

# Industry Data Report

## Menus & Promotions – 2018

- **RR's Menu & Promotions analysis** provides data for 56 chains (33 QSR and 23 FSR) including: (1) a 5-year history of total menu items (2013 – 2017); (2) new product intros; (3) average check; (4) daypart sales mix; (5) menu composition; and (6) monthly new product calendar.

### Report Highlights

- Average menu size contracted for the 3rd consecutive year, with QSR paring the most (-6.5% versus -2.3% for FSR). Operations continue to grow more complex with increased menu customization options, new digital ordering platforms and delivery. With speed, convenience and improved food quality at the forefront, the brands increasingly recognize that they can't raise the bar while also trying to be everything to everyone.
- New product introductions and LTOs declined -4.5% for FSR due to a focus on value and efforts to reduce operational complexities but increased +8.8% for QSR (reflecting renewed innovation in the sandwich & coffee/bakery segments).
- Average check growth moderated (+2.3% QSR and +1.8% FSR) due to less aggressive menu price increases and more discounting. Based on an RR survey, franchisees took +2.1% in price during 2017 and expect to take an additional +1.6% in 2018 which should help the industry's relative positioning vs. grocery stores which are finally beginning to moderate their price declines.

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### Menu & Promotions Summary Table

	2013	2014	2015	2016	2017
<b>Average Menu Size</b>					
QSR					
Y/Y % Change					
FSR					
Y/Y % Change					
<b>Average New Product Intros per Year</b>					
QSR					
Y/Y % Change					
FSR					
Y/Y % Change					
<b>Average Check/CPI</b>					
QSR Average Check					
Y/Y % Change					
QSR CPI Y/Y % Change					
FSR Average Check					
Y/Y % Change					
FSR CPI Y/Y % Change					
Food at Home CPI Y/Y % Change					
<b>Economic, Commodity &amp; Labor Data (Y/Y % Change)</b>					
GDP (Current)					
Per Capita Disposable Income (Current)					
BLS Foodstuffs Commodity Basket					
BLS Avg. Hourly Food Service Wages - All Employees					



### QSR Menu Summary

Chain	Menu Size	% Change '17/'16	Average Check	% Change '17/'16	New Products	% Change '17/'16	New Product Focus	Promotion Cadence	Promotion Themes	Value Promotions	Permanent Value
Sonic Drive-In											
Taco Bell											
Wendy's											
Whataburger											
Zaxby's											
<b>Sandwich</b>											

Report Outline

### QSR Menu Summary

Chain	Menu Size	% Change '17/'16	Average Check	% Change '17/'16	New Products	% Change '17/'16	New Product Focus	Promotion Cadence	Promotion Themes	Value Promotions	Permanent Value
Firehouse Subs											
Jersey Mike's											
Jimmy John's											
Subway											
<b>Sub-Sandwich</b>											
Domino's											
Little Caesars											
Papa John's											
Pizza Hut											
<b>Pizza</b>											

Report Outline

### QSR Menu Summary

Chain	Menu Size	% Change '17/'16	Average Check	% Change '17/'16	New Products	% Change '17/'16	New Product Focus	Promotion Cadence	Promotion Themes	Value Promotions	Permanent Value
Bojangles'											
Church's											
KFC											
Popeyes											
Wingstop											
<b>Chicken</b>											
Dunkin Donuts											
Krispy Kreme											
Starbucks											
Tim Horton's											
<b>Coffee/Bakery</b>											
<b>QSR</b>											

Report Outline

(1) Total menu count excludes regular drinks, but includes specialty beverages.  
 (2) New products include both permanent menu additions and limited time offers.

### QSR Menu Size



### QSR Menu Size - Ranked by % Change '17/'16 <sup>(1)</sup>

Chain	2013	2014	2015	2016	2017	% Change '17/'13	% Change '17/'16
McDonald's							
Checkers/ Rally's							
Jack in the Box							
Arby's							
Taco Bell							
Whataburger							
Five Guys							
Chick-fil-A							
Burger King							
Dairy Queen							
Wendy's							
Sonic Drive-In							
Zaxby's							
Culver's							
Carl's Jr.							
Hardee's							
<b>Sandwich</b>							
Subway							
Firehouse Subs							
Jimmy John's							
Jersey Mike's							
<b>Sub-Sandwich</b>							
Papa John's							
Pizza Hut							
Domino's							
Little Caesars							
<b>Pizza</b>							
Church's							
KFC							
Bojangles'							
Wingstop							
Popeyes							
<b>Chicken</b>							
Starbucks							
Tim Horton's							
Krispy Kreme							
Dunkin Donuts							
<b>Coffee/Bakery</b>							
<b>QSR</b>							

