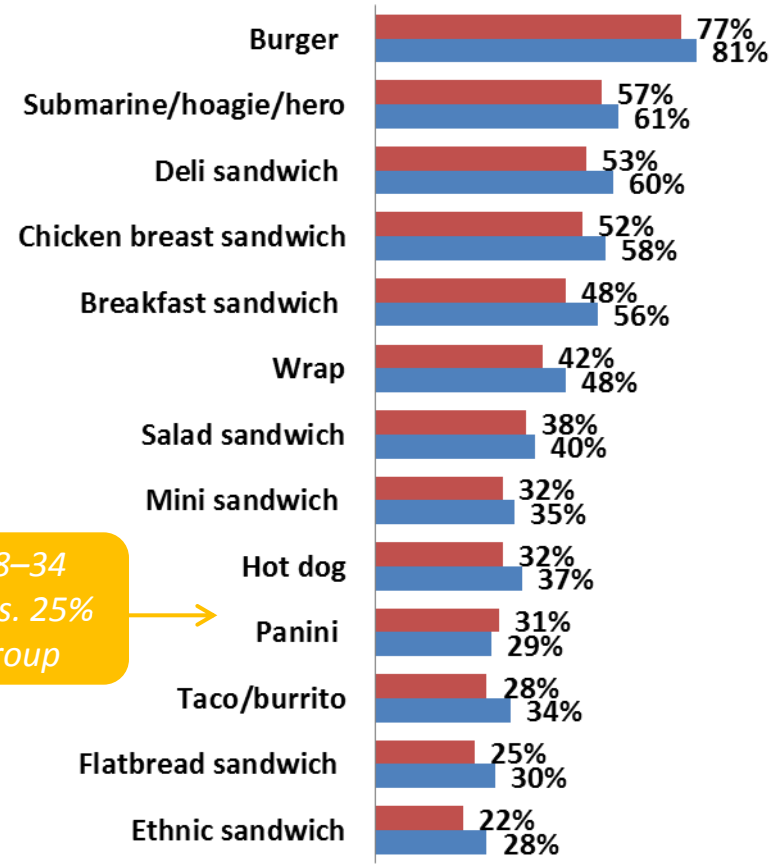
*For most sandwich types, Canadian consumers report a slight decline in monthly purchases away-from home.*



*Panini represents an important exception: 44% of Canadians (51% of 18-34 year-olds) now prefer their sandwiches toasted or grilled, compared to 42% in 2012.*

47% of 18-34 year-olds vs. 25% of 35+ group

**AFH Sandwich Consumption Frequency**  
*(Once-a-month plus shown)*



■ 2014 ■ 2012



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# Warming Trend: Heated Panini Provides Ideal Platform For Specialty Ingredients

## Top Panini Ingredients

Ingredient	Panini Penetration
Cheese	34.1%
Tomato	28.5%
Chicken	23.6%
Bacon	16.3%
Ham	13.0%
Mayonnaise	12.2%
Lettuce	12.2%
Turkey	12.2%
Greens	11.4%
Onion	10.6%
Swiss Cheese	10.6%
Red Onion	10.6%

## Fastest-Growing Panini Ingredients



Crab



Tomato Sauce



Tomato Pesto



Olive



Monterey Jack



Portobello



Artichoke





# The Need For Speed: Fast And Portable To Satisfy My Craving

**60%** of away-from-home sandwich purchases are for takeout

**40%** say they purchase grab-and-go sandwiches

## *Top Reasons For Recently Choosing A Breakfast Sandwich*



Craving/In The Mood

**50%**



Convenient Location

**43%**



Can Eat It On The Go

**42%**





# Custom Solutions: Contributing To The Sandwich Value Proposition

Canadians seek **overall value** when selecting where to source a sandwich: 77% at dinner, 75% at lunch



**84%** are more likely to visit a restaurant that offers **customization**, and 34% are willing to pay more for that ability

