Menus & Promotions – 2024

Key Points

- While the average menu item count for the $1B+ Chains has been stable since 2021, the 2023 QSR total average menu count is -17% under its 2014 peak and FSR is -20.5% under its 2012 peak.
- The average annual number of new product intros per chain in 2023 increased +18.7% y/y to 9.5 for QSR (representing a steady increase from 2020 to a level in-line with its 2010–2019 historical average) and +12.1% y/y to 9.7 for FSR (which remains about 33% lower than the 2010–2019 period).
- The 2023 y/y average check growth rate moderated slightly for both QSR (+6.2%) & FSR (+5.7%) and came-in under the 2023 CPI growth rate (+7.0% QSR & +6.0% FSR).
- Notably, the aggregate 5-year average check growth rate (+37.3% QSR & +28.1% FSR) significantly outpaced total restaurant CPI (+27.8% QSR & +23.7% FSR) and food at home CPI (+25.3%) during the same period.
- To help compensate for higher core menu prices, the level of QSR promotional value mix increased to 49.7% in 2023 from 33.8% in 2022. Conversely, the FSR discounting mix was basically unchanged at 31%.

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Data in spreadsheet form available at http://www.ChainRestaurantData.com

Report Outline

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Menu & Promotions Summary Table

	2019	2020	2021	2022	2023
Average Menu Size					
QSR					
Y/Y % Change					
FSR					
Y/Y % Change					
Average New Product Intros per Year					
QSR					
Y/Y % Change					
QSR Promotions New Product Mix					
FSR					
Y/Y % Change					
FSR Promotions New Product Mix					
Average Check/CPI					
QSR Average Check					
Y/Y % Change					
QSR Promotions Value Mix					
QSR CPI Y/Y % Change					
FSR Average Check					
Y/Y % Change					
FSR Promotions Value Mix					
FSR CPI Y/Y % Change					
Food at Home CPI Y/Y % Change					
Economic, Commodity & Labor Data (Y/Y % Change)					
GDP (Current) (1)					
Per Capita Disposable Income (Current) (2)					
BLS Foodstuffs Commodity Basket					
BLS Avg. Hourly Food Service Wages - All Employees					

Report Outline

Restaurant Research®

QSR Menu Summary

Chain	Menu Size	% Change '23/'22	Average Check	% Change '23/'22	# New Products	% Change '23/'22	Value Promo Mix	% Change '23/22	New Product Focus	Promotion Cadence	Promotion Themes	Value Promotions	Permanent Value
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													
Sandwich													

Report Outline

Restaurant Research®

QSR Menu Summary

Chain	Menu Size	% Change '23/'22	Average Check	% Change '23/'22	# New Products	% Change '23/'22	Value Promo Mix	% Change '23/22	New Product Focus	Promotion Cadence	Promotion Themes	Value Promotions	Permanent Value
Firehouse Subs													
Jersey Mike's													
Jimmy John's													
Subway													
Sub-Sandwich													
Domino's													
Little Caesars													
Papa John's													
Pizza Hut													
Pizza													
Bojangles'													
Church's													
KFC													
Popeyes													
Wingstop													
Chicken													

Report Outline

Restaurant Research®

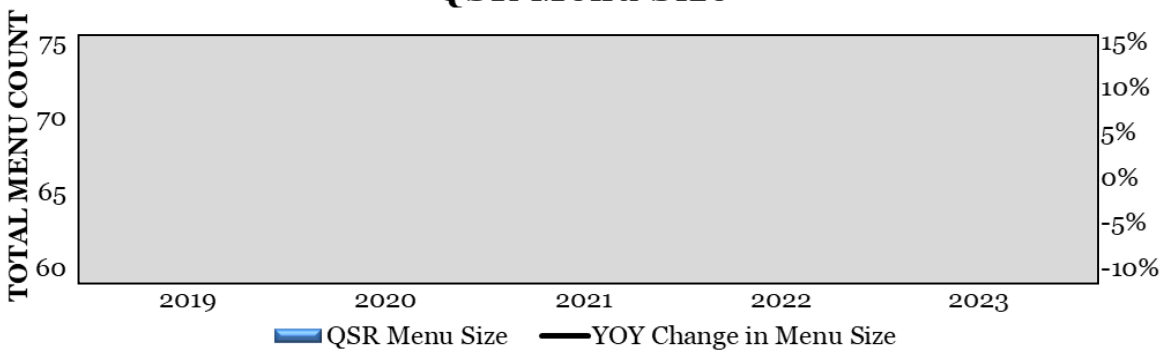
QSR Menu Summary

Chain	Menu Size	% Change '23/'22	Average Check	% Change '23/'22	# New Products	% Change '23/'22	Value Promo Mix	% Change '23/22	New Product Focus	Promotion Cadence	Promotion Themes	Value Promotions	Permanent Value
Dunkin'													
Dutch Bros Coffee													
Krispy Kreme													
Starbucks													
Tim Horton's													
Coffee/Bakery													
QSR													

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

Report Outline

QSR Menu Size



QSR Menu Size - *Ranked by % Change '23/'22* (1)

