

Good Morning

A Proven Platform to Build Your
Breakfast Business

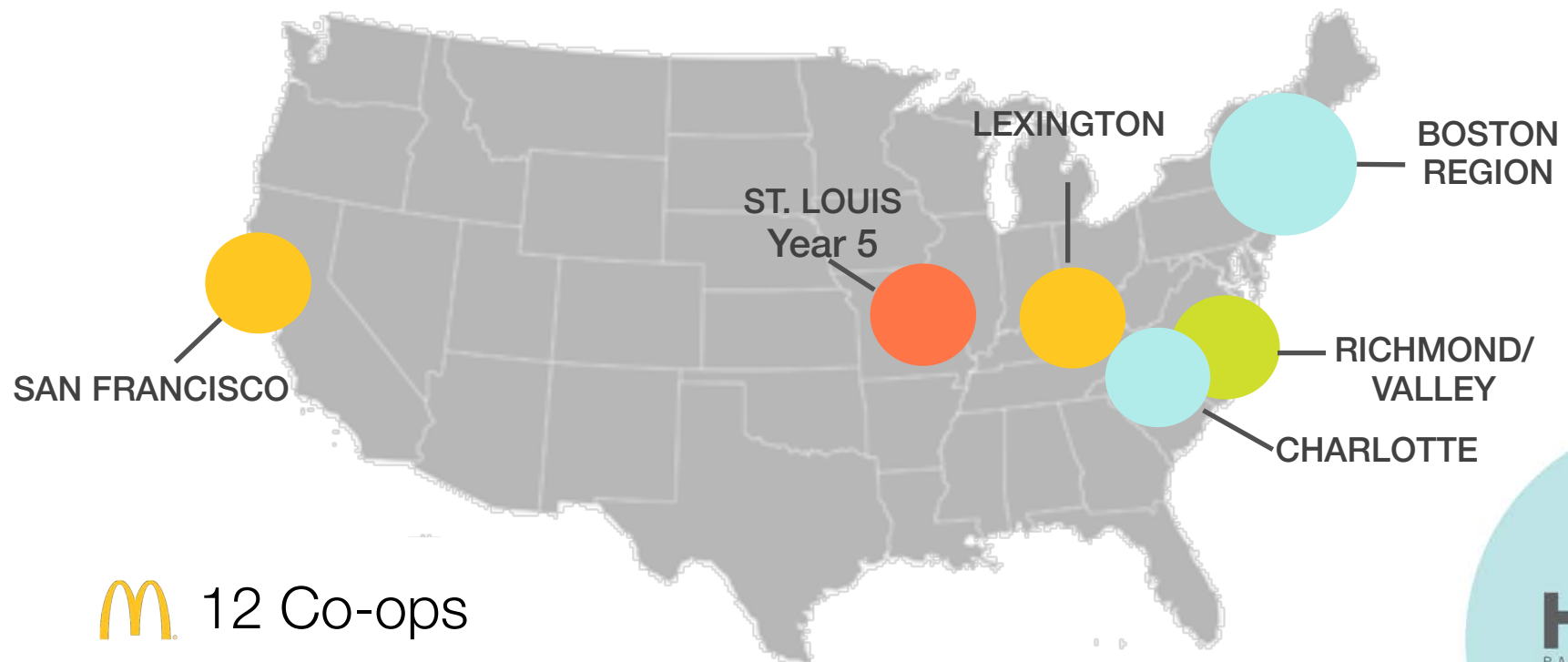


“Good Morning” Set Up

- H&L not looking to sell or broker the campaign to you
- H&L to partner with the Region, Co-ops and agencies as a resource to implement the campaign



Good Morning Campaign



12 Co-ops



1,250+ Restaurants







The Surprise – 50+ commercials



Media



Social/PR



Restaurant



PERMISSION

People are welcoming our brand



Why does the campaign work?



