

Q1 2019

QSR Spotlight: Sandwich Category is On a Roll

alphonso 
The TV Data Company

No Baloney: Tough to Unseat a Market Leader



Two giants control national TV SOV in the sandwich category

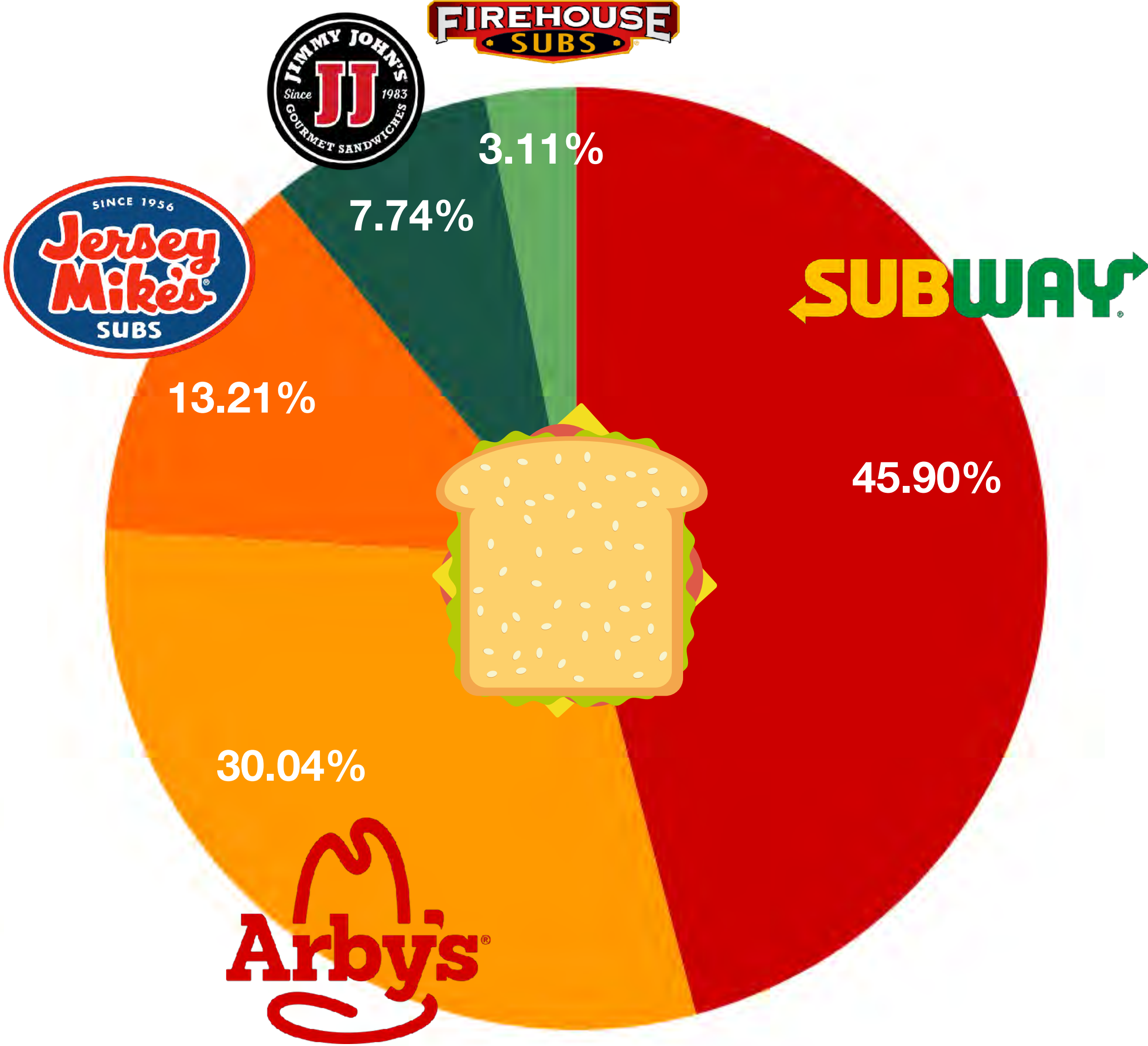


However, several emerging brands looking to spend more "bread" on the national TV scene

