FOODBYTES

JUNE 2017 | ISSUE 42 | YOUR FREE DATASSENTIAL TREND REPORT

PILE ON

THE SANDWICH INSIGHTS

SEE HOW IT ALL STACKS UP WITH OUR LATEST SANDWICHES KEYNOTE REPORT
58% of adults pack a sandwich for lunch at least once a week (and 68% pack one for their kid)

DATASSENTIAL’S 2017 SANDWHICHES KEYNOTE REPORT
What’s not to like about sandwiches? The classic meat and bread staple is endlessly customizable, versatile for any operation, and is a perennial consumer favorite. From ham and cheese to grilled cheese to BLTs and TLTs (tempeh, lettuce, and tomato), sandwiches are everywhere – nearly 7 out of 10 restaurants offer some type of sandwich on the menu.

Datassential first took an in-depth look at sandwiches in 2014 with the release of one of our first MenuTrends Keynote Reports. The sandwich landscape has changed much since then (for one, those catchy “$5 footlong” Subway commercials were forever altered last year when the price went up a dollar), and Datassential has been on top of it all. We’ve covered new sandwich LTOs (have you seen Arby’s Meat Mountain sandwich with eight types of meat?) in issues of On the Menu, as well as insights on how sandwiches are menued internationally in International Concepts: Sandwiches. Now we’re diving back into sandwiches in our latest 2017 Sandwiches Keynote Report that’s full of data from over 1,000 consumers, along with purchasing behaviors and insights from nearly 400 operators.

Whether it’s a regional variety such as po’ boy or a new spin on the childhood favorite PB&J sandwich, we’re covering it all in our Keynote Report, which examines all the elements of a sandwich (from condiments to cheeses and carriers) and breaks down trending ingredients as well as consumer preferences. See how sandwiches can be the perfect vehicle for leveraging a number of industry trends – from customization (over a third of consumers choose sandwiches over other foods because of the ability to personalize) to growing interest in healthy, better-for-you ingredients (think all-natural meats, plant-based proteins, sprouted grain bread).

In this issue of FoodBytes, we’re giving you a sneak peek into our latest Keynote Report, highlighting opportunities for both foodservice sandwich operators, as well as manufacturers and retailers looking to capitalize on the portable, convenient handheld.

For more information or to purchase the 2017 Sandwiches Keynote Report, call Brian Darr at 312-655-0594 or email brian@datassential.com.

Globally-inspired sandwiches like bao and tortas have gained traction with U.S. consumers, as have cemitas, a type of torta originating from Puebla, Mexico that ranked highest in a list of global sandwiches (46% of consumers want to try it). Chicago’s Cemitas Pueblas offers several varieties of the cemita such as the Atomica (top) with carne enchilada, milanesa, and jamon on a sesame seed roll layered with avocado, chipotle sauce, and Oaxacan cheese. Mendocino Farms Sandwich Market, with several locations across California, switches up the menu with Chef’s Picks like the Short Rib Sunday Supper Trencher (middle), with local horseradish ricotta and Mendo Krispies (crispy bits of buttermilk batter). Hashtagged with #MendoGoesTopless on Facebook, the chain went on to explain on its blog that trenchers were the original open-face sandwich from Medieval times. For a fresh twist on turkey, Washington, D.C.-based Taylor Gourmet Sandwiches offers condiments like lemon-tahini spread and roasted red pepper salad on its Father Tavlarides sandwich (bottom).
Biscuits aren’t just for breakfast anymore – outside of the daypart, biscuit sandwiches are trending, growing 99% on menus since 2012. A number of biscuit-centric operators exist, many stepping outside of breakfast and leveraging the consumer-favorite all day.

IN THE REPORT
Discover other growing sandwich varieties, ingredients, and flavors like telera rolls, manchego, and more.

Grilled cheese sandwiches are a consumer favorite, ranking highest on the list of sandwich varieties people love. Close behind are other classics such as subs, chicken sandwiches, and Philly Cheesesteaks. Consumers also love at-home classics, like peanut butter and jelly sandwiches, about as much as those typically offered in foodservice.

IN THE REPORT
Learn more about consumer preferences when it comes to sandwiches, along with behaviors, like the times of day sandwiches are most often bought.

IN THE REPORT
Discover the premium ingredients consumers are interested in, from premium meats and cheeses to plant-based proteins.

Not sure whether consumers would pay a premium for breads that leverage better-for-you ingredients? A number of health halo buzzwords like natural and whole grain are resonating with consumers.

SANDWICH INGREDIENTS AT EVERY MAC TREND STAGE

Looking for a way to include more trending ingredients in your sandwich lineup? Look to our research for information on everything from tartines to savory jams.

IN THE REPORT
See more sandwich ingredients and varieties at every stage of Datassential’s Menu Adoption Cycle (MAC).

