

Survey of Downtown Calgary Donairs

February 2015

Section 1: Survey Summary

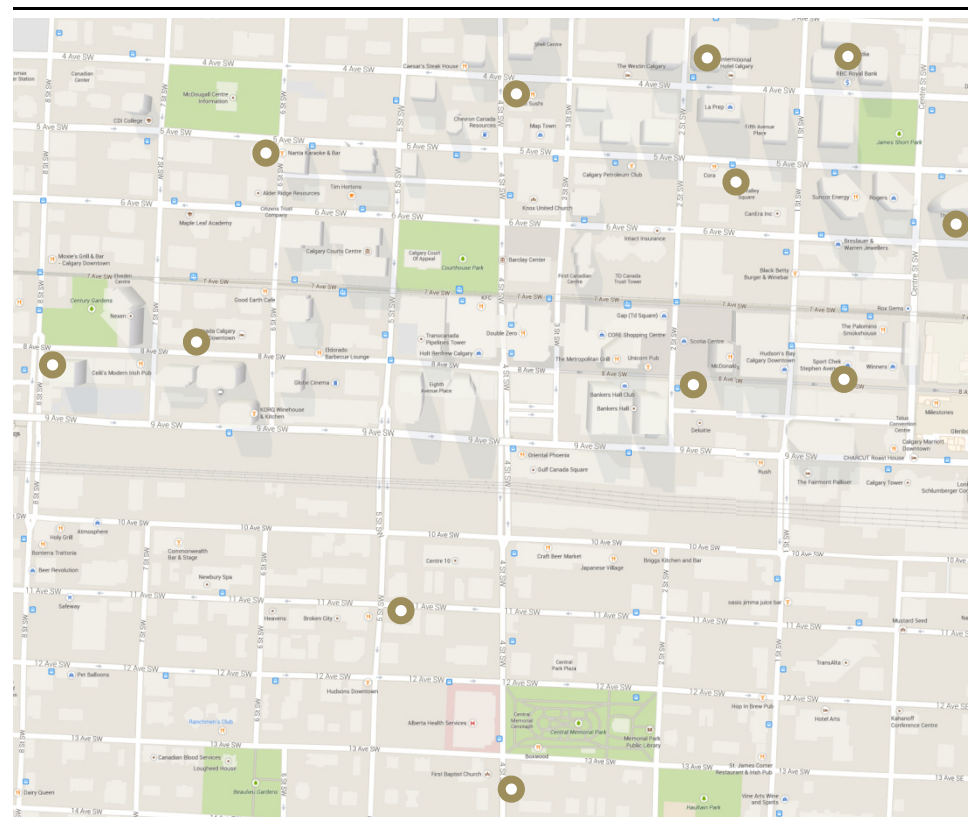
Section 1	Survey Summary
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Survey Overview

OVERVIEW

<p>Purpose</p>	<ul style="list-style-type: none"> To conduct an exhaustive survey of Calgary's Mediterranean cuisine and find the best donair in downtown Calgary
<p>Universe</p>	<ul style="list-style-type: none"> Beef donairs were sampled from 12 different vendors Beef shawarma, beef gyro and other derivatives of the standard Turkish-style beef donair were omitted from the study⁽¹⁾
<p>Evaluation</p>	<ul style="list-style-type: none"> Donairs were evaluated based three primary criteria: <ul style="list-style-type: none"> Qualitative measures ("Quality")⁽²⁾ Mass ("Quantity")⁽³⁾ Mass of meat as a percent of total mass ("Meatiness")⁽³⁾ Donairs were ranked within each of the three criteria and a weighting was applied to each ranking to create an overall rating ("Composite")
<p>Other details</p>	<ul style="list-style-type: none"> The Quality ratings were determined by consensus from the three participating individuals For consistency, all measures of mass and the recording of price were carried out for the largest donair offered by the vendor
<p>Timing</p>	<ul style="list-style-type: none"> The study was conducted over the span of four weeks Both lunch and dinner donairs were permitted

AREA COVERED



 Donair locations

TIMELINE



Source: Google Maps

- Note that A La Saj's Syrian-style donair was also included in the survey.
- Quality measure was calculated as a weighted average of the following 5 factors, ranked as either nil, 1/4, 1/2, 3/4 or 4/4 (respective weights are in parenthesis): 1. Meat (30%), 2. Groceries / Vegetables (20%), 3. Sauce (20%), 4. Pita (20%), 5. Customer Service (10%).
- In all measures of mass, the measurements were taken with a Cuisinart KS-55C scale and measured in grams.

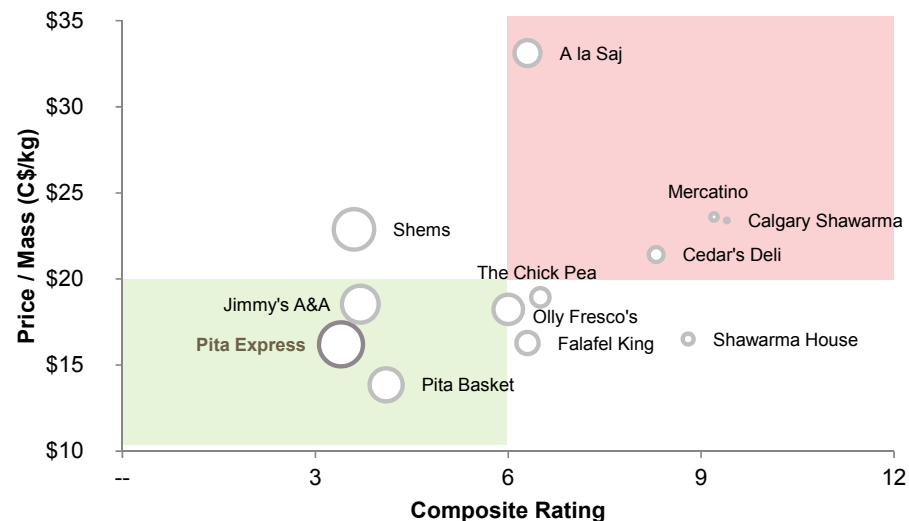
Survey Results

COMPOSITE WEIGHTED RATING

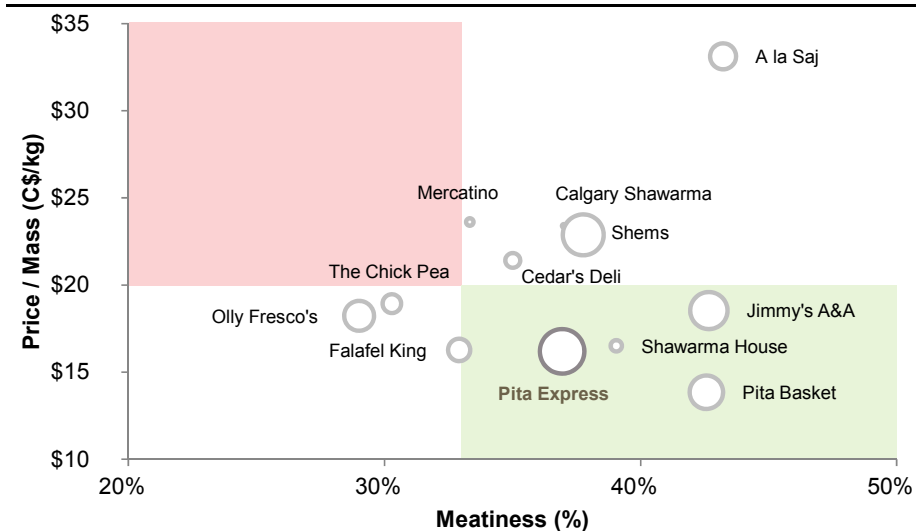
Donair	Primary Criteria				Composite	
	Price / Mass (C\$ / kg)	Quality (Rank)	Quantity (Rank)	Meatiness (Rank)	Composite (Score)	Rank (Rank)
Pita Express	\$16.20	1	7	7	3.4	#1
Shems	\$22.88	2	9	5	3.6	#2
Jimmy's A&A	\$18.53	5	1	2	3.7	#3
Pita Basket	\$13.85	5	2	3	4.1	#4
Olly Fresco's	\$18.24	3	6	12	6.0	#5
A la Saj	\$33.12	8	12	1	6.3	#6
Falafel King	\$16.28	5	3	10	6.3	#7
The Chick Pea	\$18.93	4	8	11	6.5	#8
Cedar's Deli	\$21.42	9	5	8	8.3	#9
Shawarma House	\$16.51	12	4	4	8.8	#10
Mercatino	\$23.61	9	11	9	9.2	#11
Calgary Shawarma	\$23.40	11	10	6	9.4	#12