The Spread: Q1 2019 National TV Ad Spend for Sandwich Chains

Two Giants and a Few Upstarts Battle for SOV

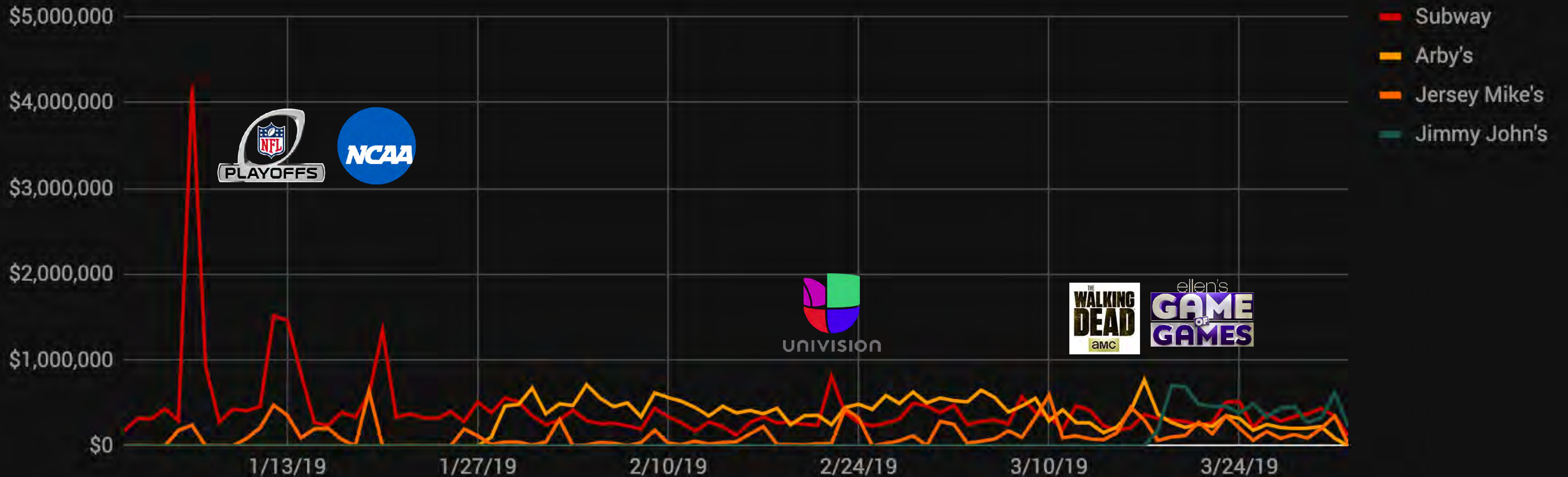
Over 75% of national TV spend in the category (\$84.8M) coming from the top two sandwich chains



Source: Alphonso Insights, Q1 2019











How it Stacked Up: Multiple Brands, Multiple Strategies
























Subway owned January with heavy investment in the NFL and NCAA Basketball Playoffs. Arby's held out until late January, and led the category in SOV for most of February. Jersey Mike's and Jimmy John's were more tactical, with the latter waiting until mid-March to make a big splash on Ellen's Game of Games and other signature programs