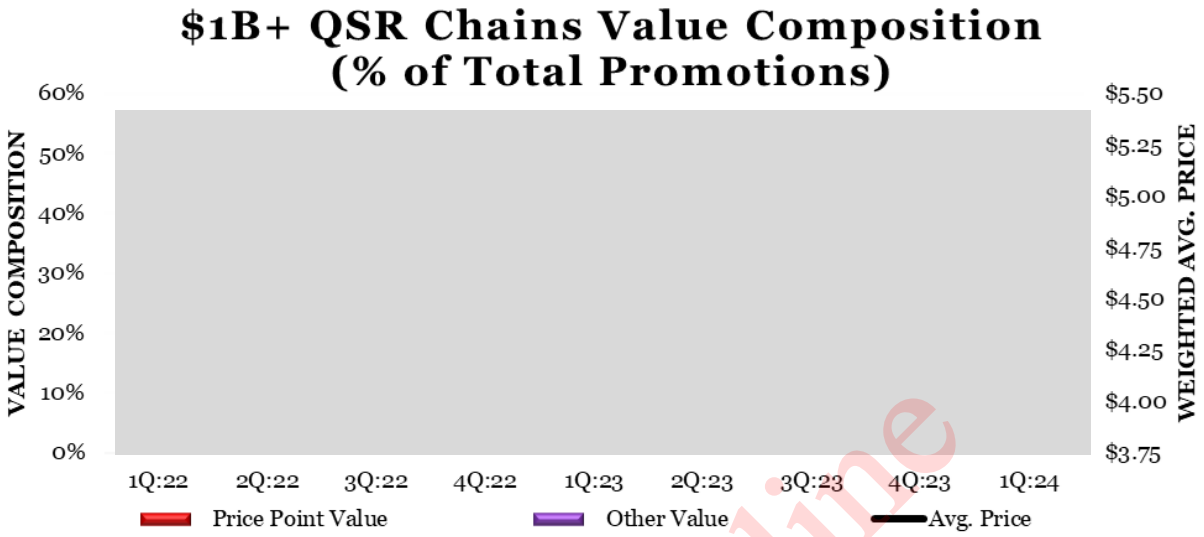
Chain	2019	2020	2021	2022	2023	% Change '23/'19	% Change '23/'22
Dairy Queen							
Culver's							
Zaxby's							
Sonic Drive-In							
Whataburger							
Chick-fil-A							
Burger King							
Wendy's							
McDonald's							
Five Guys							
Jack in the Box							
Taco Bell							
Checkers/ Rally's							
Hardee's							
Del Taco							
Carl's Jr.							
Arby's							
Sandwich							
Firehouse Subs							
Jimmy John's							
Subway							
Jersey Mike's							
Sub-Sandwich							
Papa John's							
Domino's							
Pizza Hut							
Little Caesars							
Pizza							
Wingstop							
Popeyes							
Church's							
Bojangles'							
KFC							
Chicken							
Dutch Bros Coffee							
Tim Horton's							
Starbucks							
Dunkin'							
Krispy Kreme							
Coffee/Bakery							
QSR							

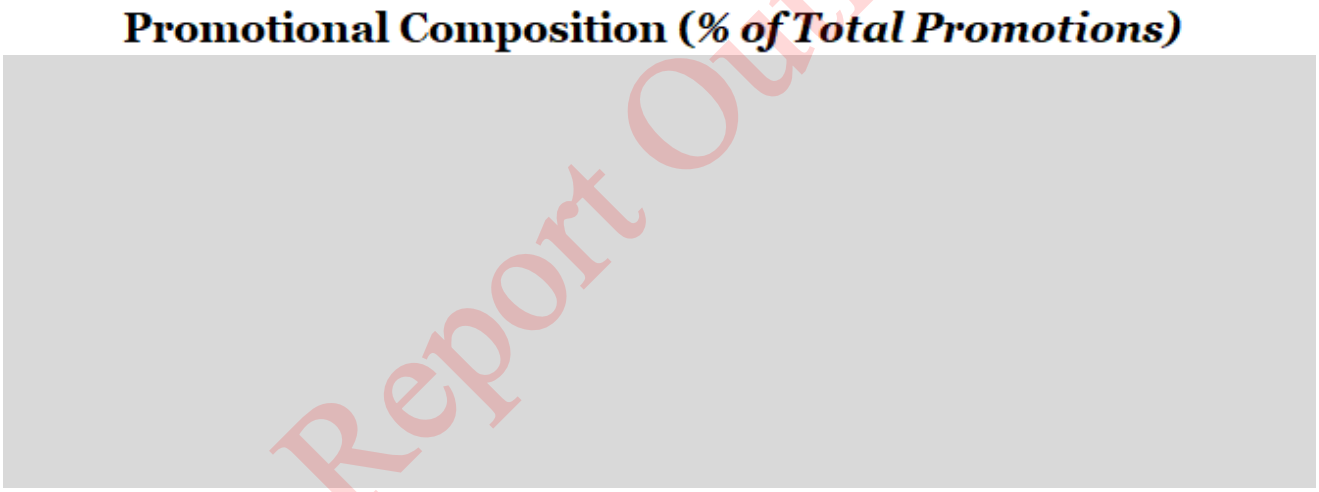
(1) Total menu item count excludes beverages (except shakes and specialty drinks which are counted as desserts).

