

REPORT

NEW CHEESESTEAKS
CHOOSE YOUR SIZE: 6" | FL | FLPRO®

	\$	\$	\$
	480	980	1190 cal

1 THE PHILLY
Steak, peppers, onions, 2x provolone cheese, mayonnaise, toasted

	\$	\$	\$
	440	880	1120 cal

2 THE OUTLAW™
Steak, peppers, onions, 2x Pepper Jack cheese, Baja Chipotle, toasted

	\$	\$	\$
	540	1080	1470 cal

3 THE MONSTER™
Steak, peppers, onions, 2x Monterey Cheddar cheese, bacon, Peppercorn Ranch, toasted

NEW ITALIANOS
CHOOSE YOUR SIZE: 6" | FL | FLPRO®

	\$	\$	\$
	500	1000	1440 cal

4 SUPREME MEATS
Pepperoni, salami, capicola, ham, provolone cheese, lettuce, tomatoes, onions, banana peppers, MVP Parmesan Vinaigrette®

	\$	\$	\$
	420	840	1030 cal

5 BELLA MOZZA
Capicola, ham, BelGioioso® fresh mozzarella, spinach, tomatoes, onions, banana peppers, MVP Parmesan Vinaigrette®

	\$	\$	\$
	580	1160	1810 cal

6 THE BOSS
Pepperoni, meatballs with marinara, BelGioioso® fresh mozzarella, Parmesan cheese, toasted

NEW CHICKEN
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	\$	\$	\$
	500	1000	1190 cal

7 THE MEXICALI
Rotisserie-style chicken, 2x Pepper Jack cheese, smashed avocado, lettuce, tomatoes, onions, Baja Chipotle, toasted

	\$	\$	\$
	470	940	1290 cal

8 THE GREAT GARLIC™
Rotisserie-style chicken, provolone cheese, bacon, lettuce, tomatoes, onions, Roasted Garlic Aioli, toasted

	\$	\$	\$
	440	880	1070 cal

9 THE CHAMP™
Rotisserie-style chicken, peppers, onions, 2x Monterey Cheddar cheese, Peppercorn Ranch, toasted

Breakfast 
Recommended on flatbread.

	6"	FL	
Ham, egg & cheese	490 980 cal	\$	\$
Steak, egg & cheese	520 1040 cal	\$	\$
Bacon, egg & cheese	530 1060 cal	\$	\$
Egg & cheese	450 900 cal	\$	\$

Healthy prepared in front of you.

Breakfast combo*
Includes a 6" breakfast sub with a \$

*Excludes Steak, Egg & Cheese.

How Subway Optimized Their Menuboard To Achieve Soaring Sales

How Subway Optimized Their Menuboard To Achieve Soaring Sales

By Tom Cook and Howland Blackiston, Co-Principals of King-Casey

Subway ended 2021 with U.S. sales exceeding projections by nearly \$1.4 billion and its highest annual average unit volume since 2014. Their record breaking sales are continuing in 2022, and the following is why.

In addition to introducing a new menu of 12 sandwiches with preset ingredients, and a new way of ordering by name and number, Subway followed a proven, data and insights driven approach to improve their menuboard communications.

So, how did Subway optimize their menuboard communications so effectively, and what can we learn from them?

This report reveals the steps they followed to get enviable results from their menuboard communications.

The Optimization of Subway's Menuboard Communications Followed a Comprehensive, Proven Approach

Menu Strategy (Business Objectives)

The first step is to develop the **Menu Strategy**. This document identifies and prioritizes Subway desired business objectives as related to the food and beverage products offered.

Menuboard Architecture (Organization and Layout)

The next step is to develop the **Menuboard Architecture**. This uses schematic form to illustrate the organization, layout, product placement, space allocation and key communications.

Menuboard Design & Validation (Copy and Graphics)

The final step is to develop and validate the **Menuboard Design**. The design includes treatment of copy, photography, typography, graphics, branding, colors, dimensions, hardware, etc. The validation uses a quantitative consumer survey.