Sports and Big Reach Cable on the Menu

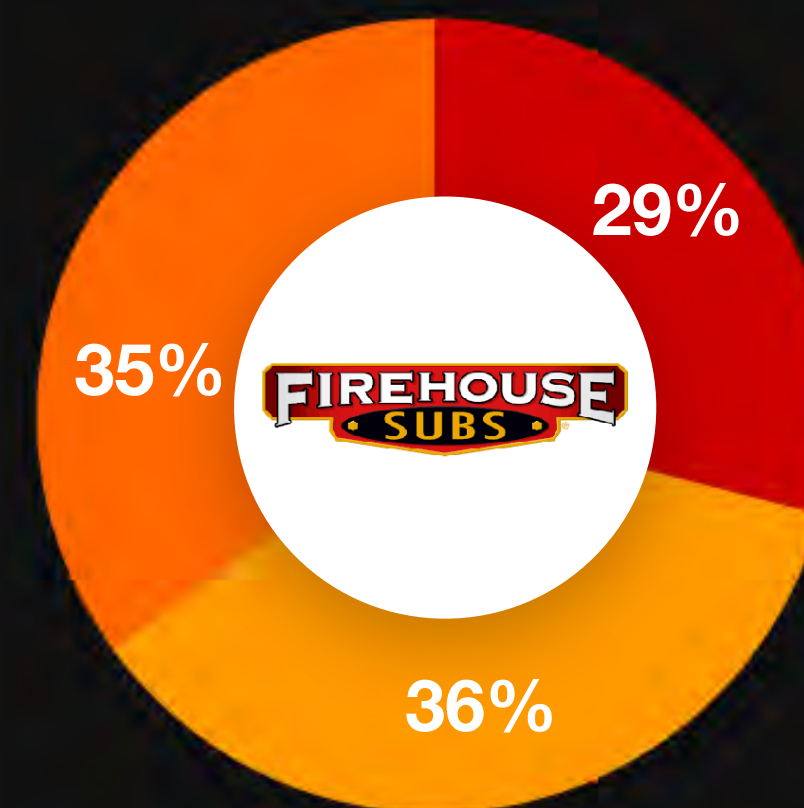
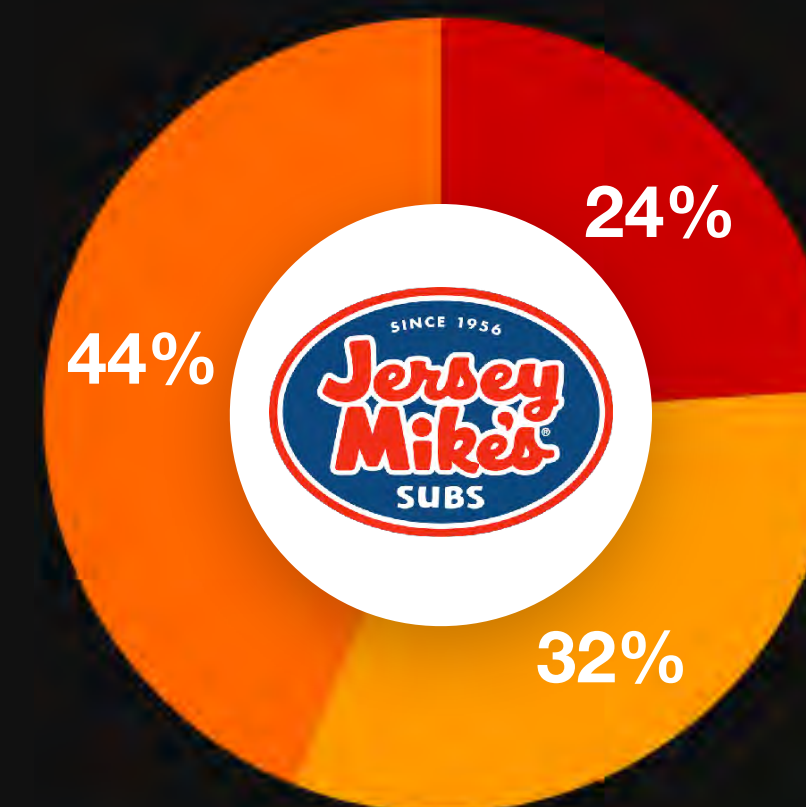