Base Case Weighting: 60% Quality, 10% Quantity, 30% Meatiness

PRICE PER KILOGRAM TO COMPOSITE RATING⁽¹⁾



PRICE PER KILOGRAM TO MEATINESS⁽¹⁾

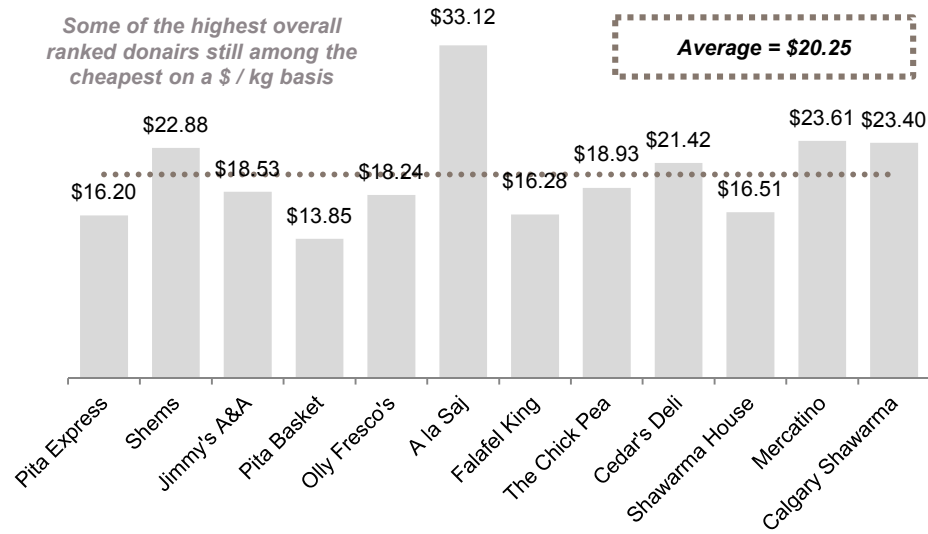


3 | Note: The size of the bubbles in the graphs corresponds to the overall rank based on the composite rating.

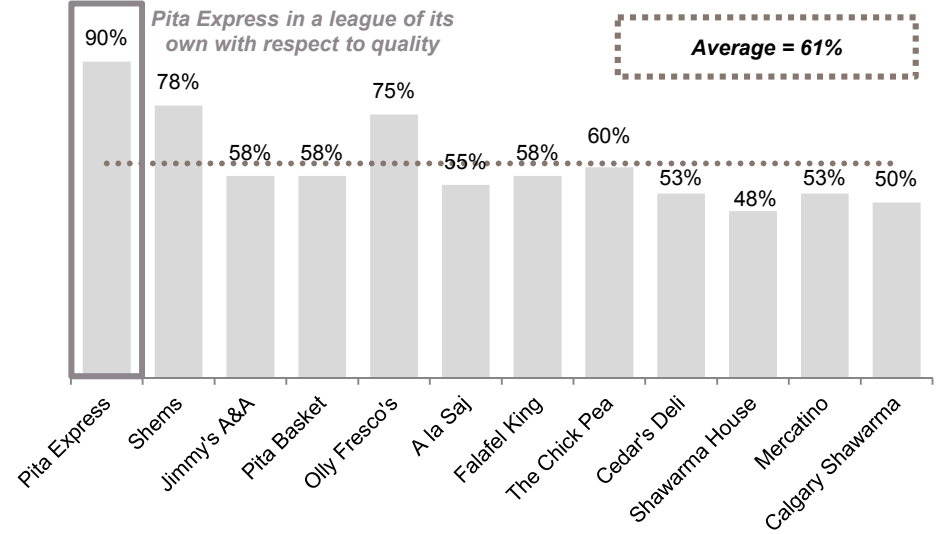
1. Prices are before tax.

Donair Comparables

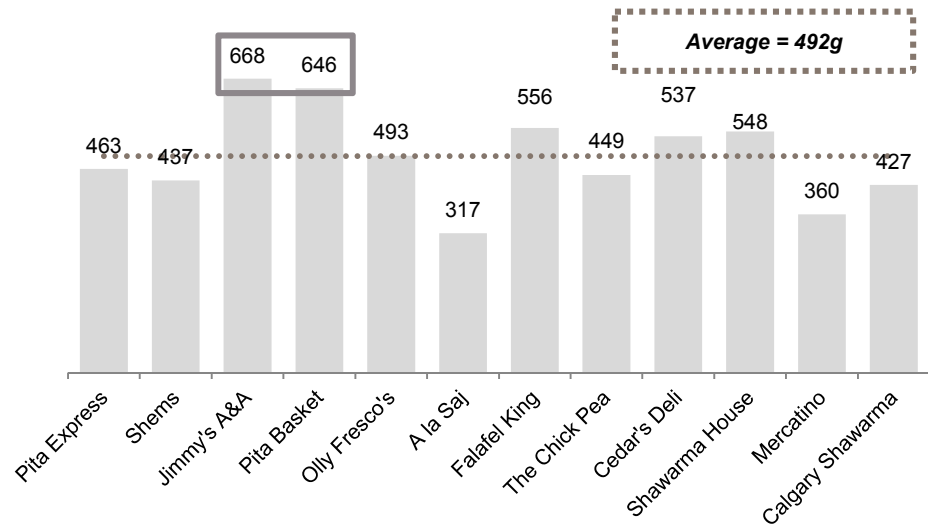
PRICE / MASS⁽¹⁾ (C\$/KG)



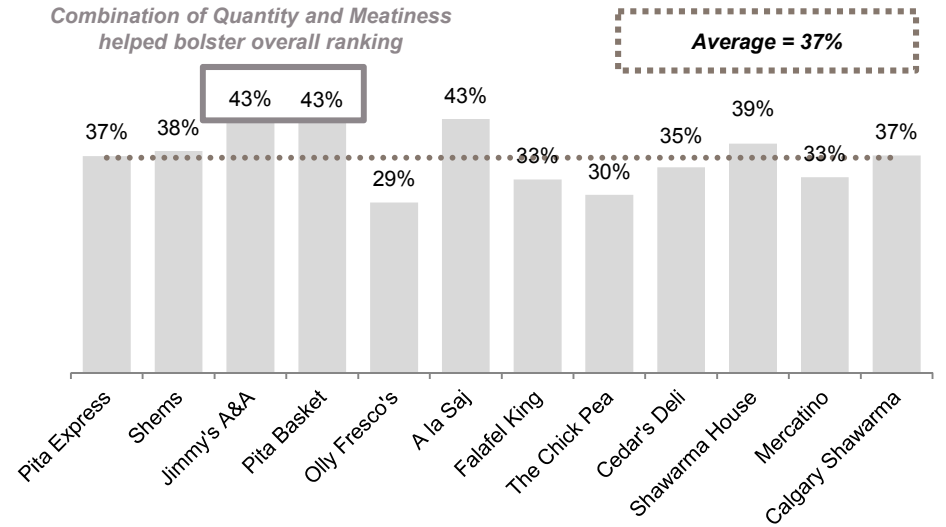
QUALITY⁽²⁾ (%)



QUANTITY (GRAMS)



MEATINESS (%)



Note: Comparables displayed in order of overall composite ranking

1. Prices are before tax.
 2. Quality measure was calculated as a weighted average of the following 5 factors, ranked as either nil, 1/4, 1/2, 3/4 or 4/4 (respective weights are in parenthesis): 1. Meat (30%), 2. Groceries / Vegetables (20%), 3. Sauce (20%), 4. Pita (20%), 5. Customer Service (10%).