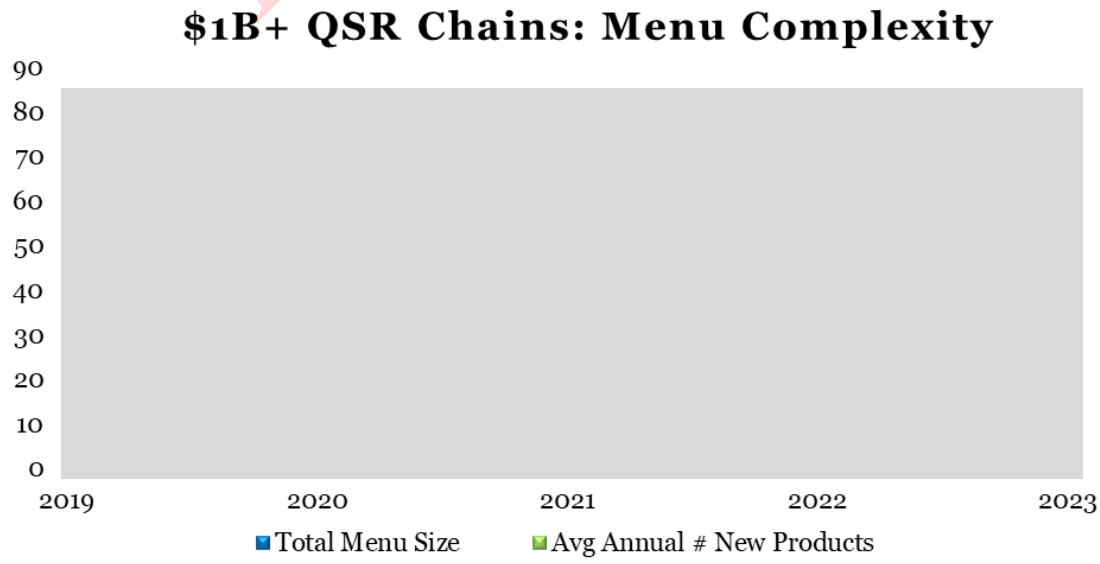
RR Estimate

Report Outline

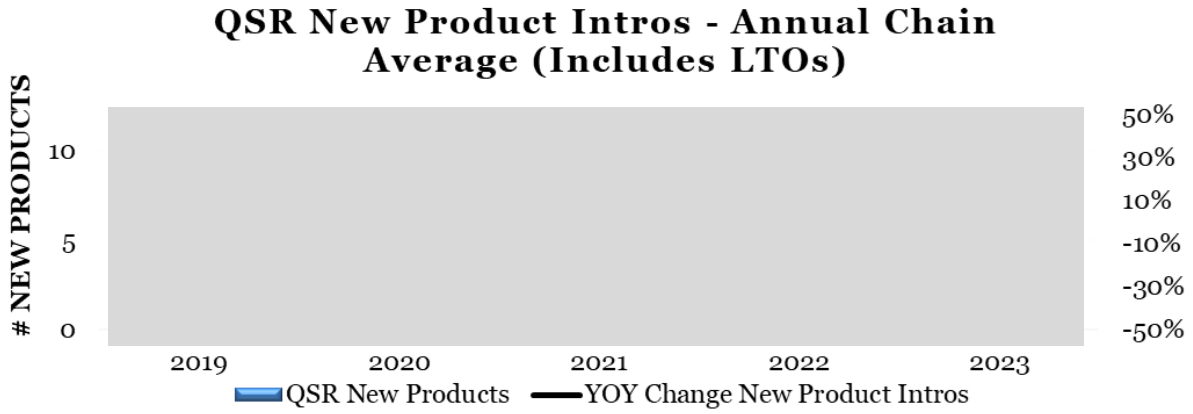
QSR Promotional Composition by Quarter







Report Outline

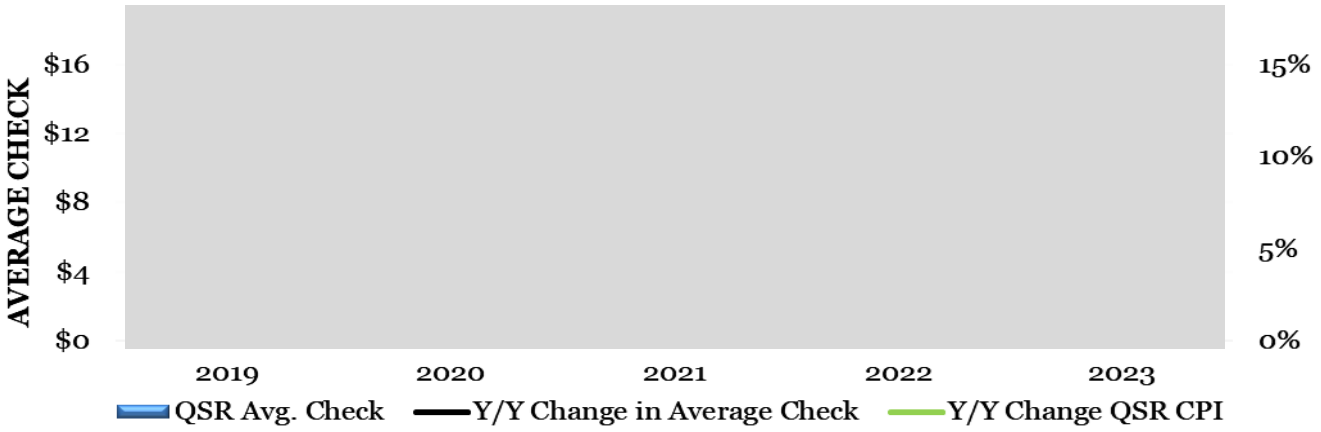


QSR New Product Summary - (Sorted by LTM 6/22/FYE '21 % Change)

Chain	2019	2020	2021	2022	2023	2023 New Products % of Total Menu	2023 Total Menu Items	% Change 23/'22
Jack in the Box								
Wendy's								
McDonald's								
Sonic Drive-In								
Taco Bell								
Culver's								
Dairy Queen								
Carl's Jr.								
Five Guys								
Zaxby's								
Chick-fil-A								
Burger King								
Arby's								
Hardee's								
Checkers/ Rally's								
Whataburger								
Sandwich								
Jimmy John's								
Firehouse Subs								
Jersey Mike's								
Subway								
Sub-Sandwich								
Papa John's								
Little Caesars								
Domino's								
Pizza Hut								
Pizza								
KFC								
Church's								
Popeyes								
Wingstop								
Bojangles'								
Chicken								
Tim Horton's								
Starbucks								
Dunkin'								
Krispy Kreme								
Dutch Bros Coffee								
Coffee/Bakery								
QSR								

Report Outline

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



QSR Average Check - *Ranked by % Change '23/'22*

Chain	2019	2020	2021	2022	2023	% Change '23/'19	% Change '23/'22
Carl's Jr.							
Sonic Drive-In							
Arby's							
Burger King							
McDonald's							
Zaxby's							
Dairy Queen							
Five Guys							
Jack in the Box							
Del Taco							
Hardee's							
Wendy's							
Taco Bell							
Checkers/ Rally's							
Culver's							
Sandwich							
Jimmy John's							
Jersey Mike's							
Firehouse Subs							
Subway							
Sub-Sandwich							
Little Caesars							
Domino's							
Papa John's							
Pizza Hut							
Pizza							
Popeyes							
Bojangles'							
Church's							
KFC							
Wingstop							
Chicken							
Dunkin'							
Tim Horton's							
Starbucks							
Dutch Bros Coffee							