The Menu Strategy Framework Involves Establishing Business Objectives, Defining Strategies to Achieve the Business Objectives, And Prioritizing Menu Categories and Products



These are the business objectives we want to achieve from the Subway menu are:

The major ways we'll achieve our business objectives are:

The menu categories and product priorities to achieve our business objectives are:

Step 1: Develop a High-Level Menu Strategy

The process started with a 2-day strategic planning workshop at Subway's headquarters. The objectives were as follows:

- To obtain management's vision, insights, strengths and weaknesses regarding Subway's current and future menu strategies and menuboard communications.
- To utilize the vision and insights from the workshop to develop and publish a menuboard communications strategy that would lead to the development of an optimized menuboard architecture and design.
- To develop a range of preliminary menuboard architecture layouts that would guide the development of several menuboard strategies that would first be evaluated using quantitative consumer surveys. And with the "winning" strategy to be tested in actual store environments.

Top Management Gets Involved

The workshop included a cross-functional team that included Subway's Chief Operating Officer, Chief Marketing Officer, President of North America, SVP Marketing Strategy & Planning, Sr. Director of Consumer & Product Insights, SVP Operations, SVP Market Operations, VP Business Intelligence & Analytics, Global Learning & Development, and three outside consultants.

Establishing Business Objectives

The team established the critical business objectives for the optimized menuboard communications. It was against these objectives that the new menuboard communications would be measured. The new menuboard communications must...

- Increase check
- Improve ease and speed of navigation
- Bring the food to life
- Prioritize Categories and Menu Items. Not all menu categories and individual menu items are of equal importance. Some are more profitable than

others. Some sell better than others. Some are signature to the brand. Some are critical to achieving the new business objectives. Considering these realities, the team prioritized menu categories and items to guide the organization and architecture of the new menuboard.

Benchmarking the Competition

Competitive and best-practice menuboard were selected for benchmarking. The team studied and evaluated these observing how the menuboard was segmented, allocated space, organized, use of imagery, the number of items listed, ease of ordering, pricing strategies, etc.

Assessing Subways Menubaord Communications

The team then turned their attention to their own menuboard, discussing strengths and weaknesses, and identifying specific opportunities for improvement (what are the tactics that will allow Subway to realize the business objectives for their optimized menuboard communications).

Step 2: Develop Alternative Menuboard Architecture

On the last day of workshop, the team came up with eight alternative strategies for Subway’s new menuboard communications. By the end of the day, the group had developed wireframe schematic layouts for several of the most promising strategies to be consumer validated. The schematics serve as a “blueprint” for how the optimized menuboard communications could be organized to achieve the business objectives established during Subway’s menu strategy workshop.