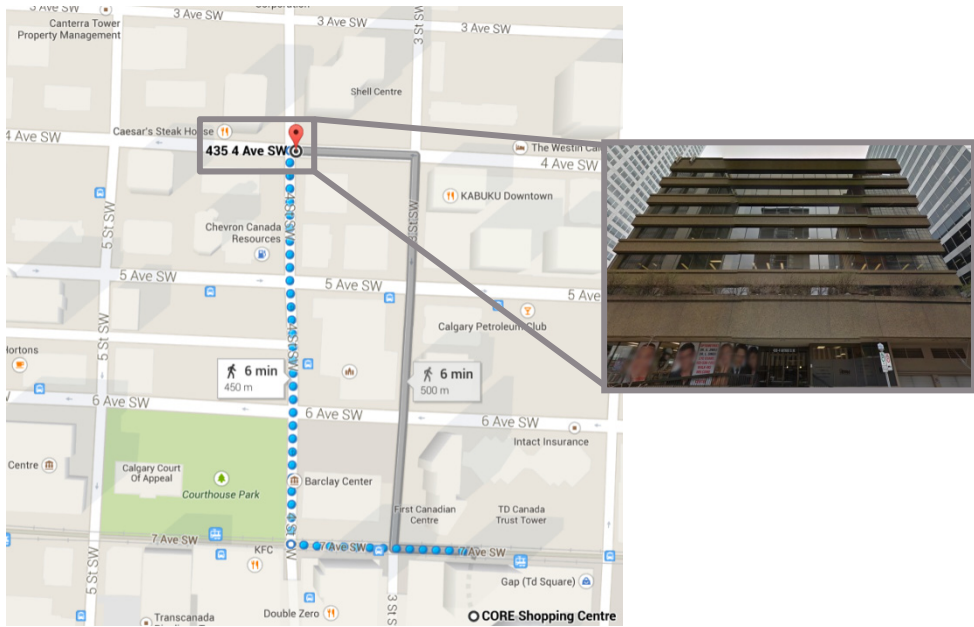
Section 2: Donair Profiles

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#1 | Pita Express

207 435 4th Avenue SW

LOCATION MAP

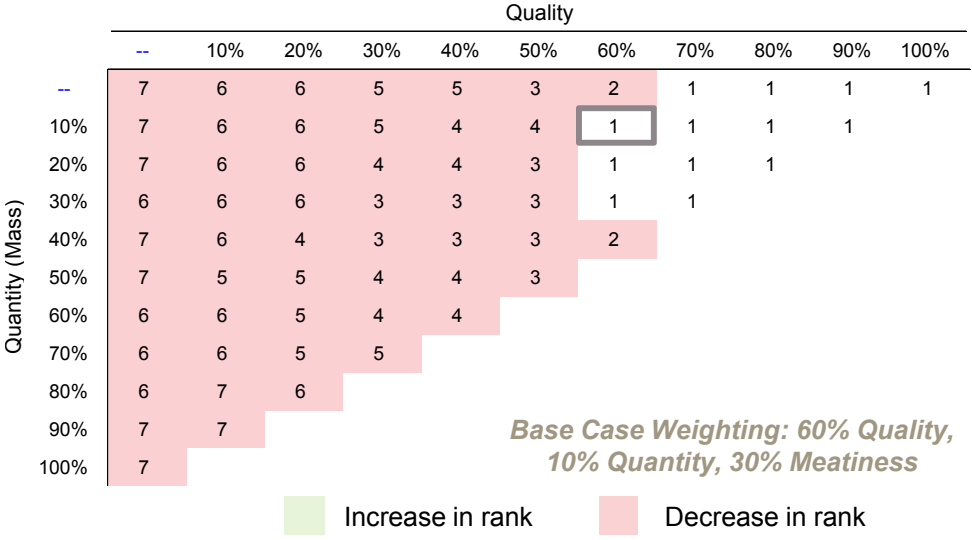


DONAIR SNAPSHOT

Key Details		Quantity Measures	
Date of Sample	03-Feb-15	Mass (g) ⁽³⁾	463
Nearest Landmark	Shell	Meat (g) ⁽³⁾	171
Distance (m) ⁽¹⁾	450	Meatiness (%)	36.9%
Weekday Hours	7:30AM-3:30PM	Value Measures	
Quality Measures		Price (Before Tax) (C\$)	\$7.50
Meat	●	Price / Mass (C\$ / kg)	\$16.20
Groceries	●	Composite Ranking	
Sauce	●	Quality Rank	1
Pita	●	Quantity (Mass) Rank	7
Customer Service	●	Meatiness Rank	7

- Outstanding customer service
 - Store owner has outstanding sense of humour
 - Offered a free baklava for first time customers
- Excellent quality of meat
- Garlic sauce outstanding; best sauce encountered in survey
- Owners recommendation is garlic sauce only, no hummus; however, hummus is fantastic
- Offered optionality of whole wheat vs. white pita
- Addition of banana peppers was a nice touch

RANKING SENSITIVITY⁽²⁾



6 | 1. Distance from The Core Shopping Centre.
 2. Note that while the third variable (Meatiness) is not shown, it is inherently implied through subtracting the two shown factors. E.g. in a scenario with a 40% weighting for both quantity and quality factors, 20% would be the implied factor for Meatiness.

#2 | Shems

230 - 140 4th Street SW

LOCATION MAP

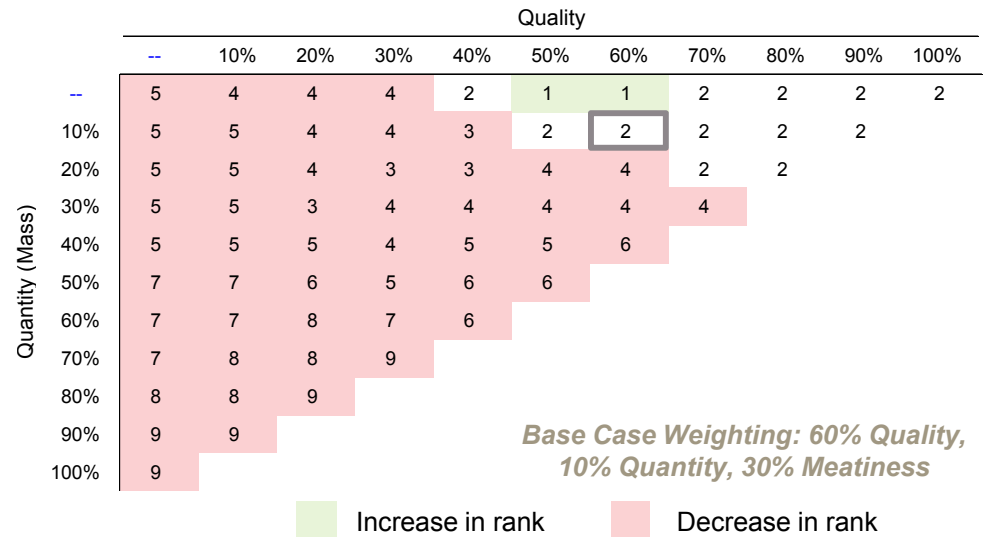


DONAIR SNAPSHOT

Key Details		Quantity Measures	
Date of Sample	18-Feb-15	Mass (g) ⁽³⁾	437
Nearest Landmark	Sun Life Plaza	Meat (g) ⁽³⁾	165
Distance (m) ⁽¹⁾	50	Meatiness (%)	37.8%
Weekday Hours	10:00AM-3:00PM	Value Measures	
Quality Measures		Price (Before Tax) (C\$)	\$10.00
Meat	●	Price / Mass (C\$ / kg)	\$22.88
Groceries	●	Composite Ranking	
Sauce	●	Quality Rank	2
Pita	●	Quantity (Mass) Rank	9
Customer Service	●	Meatiness Rank	5

- Optionality to add cheese
- The small option is small in comparison with other vendors that offer a small size
- Pickles and turnips had a very nice crunch
- Staff was generally very friendly and welcoming
- Excellent quality of meat

RANKING SENSITIVITY⁽²⁾

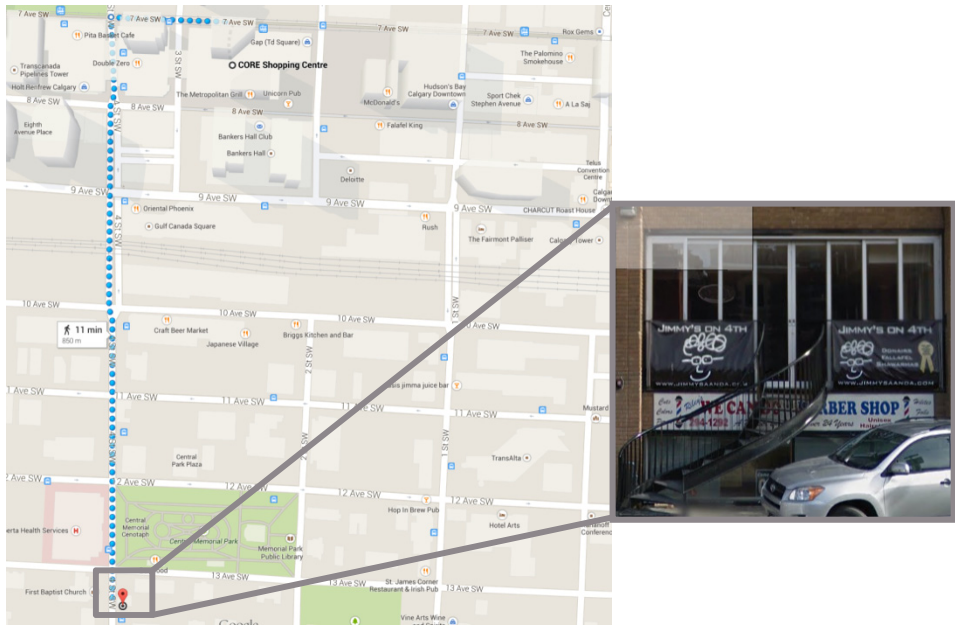


7 | 1. Distance from The Core Shopping Centre.
 2. Note that while the third variable (Meatiness) is not shown, it is inherently implied through subtracting the two shown factors. E.g. in a scenario with a 40% weighting for both quantity and quality factors, 20% would be the implied factor for Meatiness.