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

### QSR New Product Intros - Annual Chain Average (Includes LTOs)



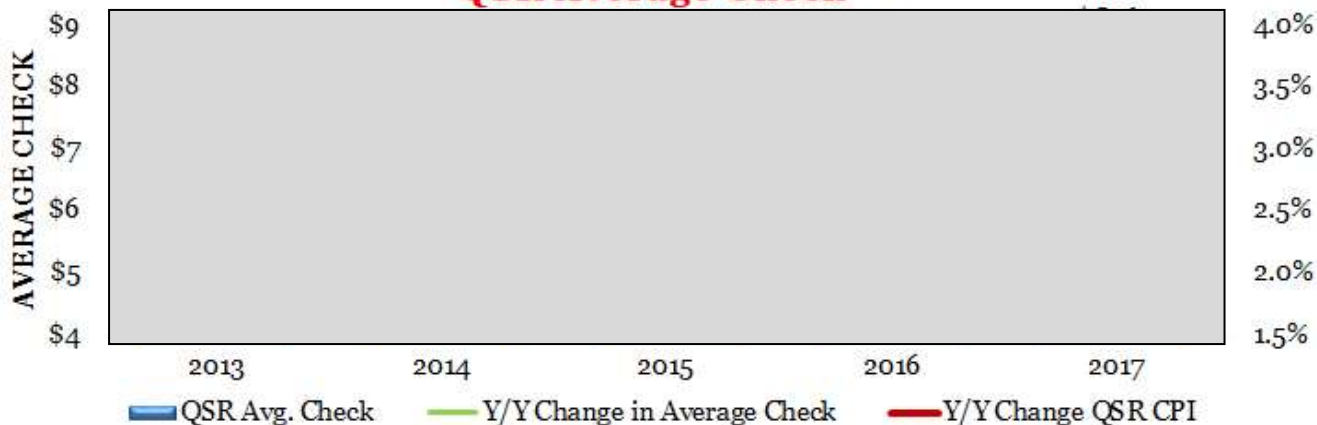
### QSR New Product Summary - (Sorted by '17/'16 % Change)

Chain	Annual New Products & LTOs					2017 New Products	% Change
	2013	2014	2015	2016	2017	% of Total Menu	17/'16
Culver's							
McDonald's							
Checkers/ Rally's							
Burger King							
Jack in the Box							
Arby's							
Zaxby's							
Wendy's							
Hardee's							
Sonic Drive-In							
Chick-fil-A							
Taco Bell							
Dairy Queen							
Carl's Jr.							
Whataburger							
Five Guys							
<b>Sandwich</b>							
Subway							
Jersey Mike's							
Firehouse Subs							
Jimmy John's							
<b>Sub-Sandwich</b>							
Little Caesars							
Domino's							
Papa John's							
Pizza Hut							
<b>Pizza</b>							
Popeyes							
Bojangles'							
Wingstop							
KFC							
Church's							
<b>Chicken</b>							
Starbucks							
Dunkin Donuts							
Tim Horton's							
Krispy Kreme							
<b>Coffee/Bakery</b>							
<b>QSR</b>							

(1) Each flavor or variety counts as a separate new product. New products include both permanent menu additions and limited time offers.



### QSR Average Check



### QSR Average Check - Ranked by % Change '17/'16 <sup>(1)</sup>

Chain	2013	2014	2015	2016	2017	% Change '17/'13	% Change '17/'16
Jack in the Box							
Arby's							
McDonald's							
Carl's Jr.							
Wendy's							
Dairy Queen							
Burger King							
Culver's							
Hardee's							
Zaxby's							
Five Guys							
Checkers/ Rally's							
Taco Bell							
Sonic Drive-In							
<b>Sandwich</b>							
Jersey Mike's							
Subway							
Firehouse Subs							
Jimmy John's							
<b>Sub-Sandwich</b>							
Wingstop							
Popeyes							
Bojangles'							
Church's							
KFC							
<b>Chicken</b>							
Dunkin Donuts							
Starbucks							
Krispy Kreme							
Tim Horton's							
<b>Coffee/Bakery</b>							
<b>QSR</b>							