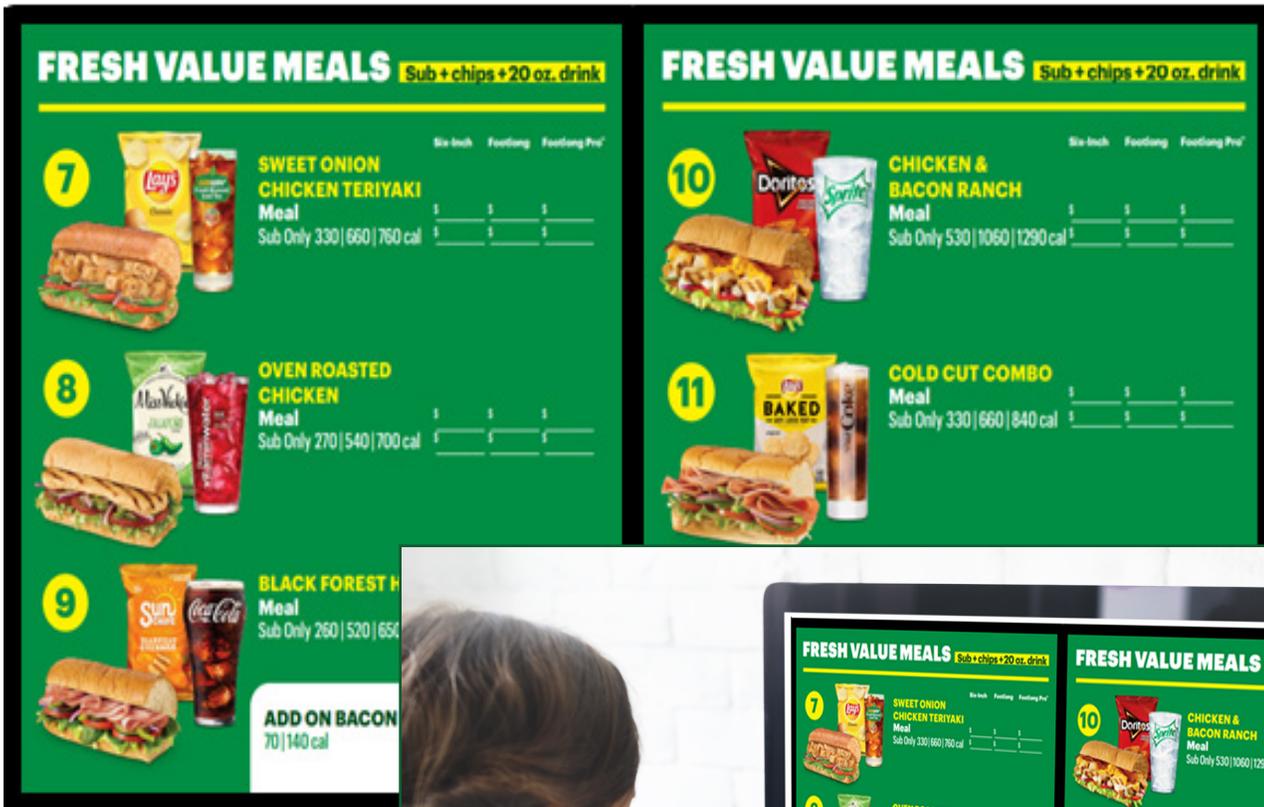
(BELOW) The development of alternative wireframe schematics (architecture layouts) visually illustrated how the menuboard communication should be organized to achieve the desired business objectives.



Step 3: Menuboard Design and Consumer Validation

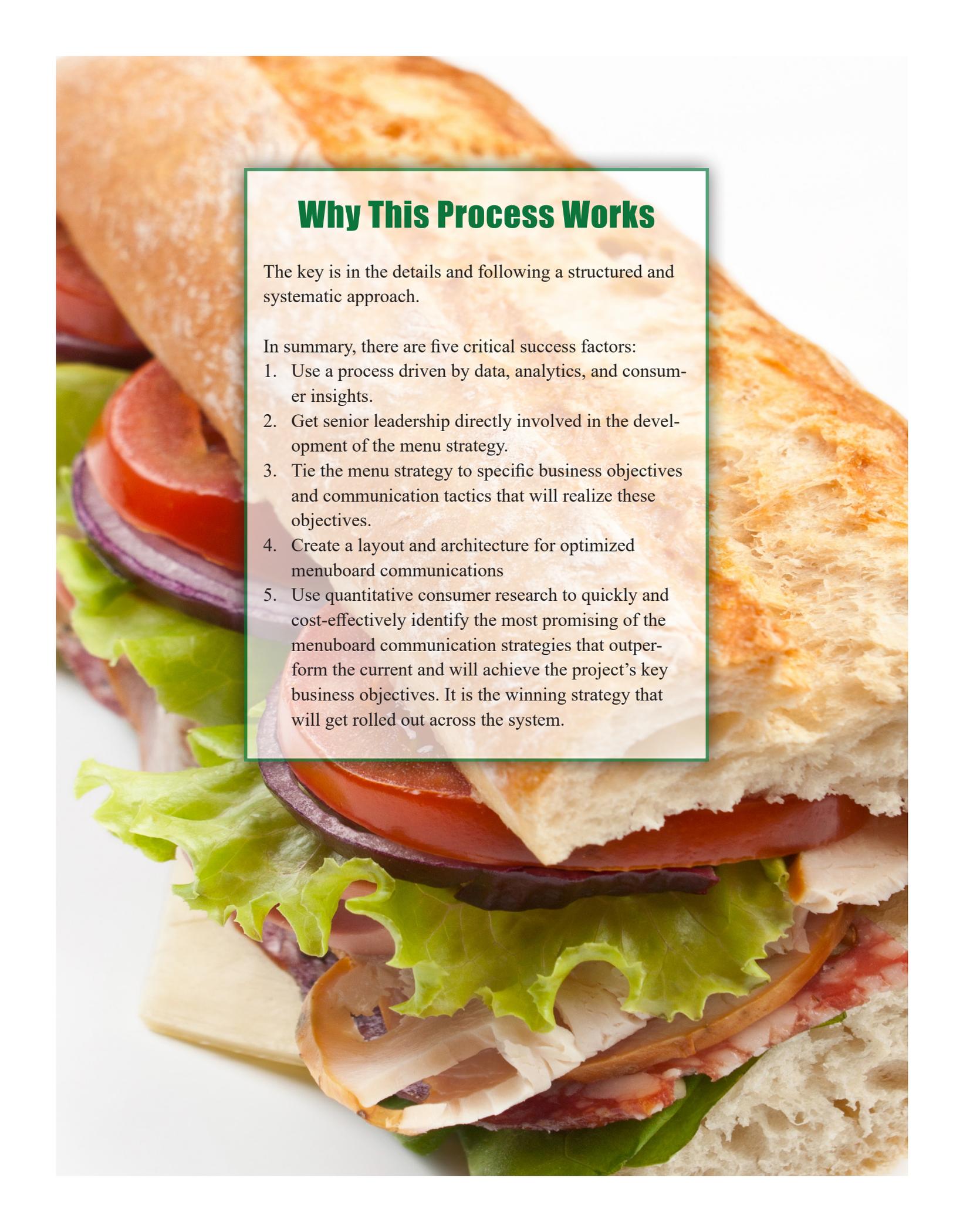
Following the workshop schematic layouts were developed into color renderings visually illustrating each of the new menuboard communication strategies. These were then put into a quantitative consumer sur-