#3 | Jimmy's A&A

1304 4 St SW

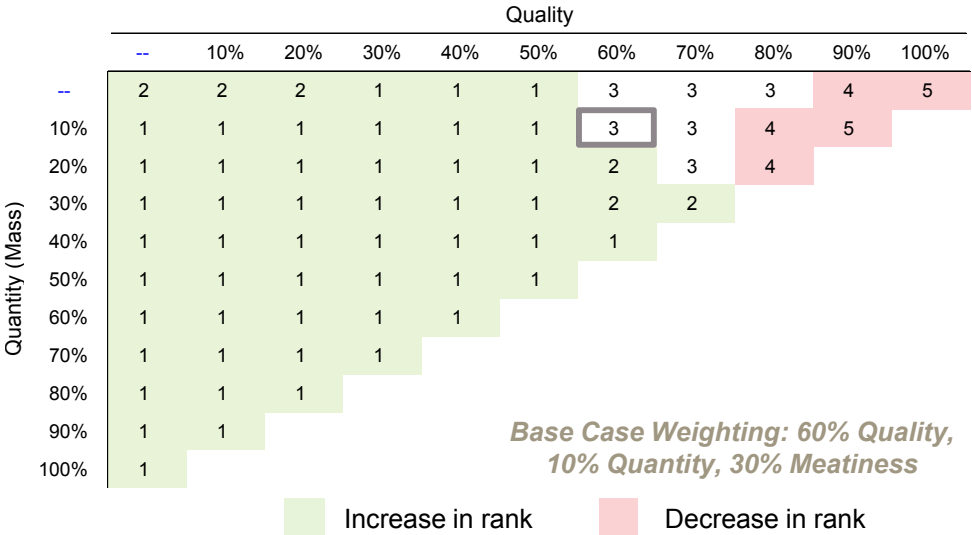
LOCATION MAP



DONAIR SNAPSHOT

Key Details		Quantity Measures	
Date of Sample	13-Feb-15	Mass (g) ⁽³⁾	668
Nearest Landmark	Central Memorial	Meat (g) ⁽³⁾	285
Distance (m) ⁽¹⁾	850	Meatiness (%)	42.7%
Weekday Hours	11:00AM-8:00PM	Value Measures	
Quality Measures		Price (Before Tax) (C\$)	\$12.38
Meat		Price / Mass (C\$ / kg)	\$18.53
Groceries		Composite Ranking	
Sauce		Quality Rank	5
Pita		Quantity (Mass) Rank	1
Customer Service		Meatiness Rank	2

RANKING SENSITIVITY⁽²⁾



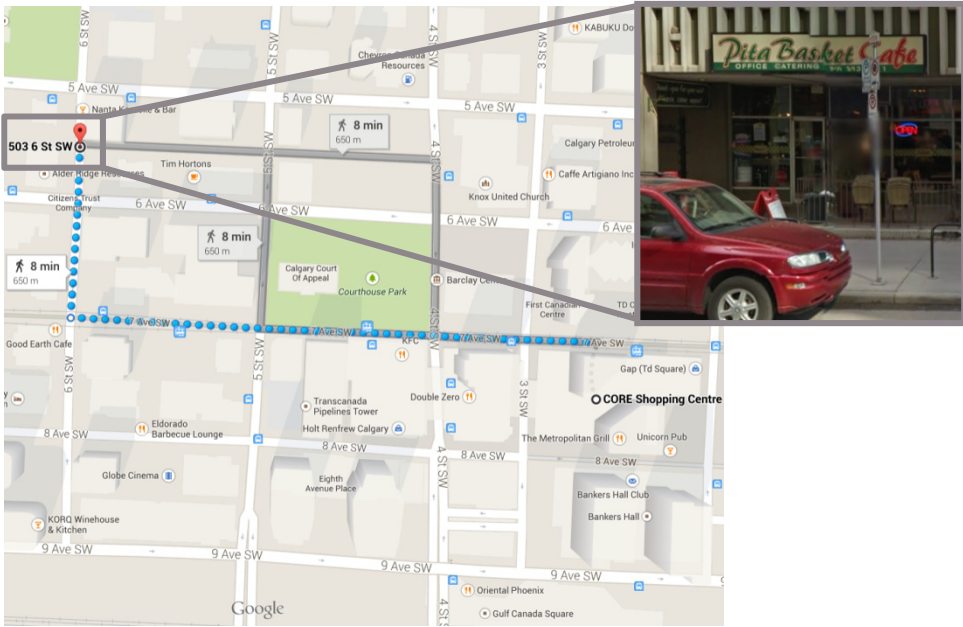
- Massive portions; the sample was a bully among the peer group
- Quality of ingredients was underwhelming (no pickles, too much lettuce)
- Great quality of meat
- The iconic Jimmy was not present during our visit; customer service score likely would have ranked higher had he been present
- Note that the servers only used one glove when making the donair

8 | 1. Distance from The Core Shopping Centre.
 2. Note that while the third variable (Meatiness) is not shown, it is inherently implied through subtracting the two shown factors. E.g. in a scenario with a 40% weighting for both quantity and quality factors, 20% would be the implied factor for Meatiness.

#4 | Pita Basket

503 6 St SW

LOCATION MAP



DONAIR SNAPSHOT

Key Details		Quantity Measures	
Date of Sample	27-Jan-14	Mass (g) ⁽³⁾	646
Nearest Landmark	Bantrel	Meat (g) ⁽³⁾	275
Distance (m) ⁽¹⁾	650	Meatiness (%)	42.6%
Weekday Hours	9:00AM-7:00PM	Value Measures	
Quality Measures		Price (Before Tax) (C\$)	\$8.95
Meat		Price / Mass (C\$ / kg)	\$13.85
Groceries		Composite Ranking	
Sauce		Quality Rank	5
Pita		Quantity (Mass) Rank	2
Customer Service		Meatiness Rank	3

RANKING SENSITIVITY⁽²⁾



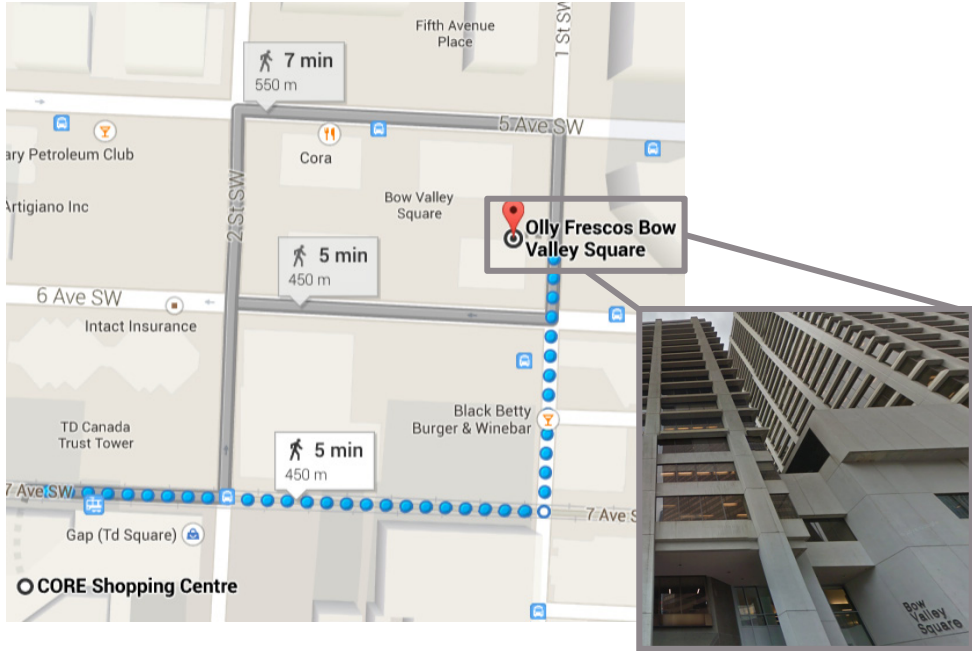
- Pleasant aroma from several metres outside of the store
- Extremely crisp vegetables; addition of radishes was a welcomed surprise
- Excellent spice mix used for meat
- No option to grill the pita; cold pita less desirable
- No option for garlic sauce or hummus
- No friendly smiles
- Note that the servers did not use of gloves when making the donair

9 | 1. Distance from The Core Shopping Centre.
 2. Note that while the third variable (Meatiness) is not shown, it is inherently implied through subtracting the two shown factors. E.g. in a scenario with a 40% weighting for both quantity and quality factors, 20% would be the implied factor for Meatiness.