### QSR Daypart Mix

Concept	Breakfast	Lunch	Dinner	Late Night/ Snack	Off- Premise
<b>Sandwich</b>					
Arby's					
Burger King					
Carl's Jr.					
Checkers/ Rally's					
Culver's					
Dairy Queen					
Five Guys					
Hardee's					
Jack in the Box					
McDonald's					
Sonic Drive-In					
Taco Bell					
Wendy's					
Whataburger					
Zaxby's					
<b>Sub-Sandwich</b>					
Firehouse Subs					
Jersey Mike's					
Jimmy John's					
Subway					
<b>Pizza</b>					
Domino's					
Little Caesars					
Papa John's					
Pizza Hut					
<b>Chicken</b>					
Bojangles'					
Church's					
KFC					
Popeyes					
Wingstop					
<b>Coffee/Bakery</b>					
Dunkin Donuts					
Krispy Kreme					
Starbucks					



FSR Menu Summary

Chain	Menu Size	% Change '17/'16	Average Check	% Change '17/'16	# New Products	% Change '17/'16	New Product Focus	Promotion Cadence	Promotion Themes	Value Promotions	Permanent Value
Applebee's											
Buffalo Wild Wings											
Cheesecake Factory											
Chili's Grill & Bar											
LongHorn											
Olive Garden											
Outback											
Red Lobster											
Red Robin											
Ruby Tuesday											

Report Outline





### FSR Menu Summary

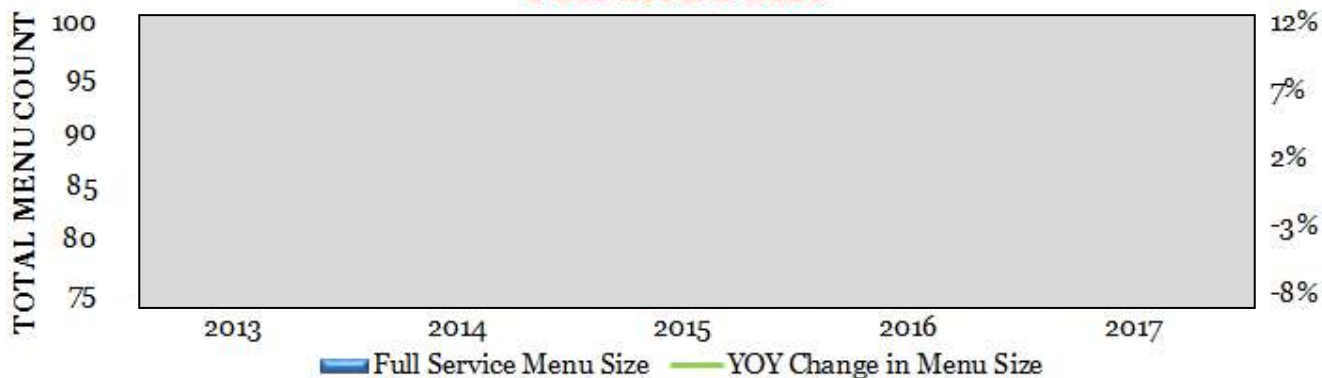
Chain	Menu Size	% Change '17/'16	Average Check	% Change '17/'16	# New Products	% Change '17/'16	New Product Focus	Promotion Cadence	Promotion Themes	Value Promotions	Permanent Value
Corner Bakery Café											
Moe's Southwest Grill											
Panera Bread											
Qdoba											
<b>Fast Casual</b>											
<b>FSR</b>											

(1) Total menu count excludes drinks.

(2) New products include both permanent menu additions and limited time offers.

Report Outline

### FSR Menu Size



### FSR Menu Size - Ranked by % Change '17/'16 <sup>(1)</sup>

Chain	2013	2014	2015	2016	2017	% Change '17/'13	% Change '17/'16
Buffalo Wild Wings							
Ruby Tuesday							
Applebee's							
Olive Garden							
Texas Roadhouse							
Cheesecake Factory							
LongHorn							
Outback							
Red Robin							
T.G.I. Friday's							
Red Lobster							
Chili's Grill & Bar							
<b>Casual</b>							
Cracker Barrel							
IHOP							
Denny's							
Perkins							
Bob Evans							
<b>Family</b>							
Panera Bread							
Moe's Southwest Grill							
Qdoba							
Chipotle							
Corner Bakery Café							
<b>Fast Casual</b>							
<b>FSR</b>							