Krispy Kreme							
Coffee/Bakery							
QSR							

Blue shaded cells represent RR estimates

Report Outline

QSR 2023: Mix – Daypart, Digital & Off-Premise

QSR Daypart Sales Mix - 2023

	Daypart Sales Mix				Off Premise Sales Composition					Sales Channels	
Concept	Breakfast	Lunch	Dinner	Late Night/ Snack	Total Off-Premise	Drive-thru	Catering	Take-out	Delivery	Digital Orders	Credit/ Debit Mix
Arby's											
Burger King											
Carl's Jr.											
Dairy Queen											
Del Taco											
Hardee's											
Jack in the Box											
McDonald's											
Sonic Drive-In											
Taco Bell											
Wendy's											
Sandwich											
Firehouse Subs											
Jersey Mike's											
Jimmy John's											
Subway											
Sub-sandwich											
Domino's											
Little Caesars											
Papa John's											
Pizza Hut											
Pizza											
Bojangles'											
Church's											
KFC											
Popeyes											
Wingstop											
Chicken											
Dunkin'											
Dutch Bros Coffee											
Starbucks											
Coffee/Bakery											
QSR											

Blue Shaded Cells Represent RR Estimates

Report Outline

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FSR Menu Summary

Chain	Menu Size	% Change '23/'22	Average Check	% Change '23/'22	# New Products	% Change '23/'22	Value Promo Mix	% Change '23/22	New Product Focus	Promotion Cadence	Promotion Themes	Value Promotions	Permanent Value
Applebee's													
BJ's Restaurants													
Buffalo Wild Wings													
Cheesecake Factory													
Chili's Grill & Bar													
LongHorn													
Olive Garden													
Outback													
Red Lobster													
Red Robin													
T.G.I. Friday's													
Texas Roadhouse													
Casual													
Bob Evans													
Cracker Barrel													
Denny's													
Golden Corral													
IHOP													
Perkins													
Family													