#5 | Olly Fresco's

205 5th avenue
SW #231

LOCATION MAP

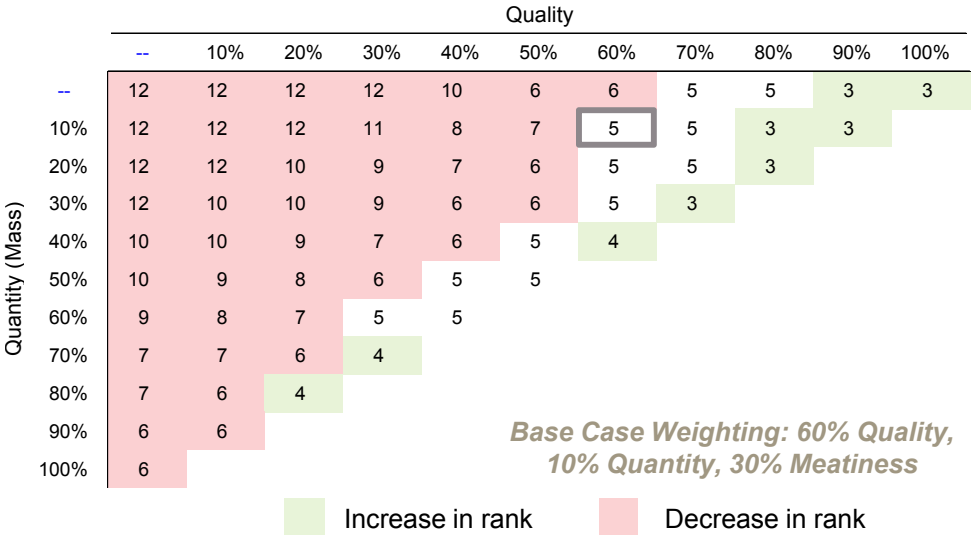


DONAIR SNAPSHOT

Key Details		Quantity Measures	
Date of Sample	17-Feb-15	Mass (g) ⁽³⁾	493
Nearest Landmark	Bow Valley Square	Meat (g) ⁽³⁾	143
Distance (m) ⁽¹⁾	450	Meatiness (%)	29.0%
Weekday Hours	10:30AM-2:00PM	Value Measures	
Quality Measures		Price (Before Tax) (C\$)	\$8.99
Meat		Price / Mass (C\$ / kg)	\$18.24
Groceries		Composite Ranking	
Sauce		Quality Rank	3
Pita		Quantity (Mass) Rank	6
Customer Service		Meatiness Rank	12

- Excellent donair across the board
- Male server appears to generally be more favourable with distribution of meat in comparison to female server⁽³⁾
- Pickles and turnips have excellent crunch
- Optionality to buy other items (e.g. fruits, snacks) from the market is nice
- Staff was very friendly
- Great meat; great sauce

RANKING SENSITIVITY⁽²⁾

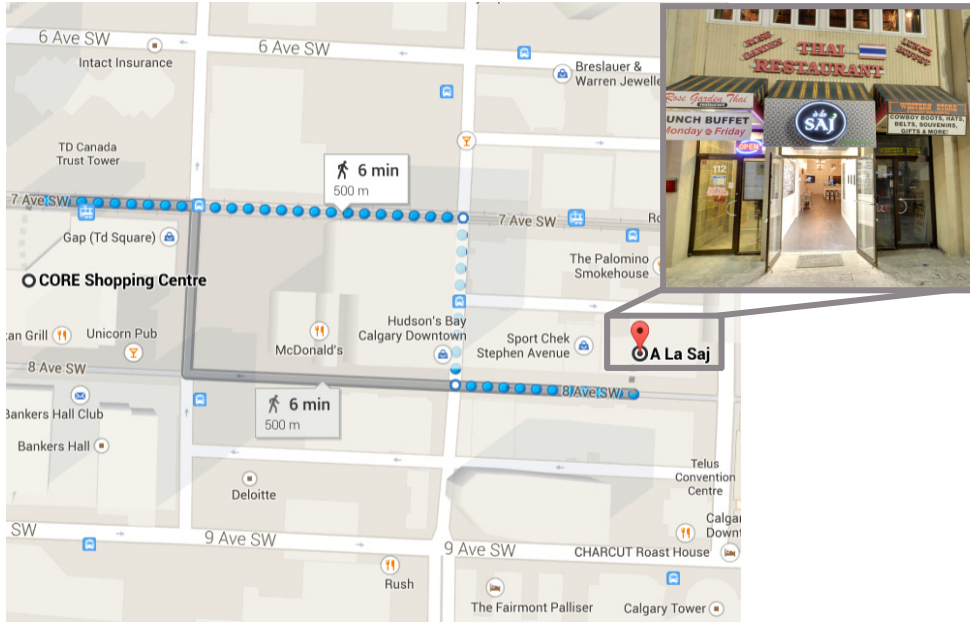


10 | 1. Distance from The Core Shopping Centre.
 2. Note that while the third variable (Meatiness) is not shown, it is inherently implied through subtracting the two shown factors. E.g. in a scenario with a 40% weighting for both quantity and quality factors, 20% would be the implied factor for Meatiness.
 3. Mass and Meatiness were taken as an average of donairs provided by both the male and female server.

#6 | A la Saj

112 8th Avenue SW

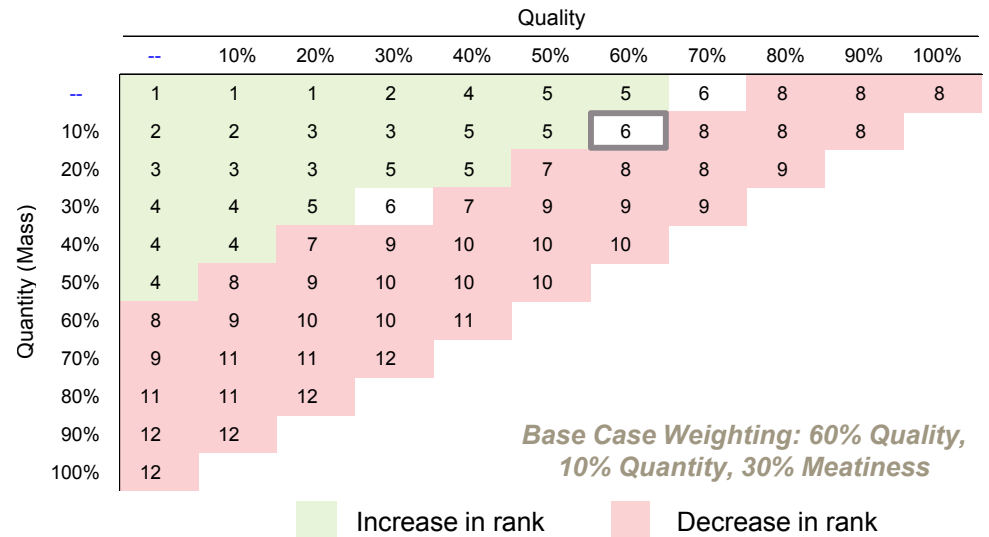
LOCATION MAP



DONAIR SNAPSHOT

Key Details		Quantity Measures	
Date of Sample	04-Feb-15	Mass (g) ⁽³⁾	317
Nearest Landmark	Sportchek	Meat (g) ⁽³⁾	137
Distance (m) ⁽¹⁾	500	Meatiness (%)	43.2%
Weekday Hours	11:00AM-12:00AM	Value Measures	
Quality Measures		Price (Before Tax) (C\$)	\$10.50
Meat		Price / Mass (C\$ / kg)	\$33.12
Groceries		Composite Ranking	
Sauce		Quality Rank	8
Pita		Quantity (Mass) Rank	12
Customer Service		Meatiness Rank	1

RANKING SENSITIVITY⁽²⁾



- Syrian-style donair
- Business hours appear to be guidelines; took three attempts to sample this donair due to late opening
- Frosted glass pane means there is no visibility with respect to ingredients; general air of mystery as to what is going on behind the counter
- To-go box separates vegetables and garlic sauce (vs. competitor donairs being prepared for immediate consumption)
- Thin pita was nice; however, however dryness prevented a higher score
- Portion size was the smallest in the peer group
- Limited vegetable offering (only pickles and turnips)

11 | 1. Distance from The Core Shopping Centre.
 2. Note that while the third variable (Meatiness) is not shown, it is inherently implied through subtracting the two shown factors. E.g. in a scenario with a 40% weighting for both quantity and quality factors, 20% would be the implied factor for Meatiness.