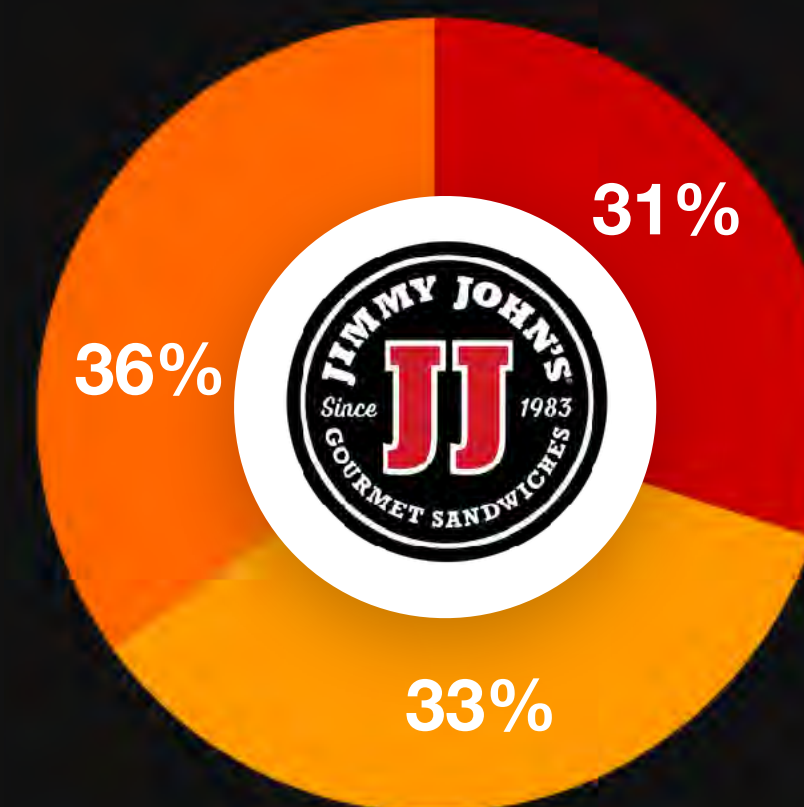
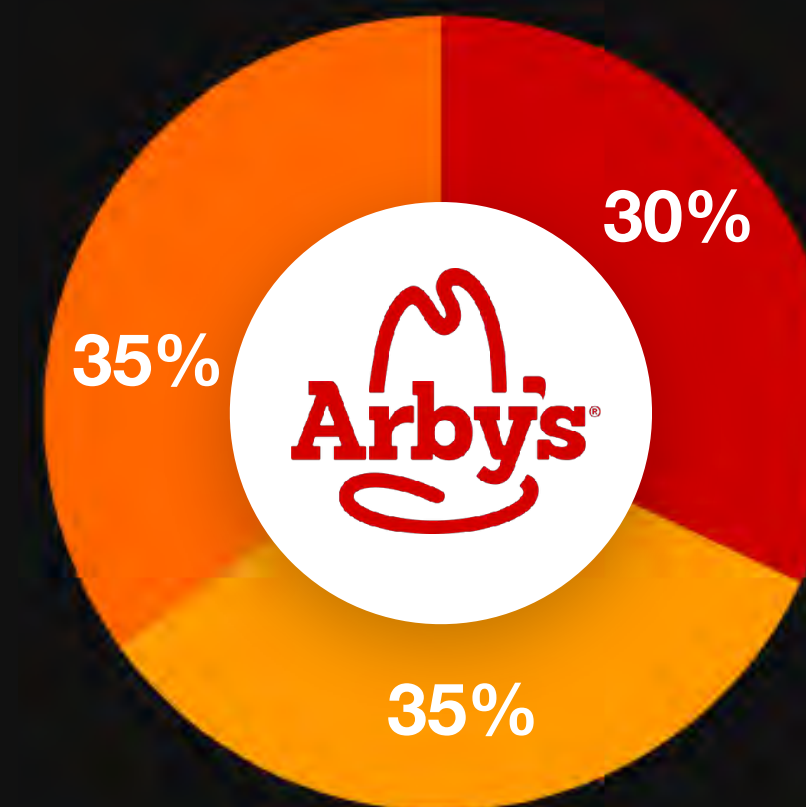
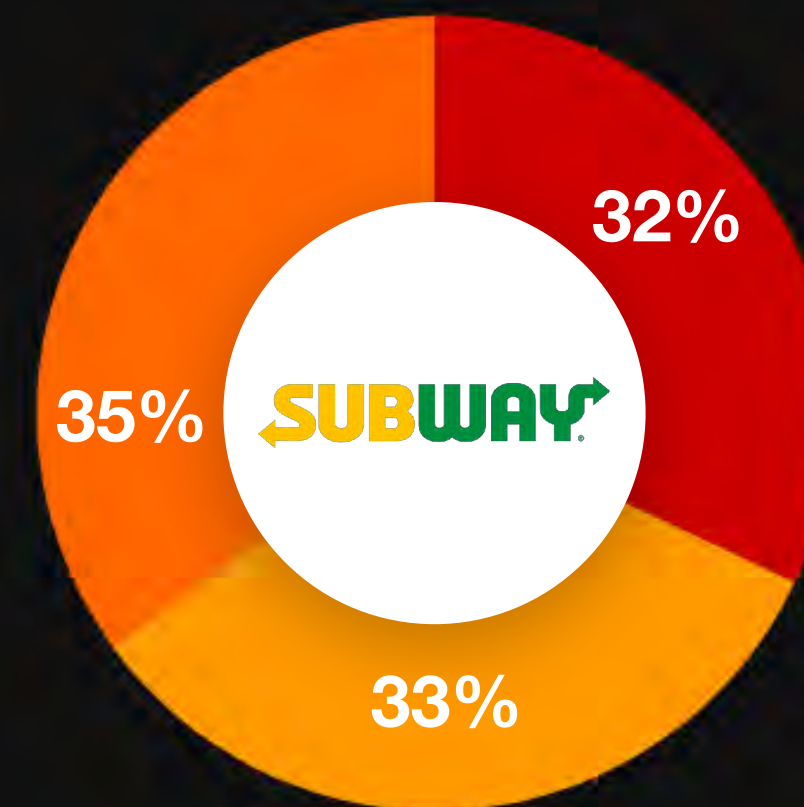
NFL Playoffs, NCAA Basketball Playoffs, and other high impact sporting events drove TV investment among leading sandwich chains