We are a fun local brand. Let's act like it

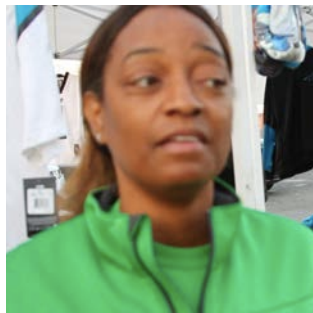
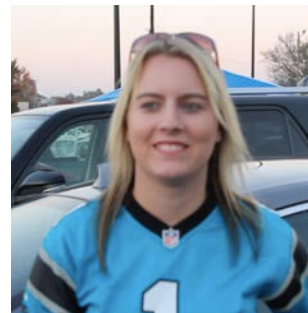
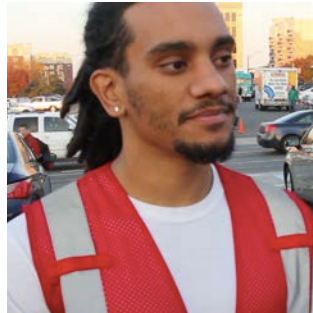
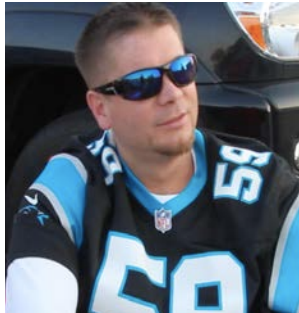
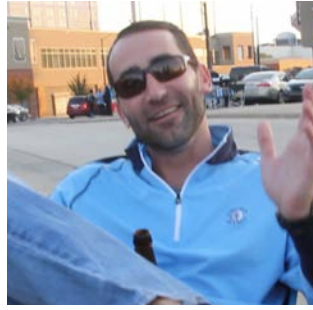
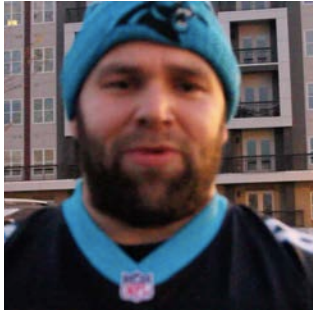
- Builds a connection with the consumer around a simple idea “We want you to have a Good Morning”
- Real
- Fun – It makes you smile and want to watch
- Local – Global brand in your neighborhood
- Flexible – Promotion, new product, etc.
- The crew gets it, likes it and is proud of it