#7 | Falafel King

225 8th Avenue SW

LOCATION MAP

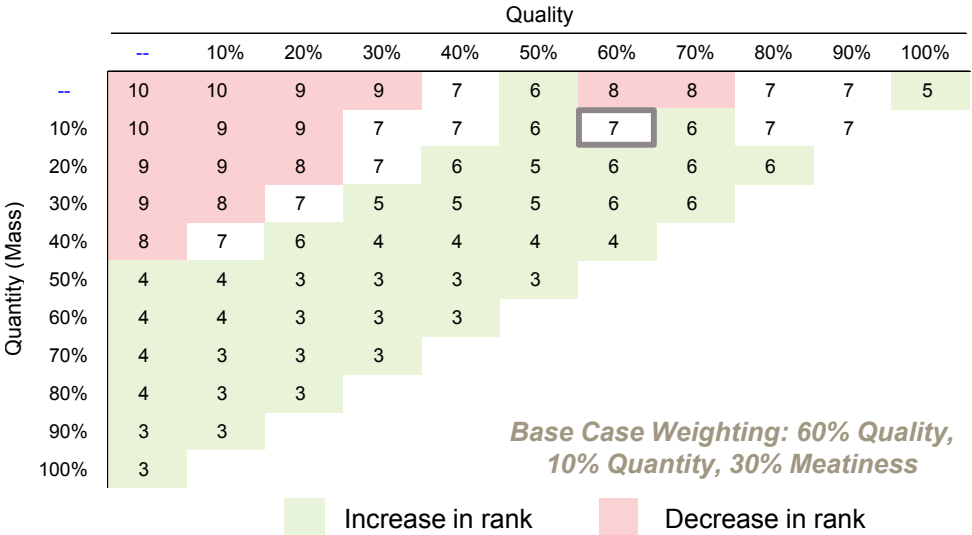


DONAIR SNAPSHOT

Key Details		Quantity Measures	
Date of Sample	29-Jan-14	Mass (g) ⁽³⁾	556
Nearest Landmark	Scotia Centre	Meat (g) ⁽³⁾	183
Distance (m) ⁽¹⁾	290	Meatiness (%)	32.9%
Weekday Hours	10:00AM-8:00PM	Value Measures	
Quality Measures		Price (Before Tax) (C\$)	\$9.05
Meat	●	Price / Mass (C\$ / kg)	\$16.28
Groceries	●	Composite Ranking	
Sauce	●	Quality Rank	5
Pita	●	Quantity (Mass) Rank	3
Customer Service	●	Meatiness Rank	10

- Lunch rush is well managed by Henry Ford-style assembly line
- Staple of downtown Calgary Mediterranean cuisine; a household name for donairs
- Broad vegetable offering
- Average quality of meat
- Customer service was generally friendly with server offering complementary baklava

RANKING SENSITIVITY⁽²⁾

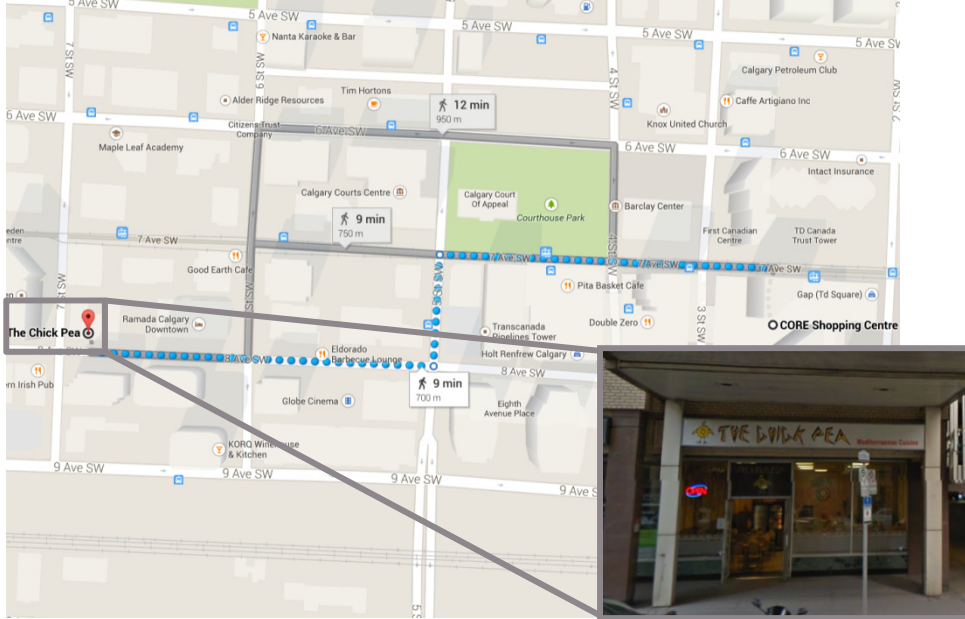


12 | 1. Distance from The Core Shopping Centre.
 2. Note that while the third variable (Meatiness) is not shown, it is inherently implied through subtracting the two shown factors. E.g. in a scenario with a 40% weighting for both quantity and quality factors, 20% would be the implied factor for Meatiness.

#8 | The Chick Pea

732 8th Avenue SW

LOCATION MAP

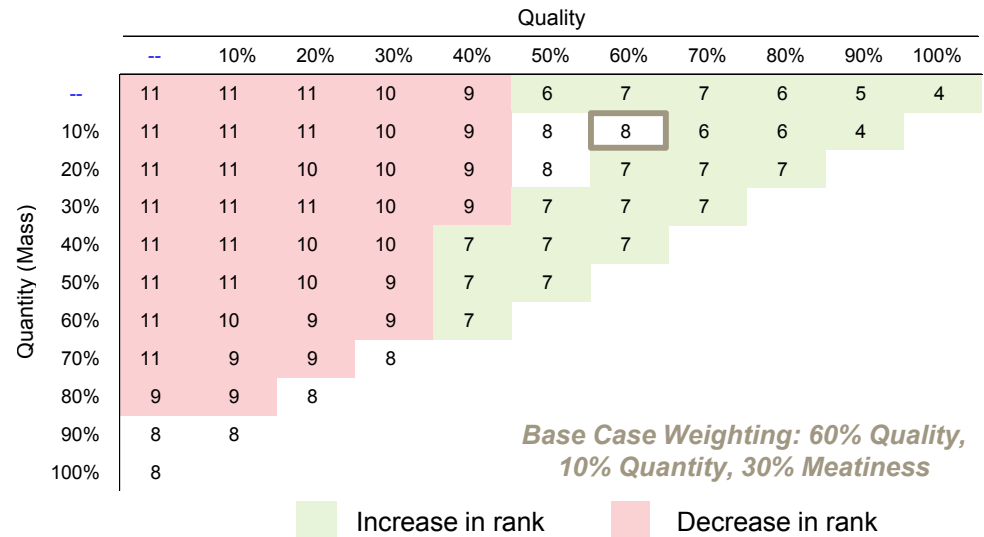


DONAIR SNAPSHOT

Key Details		Quantity Measures	
Date of Sample	28-Jan-14	Mass (g) ⁽³⁾	449
Nearest Landmark	Husky	Meat (g) ⁽³⁾	136
Distance (m) ⁽¹⁾	700	Meatiness (%)	30.3%
Weekday Hours	10:00AM-4:00PM	Value Measures	
Quality Measures		Price (Before Tax) (C\$)	\$8.50
Meat	●	Price / Mass (C\$ / kg)	\$18.93
Groceries	●	Composite Ranking	
Sauce	●	Quality Rank	4
Pita	●	Quantity (Mass) Rank	8
Customer Service	●	Meatiness Rank	11

RANKING SENSITIVITY⁽²⁾

- Pleasant aroma from nearly half a block away from the storefront
- Plenty of sauce options (great hot sauce)
- Proportion of lettuce with respect to the overall vegetable offering was too high
- Meat was mediocre
- Average customer service (no friendly smiles)
- Only one size available



13 | 1. Distance from The Core Shopping Centre.
 2. Note that while the third variable (Meatiness) is not shown, it is inherently implied through subtracting the two shown factors. E.g. in a scenario with a 40% weighting for both quantity and quality factors, 20% would be the implied factor for Meatiness.

#9 | Cedar's Deli

240 4th Avenue SW

LOCATION MAP

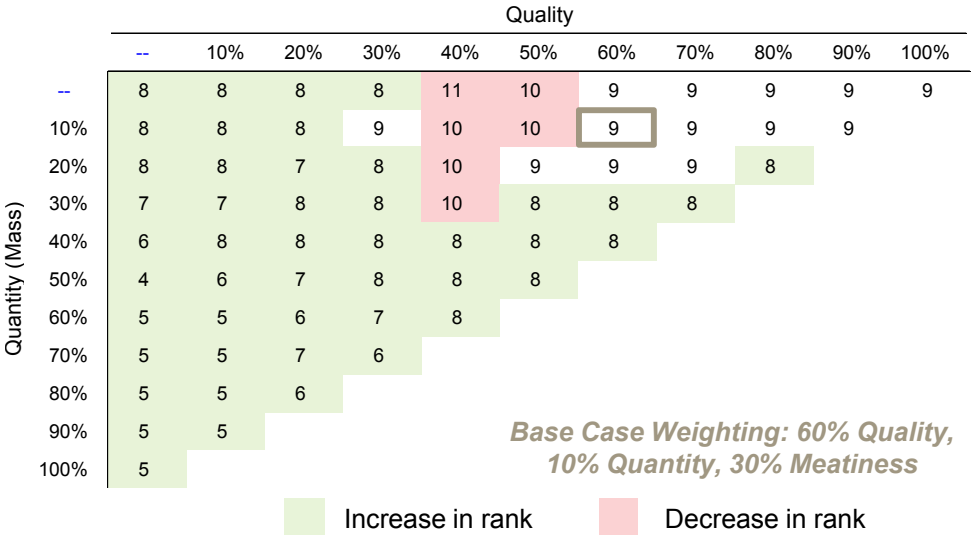


DONAIR SNAPSHOT

Key Details		Quantity Measures	
Date of Sample	09-Feb-15	Mass (g) ⁽³⁾	537
Nearest Landmark	BP Centre	Meat (g) ⁽³⁾	188
Distance (m) ⁽¹⁾	450	Meatiness (%)	35.0%
Weekday Hours	9:00AM-4:30PM	Value Measures	
Quality Measures		Price (Before Tax) (C\$)	\$11.50
Meat		Price / Mass (C\$ / kg)	\$21.42
Groceries		Composite Ranking	
Sauce		Quality Rank	9
Pita		Quantity (Mass) Rank	5
Customer Service		Meatiness Rank	8