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

### FSR New Product Intros - Annual Chain Average (Includes LTOs)



### FSR New Product Summary - (Sorted by '17/'16 % Change)

Chain	Annual New Products & LTOs					2017 New Products	% Change
	2013	2014	2015	2016	2017	% of Total Menu	'17/'16
Ruby Tuesday							
LongHorn							
Texas Roadhouse							
Red Lobster							
T.G.I. Friday's							
Red Robin							
Outback							
Olive Garden							
Buffalo Wild Wings							
Cheesecake Factory							
Applebee's							
Chili's Grill & Bar							
<b>Casual</b>							
Golden Corral							
Bob Evans							
IHOP							
Denny's							
Cracker Barrel							
Perkins							
<b>Family</b>							
Qdoba							
Corner Bakery Café							
Chipotle							
Panera Bread							
Moe's Southwest Grill							
<b>Fast Casual</b>							
<b>FSR</b>							

(1) Each flavor or variety counts as a separate new product. New products include both permanent menu additions and limited time offers.

### FSR Average Check



### FSR Average Check - Ranked by % Change '17/'16

Chain	2013	2014	2015	2016	2017	% Change '17/'13	% Change '17/'16
Outback							
Chili's Grill & Bar							
Olive Garden							
Buffalo Wild Wings							
LongHorn							
Red Lobster							
Cheesecake Factory							
Ruby Tuesday							
T.G.I. Friday's							
Texas Roadhouse							
Applebee's							
Red Robin							
<b>Casual</b>							
Denny's							
Perkins							
Bob Evans							
Golden Corral							
IHOP							
Cracker Barrel							
<b>Family</b>							
Panera Bread							
Moe's Southwest Grill							
Chipotle							
Corner Bakery Café							
Qdoba							
<b>Fast Casual</b>							
<b>FSR</b>							



### FSR Daypart Sales Mix

Concept	Breakfast	Lunch	Dinner	Late Night & Snack	Off-Premise	Alcohol Mix
<b>Casual</b>						
Applebee's						
Buffalo Wild Wings						
Cheesecake Factory						
Chili's Grill & Bar						
LongHorn						
Olive Garden						
Outback						
Red Robin						
Ruby Tuesday						
T.G.I. Friday's						
Texas Roadhouse						
<b>Family</b>						
Bob Evans						
Cracker Barrel						
Denny's						
Golden Corral						
IHOP						
Perkins						
<b>Fast Casual</b>						
Corner Bakery Café						
Moe's Southwest Grill						
Panera Bread						
Qdoba						

## Sandwich Menu Composition

Concept	Total Menu Items (*)	Value Menu	Sides	Burgers/ Beef	Chicken	Salads	Other Entrees	Desserts	Specialty Drinks	Breakfast	Kid's Menu
Arby's											
Burger King											
Carl's Jr.											
Checkers/ Rally's											
Chick-fil-A											
Culver's											
Dairy Queen											
Five Guys											
Hardee's											
Jack in the Box											
McDonald's											
Sonic Drive-In											
Taco Bell											
Wendy's											
Whataburger											
Zaxby's											
<b>Sandwich</b>											

## Menu Composition as % of Total Menu Items

Concept
Arby's
Burger King
Carl's Jr.
Checkers/ Rally's
Chick-fil-A
Dairy Queen
Five Guys
Hardee's
Jack in the Box
McDonald's
Sonic Drive-In
Taco Bell
Wendy's
Whataburger
Zaxby's
<b>Sandwich</b>

(1) Total menu item count excludes value menu to avoid double counting and kid's menu.

(2) Wendy's menu count excludes breakfast (only in 7% of stores).

### Sub-Sandwich Menu Composition

Concept	Total Menu Items (*)	Soup & Sides	Subs/ Wraps	Specialty Subs	Create Own SubToppings	Salads	Breakfast	Dessert	Kid's Menu
Firehouse Subs									
Jersey Mike's									
Jimmy John's									
Subway									
<b>Sub-Sandwich</b>									

### Menu Composition as % of Total Menu Items

Concept	Total Menu Items	Soup & Sides	Subs/ Wraps	Specialty Subs	Create Own SubToppings	Salads	Breakfast	Dessert	Kid's Menu
Firehouse Subs									
Jersey Mike's									
Jimmy John's									
Subway									
<b>Sub-Sandwich</b>									

(\*) Total menu item count excludes kids menu and Create Your Own Sub Toppings.

