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## The humble sambo is still the midday meal of choice

**W**hen you think about lunch, what food comes to mind? For most people, a sandwich would come close to the top of the list. Whether salad, chicken or something more exotic, the humble sambo is the midday meal of choice for everyone from hungry schoolchildren to office workers eating at their desks.

Nowhere is this truer than in Britain, where sandwiches are the number one choice in food-to-go (FTG) category, bought by more than 54 percent of the population each year.

“There’s nothing that comes close to them in terms of popularity,” said Jim Winship, Chief Executive Officer of the British Sandwich and Food-to-Go Association.

Pre-packed sandwich sales make up almost a quarter of the UK’s £24.3 billion (\$43.2 billion) food-to-go industry and are increasing at a rate of around 4.2 per cent a year according to data from international consumer insights firm Kantar Worldpanel.

At C-store level, they account for around 20 per cent of food-to-go sales (Association of Convenience Stores 2017 Local Shop Report). Clearly, Australia has a lot to learn when it comes to serving up our sambos. So where are we going wrong?

### FRESH AND EASY

With 70 per cent of purchasing decisions made in store, UK C-store retailers know that boosting food-to-go is the key to improving basket size and customer spend.

“The FTG mission plays a vital role within the convenience channel, in fact 15 per cent of all shoppers within convenience are on a FTG mission,” said Val Kirillovs, Research and Insights Director at shopper research and insights company HIM.

As the number one FTG item, ensuring C-stores have the best range of sandwiches to hand for when hunger pangs strike is a top

priority for retailers, and they are prepared to spend big to make it happen. Last year, C-store operators invested more than £858 million in their stores, a third of which was spent on refrigeration.

Not surprisingly, freshness is their greatest concern, particularly given that, as in Australia, convenience stores are often considered the last port of call for fresh food.

“Traditionally, UK symbol groups have been less trusted on their fresh food than the bigger supermarkets, so demonstrating freshness is paramount,” said Andy Hill, Group Insights Director for Samworth Brothers, which supplies branded (under the Ginsters label) and own-brand sandwiches, food-to-go and in-home ready meals to some of the UK’s biggest retailers, convenience stores and petrol forecourts.

Taking food-to-go seriously however doesn’t just end with decent refrigeration. It also means keeping chillers clean, rotating stock regularly, checking to make sure nothing is spoiled and ensuring any deals are clearly labelled. “People only have a very limited time for lunch, so fixtures needs to be easy, simple and quick to navigate,” said Hill. “They want to find their meal deal, to pay and just get out.”

### BRAND POWER

In today’s cost-conscious world, it’s often tempting to opt for a cheaper sandwich in a meal deal and leave it to the branded chips and drinks alongside to do the selling.

But the days when shoppers were happy with a bit of limp lettuce and soggy tomato between two slices of white bread are long gone, and today’s consumers expect the same level of quality from their sandwiches as they do from the rest of their meals.

In fact, HIM research shows that 33 per cent of food-to-go shoppers believe that having branded sandwiches in a food to go offering is important. This is no surprise to Hill, who said that

the most important thing shoppers are looking for at lunchtime is reliability, and they look to brands for trust and reassurance.

“People want something that will taste good and fill them up until evening,” he said. “For many people, lunch is the highlight of their day; it’s a little bit of me-time and they tend to be less adventurous. Brands are an important part of this – if they see the same brand in different places, they learn to trust the brand and look out for it.”

## BRING ON THE BASICS

Trends and innovation will always have a place in food-to-go, but when it comes to what people want from a pre-packed sandwich, it seems very little changes.

In fact, according to Kantar Worldpanel, only five fillings make up three quarters of the UK’s sandwich purchases: chicken, cheese, bacon, egg and ham.

This is good news for C-stores, allowing them to focus on a smaller but more popular range and add in variety through different breads or twists on existing flavours.

“We find that people want variety, but not the expense of their favourites,” says Hill.

One trend that isn’t going away is the swing towards ‘healthier’ options, with 39 per cent of FTG shoppers in convenience considering healthy options to be important.

Vegan and vegetarian options are on the rise and gluten-free products are still popular, even among those who aren’t gluten-free for medical reasons. Meanwhile, bread varieties and alternatives are increasing all the time. Retail giant Marks & Spencer launched bread enriched with vitamin D in 2015, and you only have to look to your local supermarket to see the number of rustic loaves, flatbreads and wraps that have sprung up as an alternative to the traditional white bread triangles.

But Hill warns retailers against becoming too enamoured with trends. “Vegans still only make up a small percentage of consumers and while many people are looking to cut down on bread during the week, it’s still popular,” he said. “People want health – but only as long as it doesn’t compromise on taste, price or convenience.”

## AROUND THE CLOCK

Australia has long known about the stomach-warming satisfaction of a breakfast bacon and egg roll and it seems that UK convenience stores are finally catching on. Breakfast is the now the biggest growth occasion within FTG, and, as the popularity of this Aussie classic demonstrates, sandwiches have an important role to play.

This year, for the first time, The British Sandwich Industry Awards, known as ‘The Sammies’, awarded Best New Sandwich to a ‘Breakfast Toast’ featuring black pudding, goat’s cheese, cheddar and bacon on sourdough toast, and Hall says breakfast FTG products are an equally big growth area for Samworth Brothers.

“It’s much less about the traditional 12-2pm lunch hour. Now you see people buying FTG at all times of day,” he says.

There’s another benefit for C-stores too – studies have shown that retailers investing in a hot FTG offering such as breakfast rolls attract a bigger basket size and spend on average, with 33 per cent of shoppers also buying sandwiches and 30 per cent splashing out on soft drinks.

## MEAL DEAL MAGIC

Meal deals are a traditional staple of lunchtime food offers; popular with customers looking for a bargain and with retailers as a surefire way of driving footfall and encouraging the sales of more premium products such as soft drinks and snacks.

Not surprisingly, they’re also one of the main reasons shoppers visit FTH outlets, with him! research showing 20 per cent of FTG shoppers are looking for such offers.

In the UK, the £3 (\$5.30) meal deal is the gold standard of British lunch offers and is still offered by many of the big grocery chains including Sainsbury’s and Tesco.

Yet it’s the meals by competitors such as Marks & Spencer and pharmacy giant Boots, both of which retail for between £3-£4, that are often considered better value by shoppers, suggesting that price is not the only deciding factor. “When prices are forced up, it generally doesn’t have a massive impact on sales,” says Jim Winship.

This is supported by data from him!, which indicates that while price is important, brand, variety and quality and a perceived ‘value for money’ – are equally crucial.

For retailers, this means thinking beyond the traditional chips and soft drink to include a wider range of options in meal deals, particularly healthy alternatives, even if it means increasing prices. It also means ensuring basics such as sandwiches are of the same calibre as the rest of the meal. “Meal deals continue to be a staple within any UK convenience store FTG offering, but demand for diversity is growing,” says Kirillovs. “Shoppers want a wider range, healthier options and better quality, and retailers that tailor their offering are setting themselves up for growth.” **C&I**



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## LESSONS FROM LONDON

- 70 per cent of purchasing decisions are made in store, meaning that sandwiches and FTG play a crucial role in boosting customer spend
- Brands are important, both for sandwiches and other meal deal items
- Consider including a range of hot and chilled, fresh and packaged items in meal deals – lack of choice was one of the key complaints from customers
- Customers are on the look out for health, but not at the expense of flavour
- Lowest prices are not always the answer – shoppers see quality and value for money as being equally important