Top Networks by TV Ad Spend, National Sandwich Chains, Q1 2019	Spend
	\$9.6M
	\$8.5M
	\$6.1M
	\$6.0M
	\$5.3M
	\$3.2M
	\$3.1M
	\$2.8M
	\$2.7M
	\$2.3M

Top Shows by TV Ad Spend, National Sandwich Chains, Q1 2019	Network	Spend
College Basketball	   	\$8.4M
NFL Football	  	\$8.0M
SportsCenter	 	\$2.2M
NBA Basketball	  	\$2.1M
Law & Order: Special Victims Unit	 	\$2.1M
2019 NCAA Basketball Tournament	  	\$1.4M
Impractical Jokers		\$1.0M
Ridiculousness		\$1.0M
The Big Bang Theory	 	\$1.0M
The Office	 	\$0.9M





While Jersey Mike's skewed older, the rest of the category went broad



- 18-34
- 35-54
- 50+

Source: Alphonso Insights, Q1 2019

Creative Samples






"Happy Place"

SPEND
\$9.9M

AIRINGS
2887

VIEWABILITY
92.2%

"Not a Mistake"

SPEND
\$6.4M

AIRINGS
3324

VIEWABILITY
93.7%




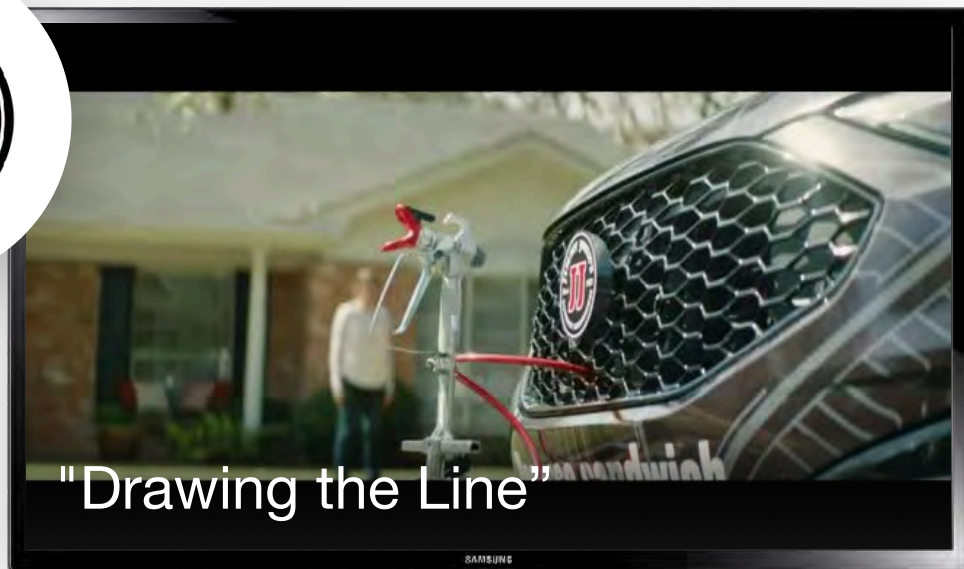


"Living Room: Uber Eats"

SPEND
\$3.1M

AIRINGS
1134

VIEWABILITY
93.7%


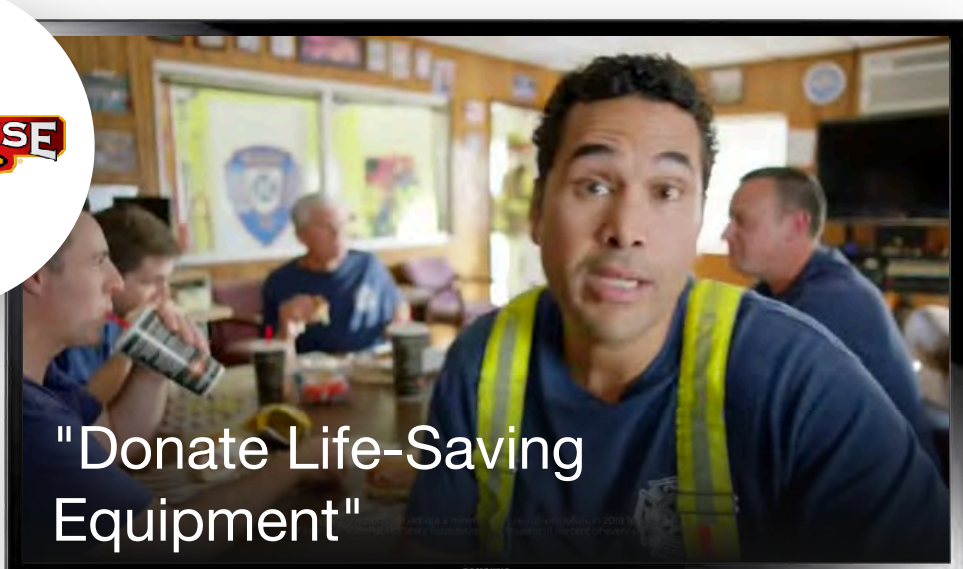




"Drawing the Line"

SPEND
\$3.9M

AIRINGS
958

VIEWABILITY
93.4%

"Donate Life-Saving Equipment"

SPEND
\$2.6M

AIRINGS
721

VIEWABILITY
93.4%



About Alphonso

Alphonso is a TV data and measurement company, and the market leader in providing brands and agencies with real-time TV ad campaign measurement, closed-loop attribution for TV ads, and TV audience extension across digital devices. Its Alphonso TV Data Cloud services are used by hundreds of the Fortune 500 brands and agencies in the U.S.

With video AI technology embedded in tens of millions of smart TVs, TV chipsets, set-top boxes and other connected devices, Alphonso understands what programming and advertising people watch on TV. Its SaaS offering, Alphonso Insights, delivers actionable TV measurement and closed-loop attribution with offline data in real time, to help brands understand the true impact of TV advertising. To learn more, visit www.alphonso.tv.