Report Outline

## Pizza Menu Composition

Concept	Total Menu Items <sup>(1)</sup>	Apps/ Sides	Crust Options	Toppings	Specialty Pizzas	Sandwiches	Pasta/ Other	Desserts
Domino's								
Little Caesars								
Papa John's								
Pizza Hut								
<b>Pizza</b>								

## Menu Composition as % of Total Menu Items

Concept	Total Menu Items	Apps/ Sides	Create Your Own Pizza <sup>(2)</sup>	Specialty Pizzas	Sandwiches	Pasta/ Other	Desserts
Domino's							
Little Caesars							
Papa John's							
Pizza Hut							
<b>Pizza</b>							

(1) Total menu item count includes an estimate for the number of regular pizzas based on crust options multiplied by the number of available toppings.

(2) Create your own pizza estimate based on crust options multiplied by the number of available toppings.

## Chicken Menu Composition

Concept	Total Menu Items <sup>(1)</sup>	Sides	Bone-in Chicken	Boneless & Wings	Sandwiches/ Wraps	Other / Breakfast	Salads	Desserts	Kid's Menu
Bojangles'									
Church's									
KFC									
Popeyes									
Wingstop									
<b>Chicken</b>									

## Menu Composition as % of Total Menu Items

Concept	Total Menu Items	Sides	Bone-in Chicken	Boneless & Wings	Sandwiches/ Wraps	Other Entrees	Salads	Desserts	Kid's Menu
Bojangles'									
Church's									
KFC									
Popeyes									
Wingstop									
<b>Chicken</b>									

(\*) Total menu item count excludes kids menu.

### Coffee/Bakery Menu Composition

Concept	Total Menu Items	Lunch/Sandwiches	Breakfast	Baked Goods	Hot Specialty Beverages	Cold Specialty Beverages	Hot Coffee	Iced Coffee	Tea	Other
Dunkin Donuts										
Krispy Kreme										
Starbucks										
Tim Horton's										
<b>Coffee/Bakery</b>										

### Menu Composition as % of Total Menu Items

Concept	Total Menu Items	Lunch/Sandwiches	Breakfast	Baked Goods	Hot Specialty Beverages	Cold Specialty Beverages	Hot Coffee	Iced Coffee	Tea	Other
Dunkin Donuts										
Krispy Kreme										
Starbucks										
Tim Horton's										
<b>Coffee/Bakery</b>										

Report Outline



## Casual Dining Menu Composition

Concept	Total Menu Items <sup>(1)</sup>	Apps & Soup	Salads	Burgers	Chicken	Beef	Sandwiches/ Wraps	Seafood	Desserts	Other Entrees	Combo Platters	Lighter Options
Applebee's												
Buffalo Wild Wings												
Cheesecake Factory												
Chili's Grill & Bar												
LongHorn												
Olive Garden												
Outback												
Red Lobster												
Red Robin												
Ruby Tuesday												
T.G.I. Friday's												
Texas Roadhouse												
<b>Casual</b>												

## Menu Composition as % of Total Menu Items

Concept	Total Menu Items	Apps & Soup	Salads	Burgers	Chicken	Beef	Sandwiches/ Wraps	Seafood	Desserts	Other Entrees	Combo Platters	Lighter Options
Applebee's												
Buffalo Wild Wings												
Cheesecake Factory												
Chili's Grill & Bar												
LongHorn												
Olive Garden												
Outback												
Red Lobster												
Red Robin												
Ruby Tuesday												
T.G.I. Friday's												
Texas Roadhouse												
<b>Casual</b>												

(1) Total menu item count excludes side items, lunch menu and kid's menu. Cheesecake Factory excludes brunch menu.

### Family Menu Composition

Concept	Total Menu Items <sup>(1)</sup>	Appetizers & Soup	Salads	Burgers	Chicken	Beef	Sandwiches/ Wraps	Seafood	Other	Breakfast	Desserts	Value Menu	Lighter Options	Senior	Kid's
Bob Evans															
Cracker Barrel															
Denny's															
IHOP															
Perkins															
<b>Family</b>															

### Menu Composition as % of Total Menu Items

Concept	Total Menu Items	Appetizers & Soup	Salads	Burgers	Chicken	Beef	Sandwiches/ Wraps	Seafood	Other	Breakfast	Desserts	Value Menu	Lighter Options	Senior	Kid's
Bob Evans															
Cracker Barrel															
Denny's															
IHOP															
Perkins															
<b>Family</b>															

(1) Total menu item count excludes value, lighter options, senior and kid's menus to avoid double counting.