Report Outline

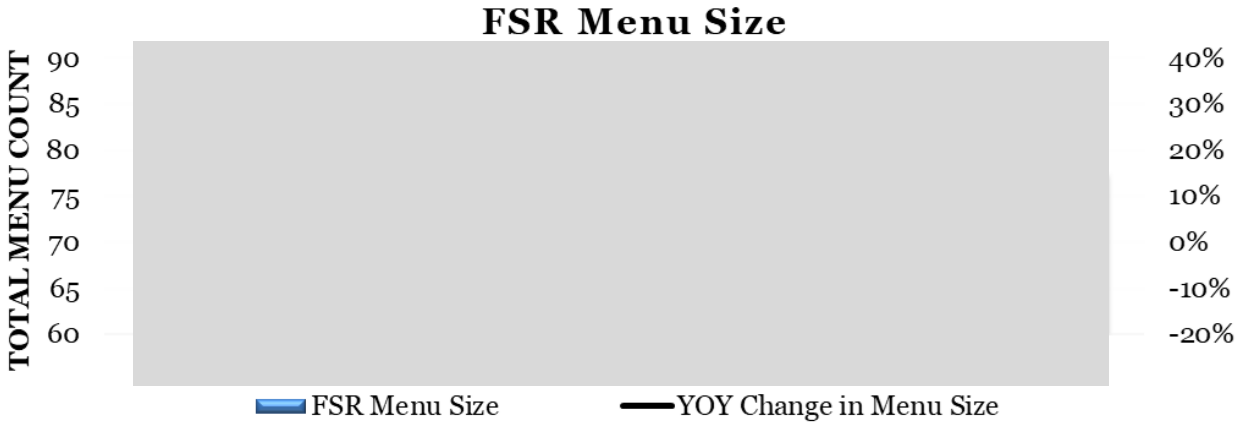
Restaurant Research®

FSR Menu Summary

Chain	Menu Size	% Change '23/'22	Average Check	% Change '23/'22	# New Products	% Change '23/'22	Value Promo Mix	% Change '23/22	New Product Focus	Promotion Cadence	Promotion Themes	Value Promotions	Permanent Value
Chipotle													
Corner Bakery Café													
Moe's Southwest Grill													
Panera Bread													
Qdoba													
Fast Casual													
FSR													

(1) Total menu count excludes drinks.
(2) New products include both permanent menu additions and limited time offers.

Report Outline



FSR Menu Size - *Ranked by % Change '23/'22* (1)

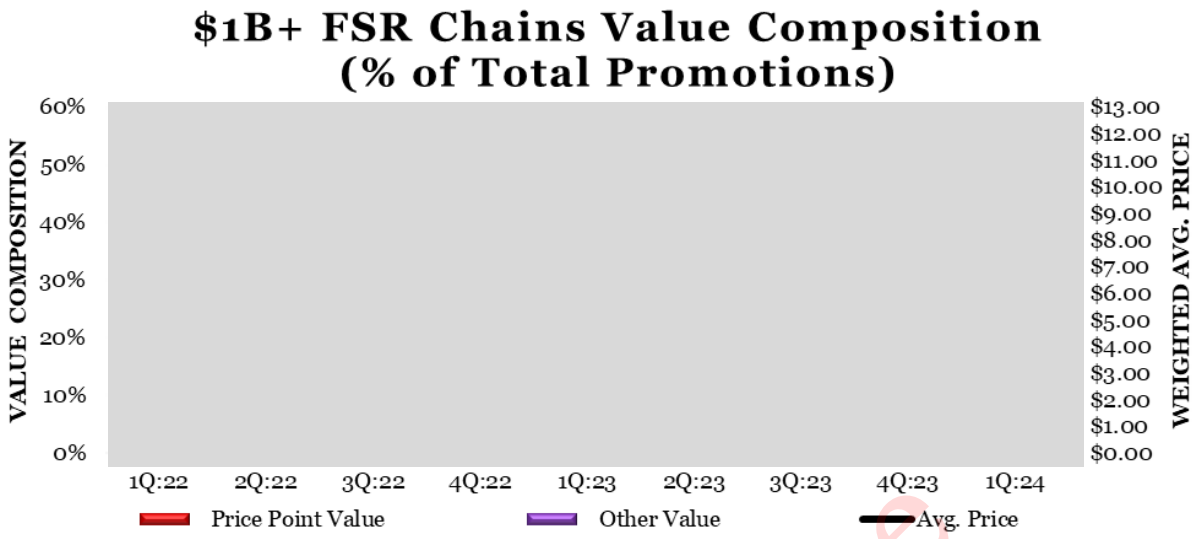
Chain	2019	2020	2021	2022	2023	% Change '23/'19	% Change '23/'22
Texas Roadhouse							
Red Lobster							
T.G.I. Friday's							
BJ's Restaurants							
Outback							
LongHorn							
Red Robin							
Chili's Grill & Bar							
Buffalo Wild Wings							
Applebee's							
Cheesecake Factory							
Olive Garden							
Casual							
Cracker Barrel							
Bob Evans							
IHOP							
Denny's							
Perkins							
Family							
Qdoba							
Corner Bakery Café							
Panera Bread							
Chipotle							
Moe's Southwest Grill							
Fast Casual							
FSR							

