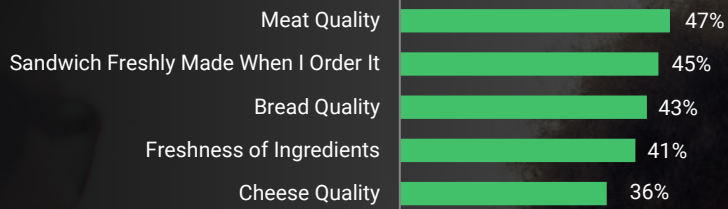
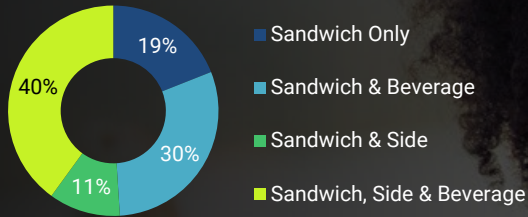


Consumer Drivers

Thinking about the following factors, please select which you consider an important indicator of the overall quality of a sandwich. (Top 5 Shown)



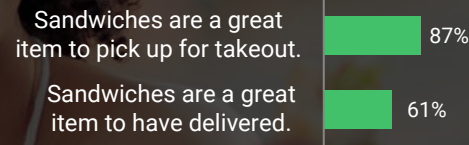
When you purchase a sandwich, do you typically buy...?



How important are each of the following in deciding where to purchase a sandwich? (Top-2 box; extremely important/important)



Thinking only about sandwiches purchased away-from-home, please indicate your level of agreement with the following statements (Top-2 box; % agreeing)

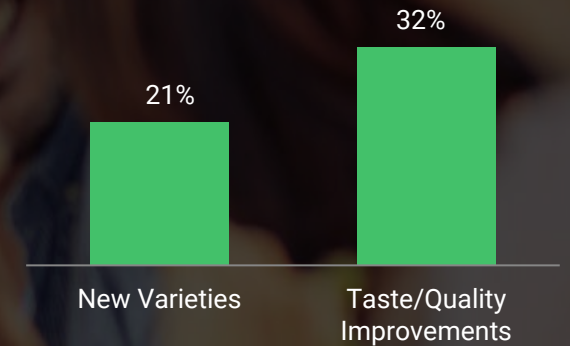


KEY INSIGHTS: Operators have a number of avenues to position around quality and potential price increases. Sandwiches wield power in increasing check averages beyond an à la carte purchase. Venue selection and delivery experience are also central factors.

Base: All respondents (500)
Source: Foodservice IP Consumer Survey Dec. 2023

Operator Perspectives

If you had the opportunity to make one improvement to your overall sandwich/handheld item offerings, what would you choose? (Top-2 box)



KEY INSIGHTS: Operator interest in elevating their sandwich programs presents opportunity for a broad range of suppliers.

Source: FSIP Operator Survey

FSIP'S TAKE:

The market for sandwiches and other handhelds in the away-from-home channel is expected to grow over the next three years, driven by consumers' ever-increasing desire for portability/convenience. A diverse range of operators are competing in the space and introducing new offerings in response to these evolving consumer preferences. At the same time, they are navigating higher costs, labor challenges, and expectations for fast service, customization and more. These dynamics bring diverse implications for suppliers – and opportunities.