Why it will work in the Region



CHARLOTTE CONSUMER BREAKFAST INSIGHTS



COMMON THEMES

They like us but don't "connect" with the brand

We win on convenience

Lack of connection

Definite affinity for hometown favorite

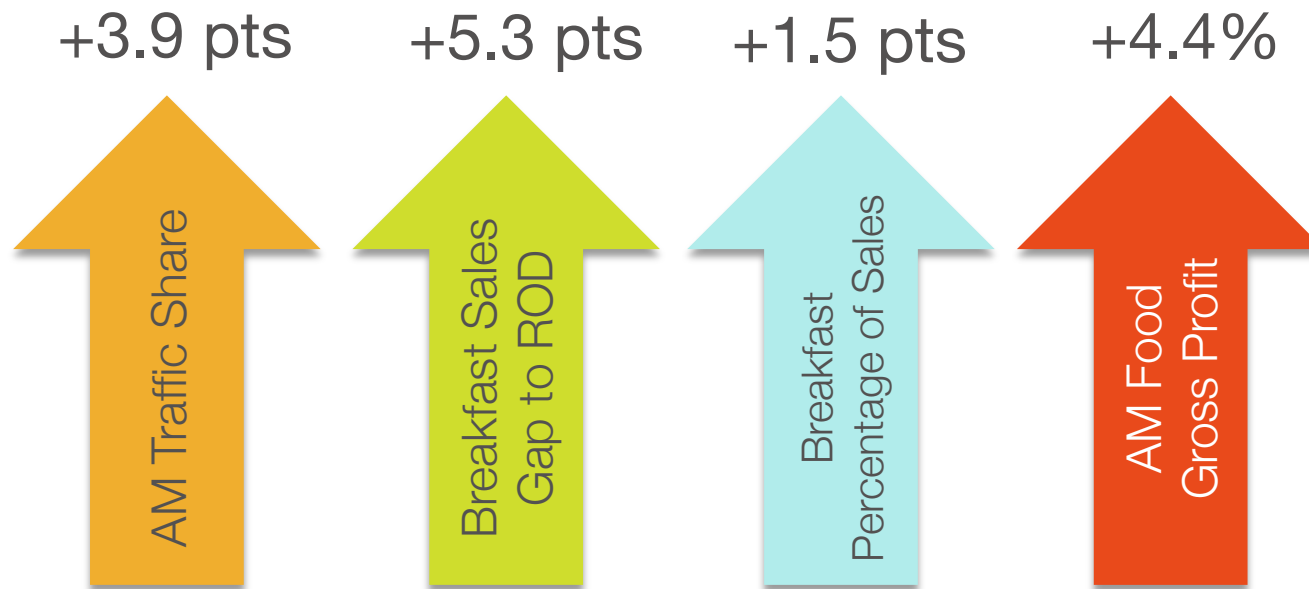


Results



RESULTS

St. Louis – Results first 2 years





NEW ENGLAND – LOW BREAKFAST SHARE

Dunkin' owns New England



AM TRAFFIC SHARE
6:1 vs. McD



RESULTS

Boston

+7.6%

Coffee Sales

+3.9%

AM Food
Gross Profit

+5.0 pts

Breakfast Sales
Gap to ROD

+1.5 pts

AM Market Share



AM Market Share

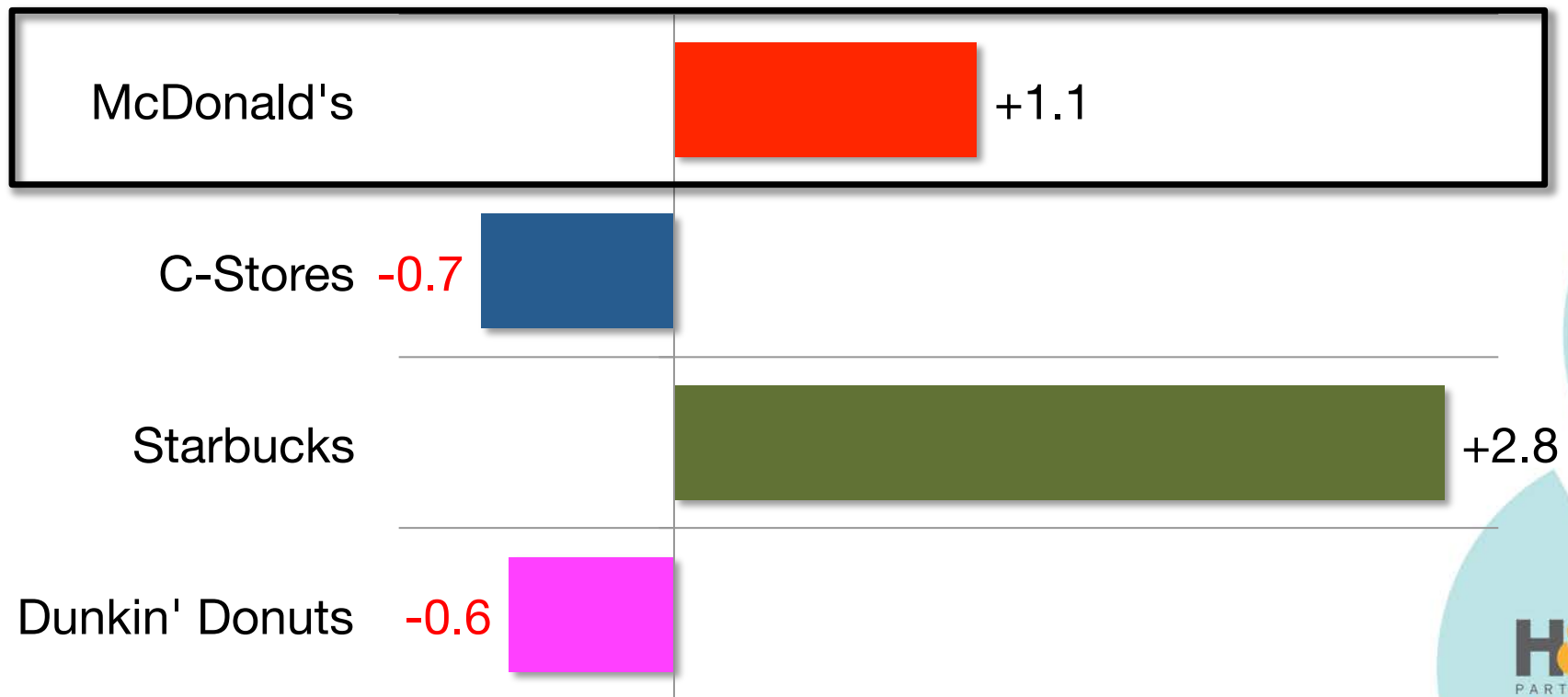
-1.8 pts



Year 1 results 2015

Continue to steal share from Dunkin' in Boston

QSR Morning Meal Traffic Share – New England – YTD August 2016 vs YA



Source: NPD Market Insights

Getting started



Good Morning: Getting Started

1. Commit to owning “Good Morning”
2. Allocate resource to fit your budget and needs
3. Crew Talent Search
4. Select commercial locations & film or use existing footage and localize
5. Engage the crew
6. Launch the campaign (PR/Social/Media)
7. Maintain crew & consumer engagement



Good Morning: H&L Support

H&L to provide the following to your agency

- Previously produced commercial examples and scripts
- All necessary created artwork files
- Provide training & support sessions
- Manage necessary rights (i.e. music)



Why Good Morning?

- Fun, real and engaging at all levels (3 Cs)
- Localizes our global brand
- Lives beyond the TV or Radio
- Proven successful against strong local competitors
- Flexible to communicate any message or offer
- Long term investment



Thank you for considering

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