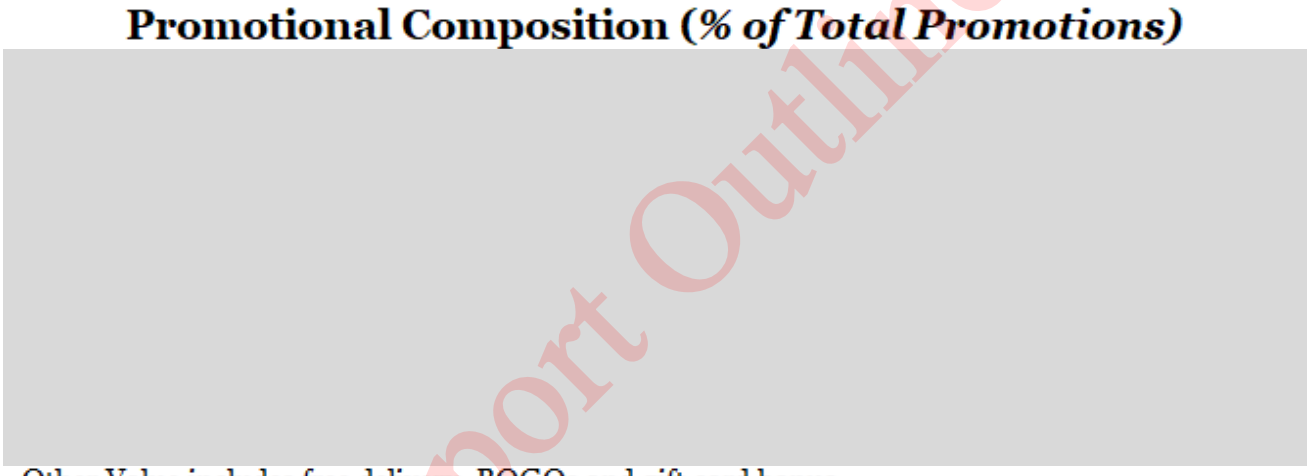
(1) Total menu item count excludes beverages (except shakes and frozen drinks which are counted as desserts).