vey to assess the validity of the new menuboard communications strategies, and to identify which outperform the current. The survey tracked and compared elapsed order times, check average, products ordered, consumer attitudes, as well as other parameters important to the Subway team. The winning strategies were then refined and finalized, and tested in stores before selecting the strongest for rollout.



The most promising schematics were developed into color visual renderings (ABOVE) and then consumer tested using an online survey (RIGHT) to identify the strategies that outperform the current menuboard and achieve the desired business objectives.





Why This Process Works

The key is in the details and following a structured and systematic approach.

In summary, there are five critical success factors:

1. Use a process driven by data, analytics, and consumer insights.
2. Get senior leadership directly involved in the development of the menu strategy.
3. Tie the menu strategy to specific business objectives and communication tactics that will realize these objectives.
4. Create a layout and architecture for optimized menuboard communications
5. Use quantitative consumer research to quickly and cost-effectively identify the most promising of the menuboard communication strategies that outperform the current and will achieve the project's key business objectives. It is the winning strategy that will get rolled out across the system.

KING-CASEY IS THE FIRM THAT THE WORLD'S LEADING RESTAURANT AND FOODSERVICE BRANDS COME TO WHEN THEY WANT RESULTS

King-Casey provides practical, analytics-driven insights and research-validated solutions for restaurant and foodservice brands. We are renowned as the leader in providing comprehensive, turn-key Menu Optimization Services that increase sales, profitability and the customer experience.

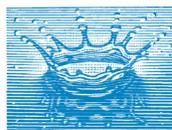
Collectively, our services provide advanced solutions that enable our clients to unlock the full potential of their menu, and achieve significant, measurable business results. No other firm provides such comprehensive menu optimization analytics and solutions.

King-Casey's Suite of Services Include

- Consumer insights analytics
- Attitude and usage research
- TURF research and analysis (optimal item assortment)
- Price research and optimization
- Menu performance analysis
- Menu operations analysis
- Menu architecture and reengineering
- Menu strategy
- Menu communications and design (web, mobile app, menuboards)
- Menu design testing and roll-out
- Total store communications (path-to-purchase)

The Benefits Are Immediate and Meaningful

- Increased sales and profitability
- Improved customer experience
- Totally integrated solutions
- No loss or dilution of insights and data due to their transfer from one consulting resource to the next
- Cost and time savings from having the full suite of services under one umbrella



KING·CASEY



BRAND·RETAIL INNOVATORS

25 Sylvan Road South, Suite H, Westport, Connecticut 06880 USA. Telephone: +1.203.571.1776

www.king-casey.com