Among 18-34 year olds

**33%**

Seek self-serve build-your-own sandwich bars

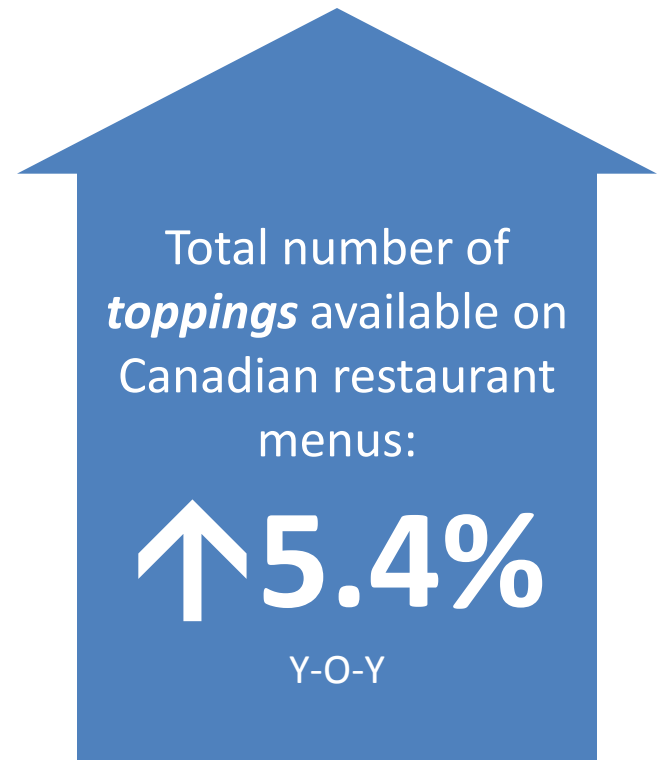
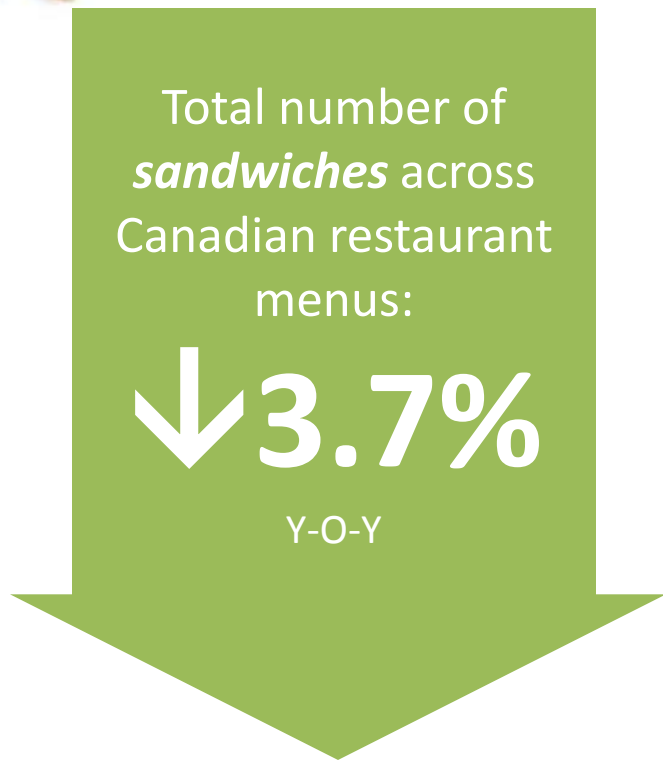
**AGE**







# Operator Reaction: Offer Fewer Sandwiches With Greater Variety



*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.*



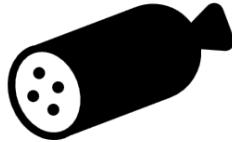


# Quality Vs. Quantity: Both Are Needed To Create A Winning Recipe

## What Makes A Good Sandwich?

Meat Quality

86%



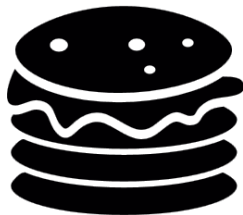
Bread Quality

86%



Ingredient Quantity

78%



## Top Factors When Deciding Where To Purchase A Sandwich