Blue shaded cells represent RR estimates

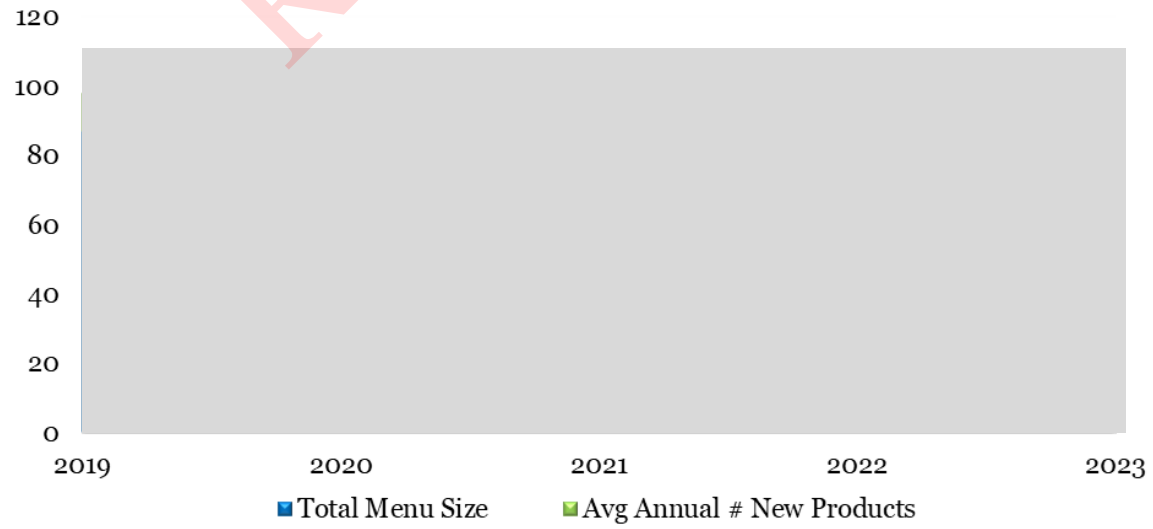
Report Outline

FSR Promotional Composition by Quarter

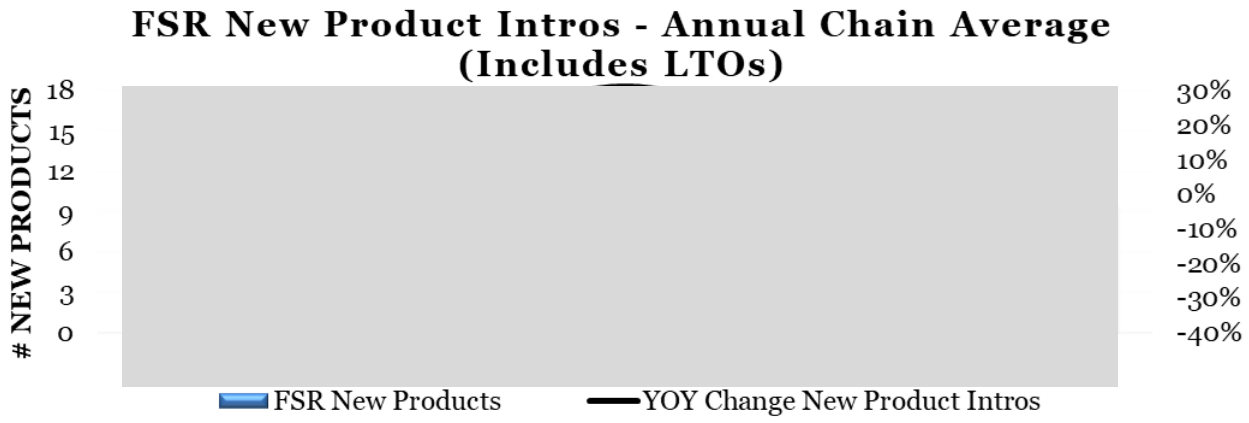




Other Value includes free delivery, BOGOs and gift card bonus.



Report Outline

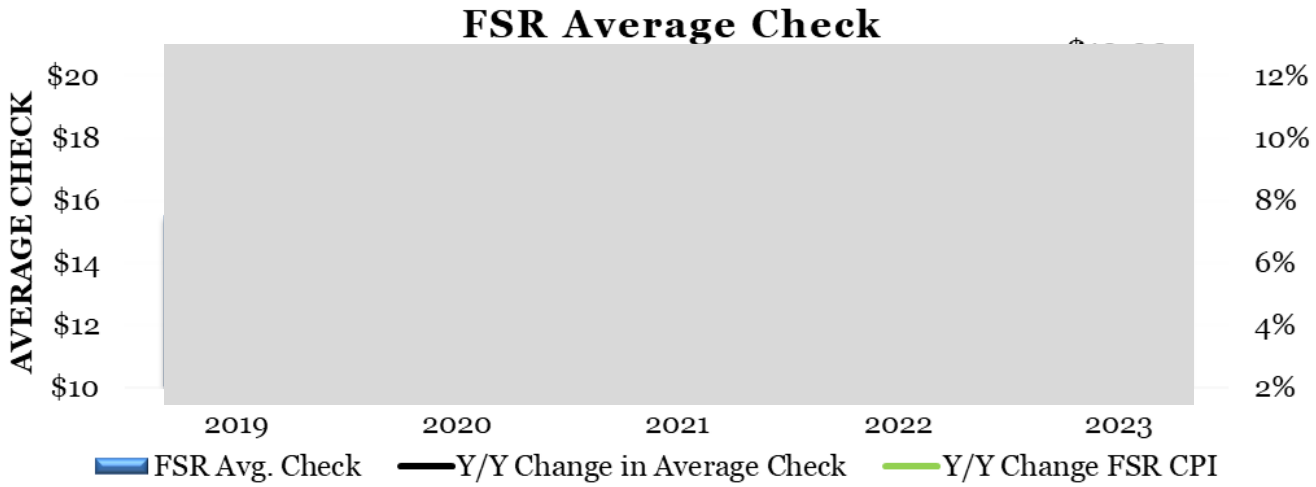


FSR New Product Summary - (Sorted by FYE '23/FYE '22 % Change)

Chain	2019	2020	2021	2022	2023	2023 New Products % of Total Menu	% Change 23/'22
Red Lobster							
Outback							
BJ's Restaurants							
Chili's Grill & Bar							
T.G.I. Friday's							
Texas Roadhouse							
LongHorn							
Red Robin							
Olive Garden							
Buffalo Wild Wings							
Cheesecake Factory							
Applebee's							
Casual							
IHOP							
Perkins							
Bob Evans							
Denny's							
Cracker Barrel							
Golden Corral							
Family							
Panera Bread							
Corner Bakery Café							
Qdoba							
Chipotle							
Moe's Southwest Grill							
Fast Casual							
FSR							

(1) Each flavor or variety counts as a separate new product. New products include both permanent

Report Outline



Report Outline

FSR Average Check - Ranked by % Change '23/'22

Chain	2019	2020	2021	2022	2023	% Change '23/'19	% Change '23/'22
Chili's Grill & Bar							
Olive Garden							
Red Robin							
LongHorn							
Buffalo Wild Wings							
BJ's Restaurants							
Texas Roadhouse							
Cheesecake Factory							
Outback							
Applebee's							
Casual							
Cracker Barrel							
Denny's							
IHOP							
Perkins							
Family							
Panera Bread							
Moe's Southwest Grill							
Qdoba							
Chipotle							
Fast Casual							
FSR							

Blue shaded cells represent RR estimates

FSR 2023: Mix – Daypart, Digital & Off-Premise

FSR Daypart Sales Mix - 2023

	Daypart Sales Mix					Off Premise Sales Composition					Sales Channels	
Concept	Breakfast	Lunch	Dinner	Late Night & Snack	Alcohol Mix	Total Off-Premise	Drive-Thru	Catering	Take-out	Delivery	Digital Orders	Credit/ Debit Mix
Applebee's												
Buffalo Wild Wings												
Cheesecake Factory												
Chili's Grill & Bar												
LongHorn												
Olive Garden												
Outback												
Red Robin												
Texas Roadhouse												
Casual												
Cracker Barrel												
Denny's												
IHOP												
Perkins												
Family												
Chipotle												
Panera Bread												
Qdoba												
Fast Casual												
FSR												