- Flavourful meat
- Inclusion of coleslaw drew polarizing opinions on quality ranking of vegetables
- Several sauce options but flavour lacked punch
- Owner was friendly, however service was slow

RANKING SENSITIVITY⁽²⁾

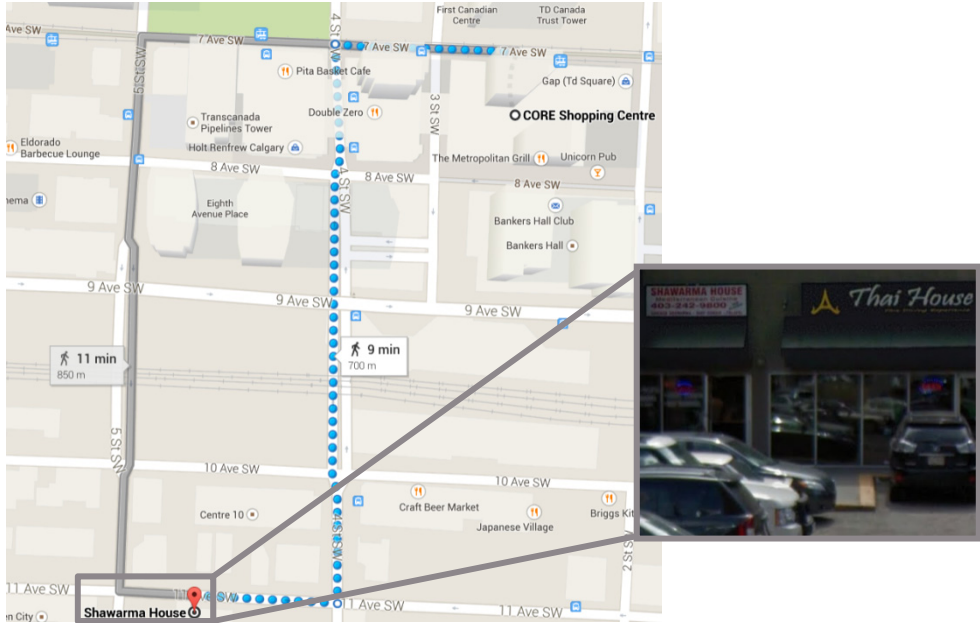


14 | 1. Distance from The Core Shopping Centre.
 2. Note that while the third variable (Meatiness) is not shown, it is inherently implied through subtracting the two shown factors. E.g. in a scenario with a 40% weighting for both quantity and quality factors, 20% would be the implied factor for Meatiness.

#10 | Shawarma House

555 11 Avenue SW

LOCATION MAP



DONAIR SNAPSHOT

Key Details

Date of Sample	05-Feb-15
Nearest Landmark	Singapore Sam's
Distance (m) ⁽¹⁾	700
Weekday Hours	10:00AM-11:00PM

Quantity Measures

Mass (g) ⁽³⁾	548
Meat (g) ⁽³⁾	214
Meatiness (%)	39.1%

Quality Measures

Meat	
Groceries	
Sauce	
Pita	
Customer Service	

Value Measures

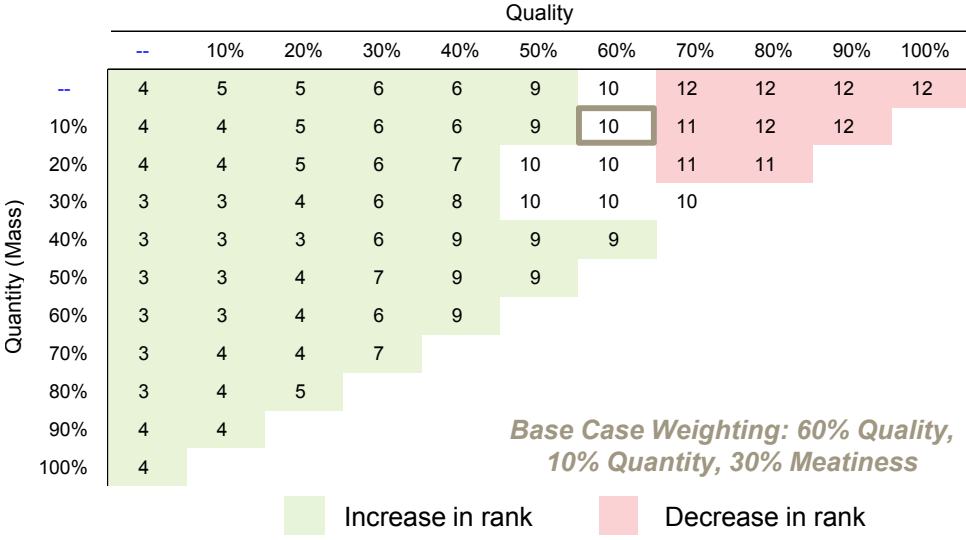
Price (Before Tax) (C\$)	\$9.05
Price / Mass (C\$ / kg)	\$16.51

Composite Ranking

Quality Rank	12
Quantity (Mass) Rank	4
Meatiness Rank	4

RANKING SENSITIVITY⁽²⁾

- Run-of-the-mill donair
- Meat had a leathery texture and appearance
- Very good customer service
 - Shakes patrons hands, and asks how they are doing
 - Mohammed is well known in the donair community (previous post was at Falafel King)
- Poor distribution of vegetables throughout the donair
- Juice from tomatoes made other vegetables and pita soggy
- Note that vendor did not use gloves when making the donair

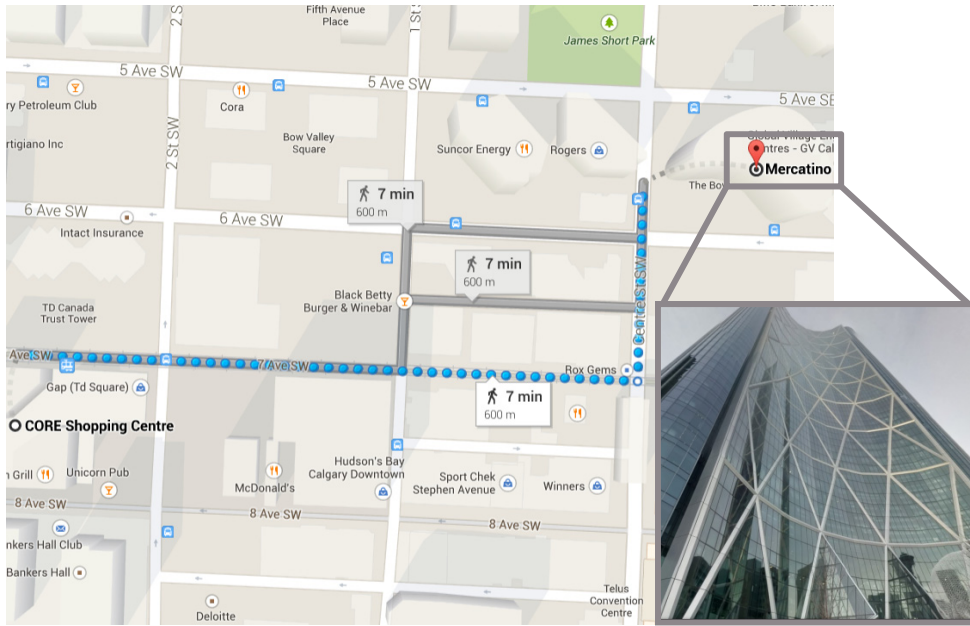


15 | 1. Distance from The Core Shopping Centre.
 2. Note that while the third variable (Meatiness) is not shown, it is inherently implied through subtracting the two shown factors. E.g. in a scenario with a 40% weighting for both quantity and quality factors, 20% would be the implied factor for Meatiness.

