

Restaurant Research's Industry Data Report

Menu & Promotions Update

December 2011

Executive Summary

Restaurant Research's Industry Data Report - Menu & Promotions Update provides unique data including a total menu item count, average check and daypart composition for 41 chains as well as a summary of monthly promotions for 28 chains with an emphasis on new product introductions and LTOs.

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Please refer to following pages for sample exhibits.

RR Clients

Includes major lenders, investors, major US restaurant chains, operators and industry consultants. Please check www.ChainRestaurantData.com for a partial client list and customer testimonials.

More About Us

Restaurant Research LLC leverages an extensive network of industry players as part of its annual Concept Benchmark Analysis due diligence process for 22 large US restaurant chains. Also, RR tracks store level data for all major chains with system-wide sales in excess of \$1B across all major restaurant segments in order to produce 10 key Industry Data Topic reports. For more information please contact us at info@ChainRestaurantData.com or 203-405-1901.

QSR Menu Summary

Chain	Total Menu Items (1)			Average Check		
	2010	2011	% Change	2010	2011	% Change
Arby's						
Burger King						
Carl's Jr.						
Chick-fil-A						
Hardee's						
Jack in the Box						
Jimmy John's						
McDonald's						
Quizno's						
Sonic						
Subway						
Taco Bell						
Wendy's						
Whataburger						
Sandwich						
Domino's						
Little Caesar's						
Papa John's						
Pizza Hut						
Pizza						
Church's						
KFC						
Popeyes						
Chicken						
Dunkin Donuts						
Starbucks						
Coffee/Bakery						
QSR Average						

(1) Total menu item count excludes beverages (except shakes and frozen drinks which are counted as desserts).

Sandwich

Chain	Total Items	Value Menu	Value % Sales	Breakfast	Sides	Entrees	Desserts & Shakes	Average Check	Breakfast	Lunch	Dinner	Late Night/ Snack	Dine-in	Take-out/ Drive-thru
Arby's														
Burger King														
Carl's Jr.														
Chick-fil-A														
Hardee's														
Jack in the Box														
Jimmy John's														
McDonald's														
Quizno's														
Sonic														
Subway														
Taco Bell														
Wendy's														
Whataburger														
Average (1)														

(1) Value menu items are included in appropriate categories and are not in addition to main menu items.

(2) Additional meat options increases the number of menu items but cheese does not.

(3) Includes entree salads.

(4) Total menu items do not include drinks except shakes/specialty drinks which are included in dessert category.