Report Outline



### Fast Casual Menu Composition

Concept	Total Menu Items	Breakfast	Appetizers, Sides & Soup	Salads	Lunch/ Dinner	Baked Goods/ Desserts	Specialty Hot Drinks	Specialty Cold Drinks	Kids Menu
Chipotle									
Corner Bakery Café									
Moe's Southwest Grill									
Panera Bread									
Qdoba									
<b>Fast Casual</b>									

### Menu Composition as % of Total Menu Items

Concept	Total Menu Items	Breakfast	Appetizers, Sides & Soup	Salads	Lunch/ Dinner	Baked Goods/ Desserts	Specialty Hot Drinks	Specialty Cold Drinks	Kids Menu
Chipotle									
Corner Bakery Café									
Moe's Southwest Grill									
Panera Bread									
Qdoba									
<b>Fast Casual</b>									

(\*) Total menu item count excludes kid's menu.

Report Outline

**New Product Calendar - 2017**

Chain	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Total New 2017
<b>Sandwich</b>													
Arby's													
Burger King													
Carl's Jr.													
Checkers/ Rally's													
Chick-fil-A													
Culver's													
Dairy Queen													
Five Guys													
Hardee's													

Report Outline



New Product Calendar - 2017

Chain	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Total New 2017
Jimmy John's													
Quizno's													
Subway													
<b>Pizza</b>													
Domino's													
Little Caesars													
Papa John's													
Pizza Hut													
<b>Chicken</b>													
Bojangles'													
Church's													
KFC													
Popeyes													
Wingstop													

Report Outline

**New Product Calendar - 2017**

Chain	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Total New 2017
<b>Coffee/Bakery</b>													
Dunkin Donuts													
Krispy Kreme													
Starbucks													
Tim Horton's													

Report Outline

New Product Calendar - 2017

Chain	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Total New 2017
<b>Casual</b>													
Applebee's													
Buffalo Wild Wings													
Cheesecake Factory													
Chili's Grill & Bar													
LongHorn													
Olive Garden													
Outback													

Report Outline

New Product Calendar - 2017

Chain	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Total New 2017
Red Lobster													
Red Robin													
Ruby Tuesday													
T.G.I. Friday's													
Texas Roadhouse													

Report Outline

**New Product Calendar - 2017**

Chain	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Total New 2017
<b>Family</b>													
Bob Evans													
Cracker Barrel													
Denny's													
Golden Corral													
IHOP													
Perkins													

Report Outline



New Product Calendar - 2017

Chain	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Total New 2017
<b>Fast Casual</b>													
Chipotle									Queso				1
Corner Bakery Café													
Moe's Southwest Grill													
Panera Bread													
Qdoba													

Report Outline

## All Inclusive Subscription Package

*Value-Added Data & Insight for \$1B+ Chains*

### Concept Benchmarking Reports

Applebee's	Arby's	Burger King	Carl's Jr.
Chili's Grill & Bar	Church's	Denny's	Domino's
Hardee's	IHOP	Jack in the Box	KFC
McDonald's	Panera Bread	Papa John's	Pizza Hut
Popeyes	Sonic Drive-In	Subway	Taco Bell
TGI Friday's	Wendy's	Quarterly Concept Updates*	

### Industry Benchmarking (49 Chains)

Store Level	Systemwide	Finance
New Unit Investment Report	Quarterly Same Store Sales Database*	Unit Level Valuations
Remodeling Report	Annual RR Databook*	Report
Unit Economics Report	Unit & Sales Growth Analysis Report	Franchise Finance
Operations Matrix Report	Menu & Promotions Report	Report
Marketing Spend Report	Annual State Unit Databook*	
	Commodities Database*	

\* Only available as part of subscription.

### FDD/UFOC library for 37 Chains

Visit [www.chainrestaurantdata.com](http://www.chainrestaurantdata.com) or contact us at  
(860) 352-2198 or [info@ChainRestaurantData.com](mailto:info@ChainRestaurantData.com)

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