SPROUTED GRAIN
INCEPTION

PICKLED TOPPINGS
ADOPTION

PREMIUM MEAT
PROLIFERATION

BIG SANDWICH BUILDS
UBIQUITY

BISCUITS GALORE

The Elmer with pulled pork, coleslaw, and fried onions at Denver Biscuit Co.

DATASSENTIAL’S FOODYTES: 2017 SANDWICHES KEYNOTE REPORT SNEAK PEEK
+393%

GROWTH OF BANH MI ON MENUS OVER THE PAST FOUR YEARS

DATASENTIAL 2017 SANDWICHES KEYNOTE REPORT

More on banh mi in On the Menu: June 2016
**CONSUMERS SOUND OFF ON BREAKFAST SANDWICH WANTS**

“I enjoy breakfast sandwiches, but can’t think of anything ‘new.’ Eggs and bacon or sausage on biscuits or croissants are a go-to. I would like a biscuits and gravy option, which I haven’t seen. A sandwich that has hash browns as a patty would be good.”

**IN THE REPORT**

Breakfast sandwiches are on the rise as an easy, portable way to fill up in the morning. See what other innovations consumers want when it comes to breakfast sandwiches and learn about consumer interest in varieties like french toast sandwiches or croque madames.

**WHAT PART OF A SANDWICH IS MOST IMPORTANT?**

We asked consumers to think back to their favorite sandwich. What was it they loved most about the sandwich? Was it the type of bread, quality of meats, or condiments like mustard or mayo? Here’s what consumers said:

- **47%**
  - ALL COMPONENTS ARE EQUALLY IMPORTANT

- **20%**
  - THE PROTEIN

- **12%**
  - THE CHEESE

- **9%**
  - THE BREAD

**IN THE REPORT**

Dive into specific sandwich ingredients and flavors that consumers like most, from condiments to carriers. Zero in on how to create the best sandwich offerings for your business.

**44% OF CONSUMERS LOVE TOAST**

What are consumers’ favorite types of breads or sandwich carriers? How can you leverage your inventory to play off of currently trending breakfast carriers? To appeal to the 44% of consumers that love toast, consider offering sandwiches served on toasted bread, a small change that gives consumers more of what they like.

**IN THE REPORT**

Uncover other small sandwich menu tweaks that could pay off big, from adding more better-for-you options to offering pickled veggies.
Boomers are more likely than younger generations to have a cold cut sandwich as their last sandwich.

Parents are much more likely to eat sandwiches on the go.

Sandwiches are the most commonly found item on K-12 menus, with 97% penetration *(MenuTrends Keynote Report: Kids’ Menus).*

**SANDWICHES ACROSS GENERATIONS**
What sandwich trends are operators most interested in? Is it plant-based condiments or healthier alternatives to ubiquitous white bread and sub rolls? With trends moving quicker every day, look to our sandwich report to find out how to stay on top of what operators are looking for.

IN THE REPORT
Uncover more operator findings, such as innovations they may look to manufacturers for, along with insights surrounding operator preferences and wants when it comes to sandwich ingredients and purchasing.

OPERATORS SAY
“With the growth of consumers’ desires to remain healthy, I’d like to see tofu as a cutting-edge protein used in sandwiches. Other ingredients like muenster cheese, truffle aioli, and smoked whole muscle meats can also be innovators.”

IN THE REPORT
Find out what operators are looking for when it comes to sandwich ingredients, from premium meats to types of cheese and preferred formats for condiments (scratch-made vs. ready-to-use).

IN THE REPORT
See more packaging opportunities such as rip-away packaging that allows consumers to eat sandwiches even when their hands are dirty, or reusable silicon sandwich pouches like Kinderville’s (left).

PACKAGING INNOVATIONS
Revamp your sandwich packaging to cater to a variety of consumers, many of which look to sandwiches as a convenient, on-the-go meal. Consider creative packaging that caters to kids, like the monster-inspired sandwich packaging below that allows for easy visibility of sandwich fillings (designed by Brazilian design firm Quadrante Brasil).

71% OF OPERATORS SAY THEY WOULD PAY MORE FOR PREMIUM DELI MEATS
Most operators are purchasing deli meats to be sliced fresh in-house, and with the growth of consumer interest in foods made using healthier, better-for-you ingredients, operators are also looking to manufacturers for products that will resonate with consumers, even if it means shelling out a bit more.