#11 | Mercatino

500 Centre Street
SE

LOCATION MAP

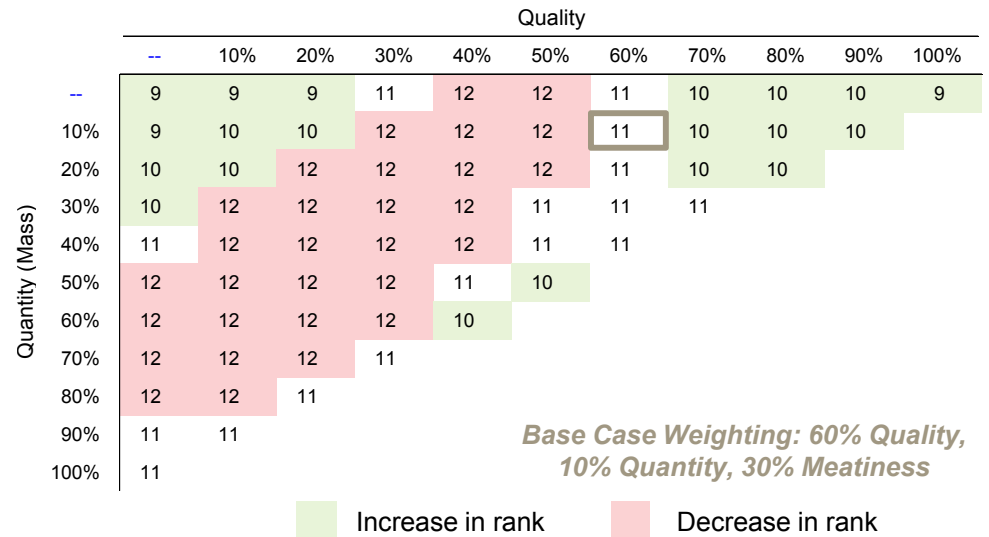


DONAIR SNAPSHOT

Key Details		Quantity Measures	
Date of Sample	02-Feb-15	Mass (g) ⁽³⁾	360
Nearest Landmark	The Bow	Meat (g) ⁽³⁾	120
Distance (m) ⁽¹⁾	600	Meatiness (%)	33.3%
Weekday Hours	6:00AM-5:00PM	Value Measures	
Quality Measures		Price (Before Tax) (C\$)	\$8.50
Meat		Price / Mass (C\$ / kg)	\$23.61
Groceries		Composite Ranking	
Sauce		Quality Rank	9
Pita		Quantity (Mass) Rank	11
Customer Service		Meatiness Rank	9

RANKING SENSITIVITY⁽²⁾

- Optionality to buy other items (e.g. fruits, snacks) from the market is nice
- Good relative proportion of meat however, quality of meat called to question
 - No observable meat spindle
- Excellent homemade Mercatino sauce was unique and warmly welcomed
- Offered optionality of whole wheat vs. white pita
- Customer service was average
- Note that the servers only used one glove when making the donair

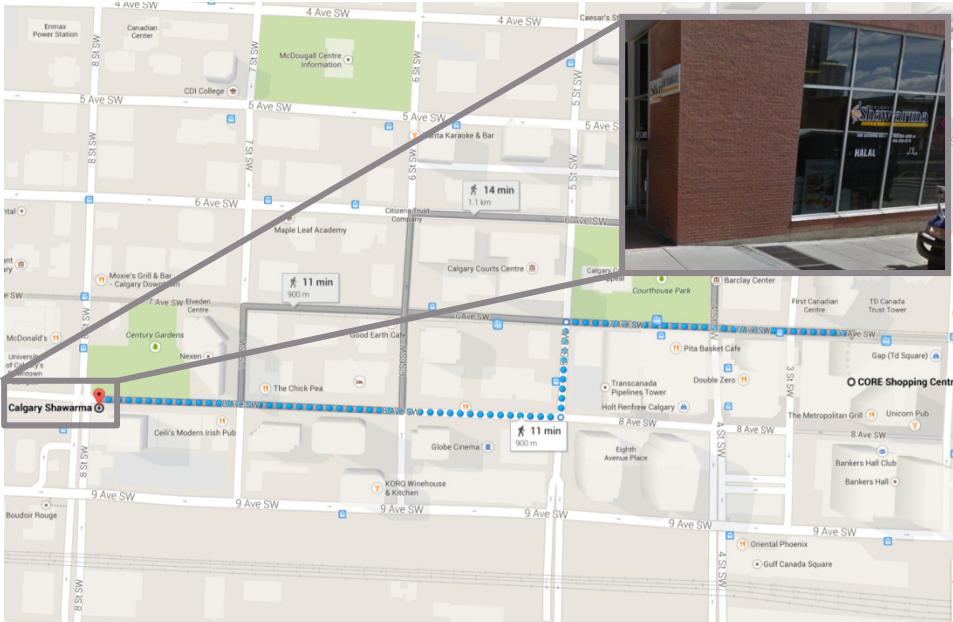


16 | 1. Distance from The Core Shopping Centre.
 2. Note that while the third variable (Meatiness) is not shown, it is inherently implied through subtracting the two shown factors. E.g. in a scenario with a 40% weighting for both quantity and quality factors, 20% would be the implied factor for Meatiness.

#12 | Calgary Shawarma

Unit-102, 855- 8th Avenue SW

LOCATION MAP



DONAIR SNAPSHOT

Key Details		Quantity Measures	
Date of Sample	12-Feb-15	Mass (g) ⁽³⁾	427
Nearest Landmark	Mac's on 8th	Meat (g) ⁽³⁾	158
Distance (m) ⁽¹⁾	900	Meatiness (%)	37.0%
Weekday Hours	10:00AM-9:00PM	Value Measures	
Quality Measures		Price (Before Tax) (C\$)	\$9.99
Meat		Price / Mass (C\$ / kg)	\$23.40
Groceries		Composite Ranking	
Sauce		Quality Rank	11
Pita		Quantity (Mass) Rank	10
Customer Service		Meatiness Rank	6

RANKING SENSITIVITY⁽²⁾

- Frosted glass pane means there is no visibility with respect to ingredients; general air of mystery as to what is going on behind the counter
- Excellent quality of meat (nice spice and good cut)
- Pita was dry and held together poorly making the donair very difficult to eat
- Quality of vegetables left something to be desired
- Option of adding feta cheese for \$0.75 was a welcomed surprise
- Service was fairly slow and staff were not particularly enthusiastic



17 | 1. Distance from The Core Shopping Centre.
 2. Note that while the third variable (Meatiness) is not shown, it is inherently implied through subtracting the two shown factors. E.g. in a scenario with a 40% weighting for both quantity and quality factors, 20% would be the implied factor for Meatiness.

Cheers!



From Nick Graham, Sumeet Gupta & Brian Osiowy

Appendix A: Donair Comparables

Section 1	Survey Summary
Section 2	Donair Profiles
Appendix	A

Donair Comparables

	Key Details		Quantity Measures			Value Measures		Proximity	Quality Measures				
	Date of Sample	Landmark	Mass	Meatiness	Meatiness	Price ⁽¹⁾	Price / Mass	Distance ⁽²⁾	Meat	Groceries	Sauce	Pita	Service
	(kg)		(g)	(g)	(%)	(C\$)	(C\$/kg)	(m)					
Daytime Donairs													
Pita Basket	27-Jan-14	Bantrel	646	275	42.6%	8.95	\$13.85	650					
The Chick Pea	28-Jan-14	Husky	449	136	30.3%	8.50	\$18.93	700					
Falafel King	29-Jan-14	Scotia Centre	556	183	32.9%	9.05	\$16.28	290					
Mercatino	02-Feb-15	The Bow	360	120	33.3%	8.50	\$23.61	600					
Pita Express	03-Feb-15	Shell	463	171	36.9%	7.50	\$16.20	450					
A la Saj	04-Feb-15	Sportchek	317	137	43.2%	10.50	\$33.12	500					
Shawarma House	05-Feb-15	Singapore Sam's	548	214	39.1%	9.05	\$16.51	700					
Cedar's Deli	09-Feb-15	BP Centre	537	188	35.0%	11.50	\$21.42	450					
Calgary Shawarma	12-Feb-15	Mac's on 8th	427	158	37.0%	9.99	\$23.40	900					
Jimmy's A&A	13-Feb-15	Central Memorial	668	285	42.7%	12.38	\$18.53	850					
Olly Fresco's	17-Feb-15	Bow Valley Square	493	143	29.0%	\$8.99	\$18.24	450					
Shems	18-Feb-15	Sun Life Plaza	437	165	37.8%	10.00	\$22.88	50					
Average			492	181	36.6%	\$9.58	\$20.25	549					
Median			478	168	37.0%	\$9.05	\$18.73	550					

1. Pre-tax cost of largest serving size.
2. Distance from The Core Shopping Centre as per Google Maps.