71% OF SANDWICHES PURCHASED AWAY FROM HOME WERE EATEN ON THE GO

2/3 OF SANDWICHES PURCHASED AWAY FROM HOME WERE EATEN ON THE GO

80% OF SANDWICHES WAVER AWAY FROM HOME WERE EATEN ON THE GO

DATASENTIAL’S FOODYTES: 2017 SANDWICHES KEYNOTE REPORT SNEAK PEEK
WHAT YOU MISSED IN LAST MONTH'S TRENDSPOTTING

DINE AROUND
In our May issue of Dine Around, we took you to Seattle, WA, a city full of cutting-edge restaurants featuring everything from fresh-caught seafood to Japanese comfort food and unique cocktails.
IN JULY: Miami, FL

ON THE MENU
It was all about adding unique flavor and colorful hues in last month’s On the Menu featuring ingredients like saffron, bagels, zhug hot sauce, and more.
IN JULY: We cover trends ranging from honeycomb and plantains to dosas and non-traditional jerky.

INTERNATIONAL CONCEPTS
Last month we explored the world of burgers, traveling to burger-centric restaurant chains serving up global renditions of the consumer favorite, piling on ingredients like beets or chutney.
IN JULY: Chile

FOODBYTES
Last month’s FoodBytes took you inside our Keynote Report: Food @Home, with the latest data and research surrounding restaurant delivery, third-party services like GrubHub, and meal kit subscription services.
IN JULY: A deeper look at meal kits.

CREATIVE CONCEPTS
Last month Datassential bought you the first of several retail-focused issues of Creative Concepts. We dove into how snacking has evolved, looking at everything from alternative chips to kid-friendly cheese snacks.
IN JULY: Amusement Parks

For information about an issue or to subscribe to a title, contact Datassential Business Development Manager Susan Cohen at 312-219-6428 or susan.cohen@datassential.com
Every issue of Datassential’s Trendspotting reports, searchable and ready to download in SNAP!

SNAP ON!
The Sandwiches Keynote combines the opinions and behaviors of over 1,000 consumers with the insights of hundreds of operators from Datassential’s OPERA™ panel, the industry’s largest with over 30,000 restaurant, retail, and onsite operators.

We cover the sandwich landscape in both retail and foodservice, diving deep into consumer and operator habits, perceptions, and preferences regarding sandwich varieties, components, and accompaniments. You'll learn more about...

**Sandwich Consumption**
In addition to the attitudes, trends, and tastes that Keynotes always cover, we asked consumers to describe their last sandwich occasion in detail. Discover which sandwiches and ingredients are the most common at home and away, when and where they are usually eaten, and what they are paired with.

**Sandwich Attitudes**
Learn how sandwiches fit into consumers’ lifestyles, compare what consumers say they are looking for in sandwiches at home versus away from home, and gauge purchase intent by foodservice segment. Using data from Datassential’s new FLAVOR database, explore favorite sandwich varieties and affinity for individual components including carriers, cheeses, proteins, toppings, and condiments.

**Operator Perspectives**
Uncover how foodservice operators view sandwiches, their biggest operational challenges, and what changes are planned for sandwich menus. Also, learn how supermarkets and c-stores differ in their approaches compared to other segments.

**Restaurant Menus**
Identify the most commonly menued sandwich varieties, components, and descriptors, as well as which are fastest growing.

**Retail Opportunities**
Learn how new products are reflecting sandwich trends and see how they could impact your business.

MenuTrends Keynote Reports are priced at $6,500 per topic. Package pricing is available with the purchase of multiple topics.

For questions or to purchase the report, please contact Brian Darr
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Eating at home today means much more than just cooking from scratch or ordering takeout or delivery. In addition to covering those classic restaurant offerings, Datassential’s Foodservice @Home Keynote explores third-party delivery services like Grubhub, on-demand facilitators such as UberEATS, and subscription meal services like Blue Apron that bring fresh ingredients straight to customers’ kitchens.

We surveyed over 3,000 consumers to provide you with the most comprehensive look at the changing landscape of Foodservice @Home. You’ll learn about …

The Foodservice @Home Consumer
The majority of consumers order pick-up or delivery from restaurants with some regularity. Uncover who is most likely to order from restaurants; understand consumer motivations, barriers, and frustrations with ordering restaurant food to be eaten at home.

Restaurant Delivery and Pickup
Walk through each stage of the delivery/pickup process from the consumer’s perspective. Gain a better understanding of preferred ordering methods, expectations when receiving food, and how food is handled once it arrives.

Meal Subscription Services
Dive into the emerging and highly visible world of meal kit delivery. Find out what attracts consumers to subscription services, the extent to which they compete with traditional grocery and foodservice, and see retention rates for all major meal program providers.

Innovations and Opportunities
Identify what’s next for Foodservice @Home, from delivery drones and cooking robots to voice-recognition ordering and live feeds of food preparation.

Opportunity is knocking with Datassential’s Foodservice @Home Keynote

Topical Keynote Reports are priced at $6,500 per topic. Package pricing is available with the purchase of multiple topics.