Blue shaded cells represent RR estimates

Report Outline

Restaurant Research®

Sandwich Menu Composition - 2023

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											
Del Taco											
Five Guys											
Hardee's											
Jack in the Box											
McDonald's											
Sonic Drive-In											
Taco Bell											
Wendy's											
Whataburger											
Zaxby's											
Sandwich											

Menu Composition as % of Total Menu Items

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											
Dairy Queen											
Del Taco											
Five Guys											
Hardee's											
Jack in the Box											
McDonald's											
Sonic Drive-In											
Taco Bell											
Wendy's											
Whataburger											
Zaxby's											
Sandwich											

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

Report Outline

Restaurant Research®

Sub-Sandwich Menu Composition - 2023

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

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									
Sub-Sandwich									

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

Report Outline

Restaurant Research®

Coffee/Bakery Menu Composition - 2023

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

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										
Dutch Bros Coffee										
Krispy Kreme										
Starbucks										
Tim Horton's										
Coffee/Bakery										

(*) Excludes prepacked drinks & snack items.

Report Online

Restaurant Research®

Pizza Menu Composition - 2023

Concept	Total Menu Items [1]	Apps/ Sides	Crust Options	Toppings	Specialty Pizzas	Sandwiches	Pasta/ Other	Desserts
Domino's								
Little Caesars								
Papa John's								
Pizza Hut								
Pizza								

Menu Composition as % of Total Menu Items

Concept	Total Menu Items	Apps/ Sides	Create Your Own Pizza [2]	Specialty Pizzas	Sandwiches	Pasta/ Other	Desserts
Domino's							
Little Caesars							
Papa John's							
Pizza Hut							
Pizza							

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

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

Restaurant Research®

Chicken Menu Composition - 2023

Concept	Total Menu Items [1]	Sides	Bone-in Chicken	Boneless & Wings	Sandwiches/ Wraps	Other / Breakfast	Salads	Desserts	Kid's Menu
Bojangles'									
Church's									
KFC									
Popeyes									
Wingstop									
Chicken									

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									
Chicken									

(*) Total menu item count excludes kids menu.

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Casual Dining Menu Composition - 2023

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

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												
BJ's Restaurants												
Buffalo Wild Wings												
Cheesecake Factory												
Chili's Grill & Bar												
LongHorn												
Olive Garden												
Outback												
Red Lobster												
Red Robin												
T.G.I. Friday's												
Texas Roadhouse												
Casual												

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

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Family Menu Composition - 2023

Concept	Total Menu Items [1]	Appetizers & Soup	Salads	Burgers	Chicken	Beef	Sandwiches/ Wraps	Seafood	Other	Breakfast	Desserts
Bob Evans											
Cracker Barrel											
Denny's											
IHOP											
Perkins											
Family											

Menu Composition as % of Total Menu Items

Concept	Total Menu Items	Appetizers & Soup	Salads	Burgers	Chicken	Beef	Sandwiches/ Wraps	Seafood	Other	Breakfast	Desserts
Bob Evans											
Cracker Barrel											
Denny's											
IHOP											
Perkins											
Family											

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

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New Product Calendar

Chain	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23
Sandwich												
Arby's												
Burger King												
Carl's Jr.												
Checkers/ Rally's												
Chick-fil-A												
Culver's												
Dairy Queen												
Del Taco												
Five Guys												
Hardee's												
Jack in the Box												
McDonald's												
Sonic Drive-In												
Taco Bell												
Wendy's												
Whataburger												
Zaxby's												
Sub-Sandwich												
Firehouse Subs												
Jersey Mike's												
Jimmy John's												
Subway												
Pizza												
Domino's												
Little Caesars												
Papa John's												
Pizza Hut												
Chicken												
Bojangles'												
Church's												
KFC												
Popeyes												
Wingstop												
Coffee/Bakery												
Dunkin'												
Krispy Kreme												
Starbucks												
Dutch Bros Coffee												
Tim Horton's												
Casual												
Applebee's												
BJ's Restaurants												
Buffalo Wild Wings												
Cheesecake Factory												

Report Outline

Restaurant Research®

New Product Calendar

Chain	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23
Chili's Grill & Bar												
Olive Garden												
Outback												
Red Lobster												
Red Robin												
T.G.I. Friday's												
Texas Roadhouse												
Family												
Bob Evans												
Cracker Barrel												
Denny's												
Golden Corral												
IHOP												
Fast Casual												
Chipotle												
Corner Bakery Café												
Panera Bread												
Qdoba												

Report Outline

Restaurant Research®

Restaurant Research Coverage

Concept Reports	Industry Data Reports
Applebee's	Restaurant Lending & 2nd Half Unit Valuations
Arby's	Ad Spending
Burger King	Menus & Promotions
Carl's Jr.	Unit Growth & Sales Analysis
Chili's Grill & Bar	Unit Economics
Church's	1st Half Unit Valuations & Lending Update
Denny's	New Build Costs & Franchise Fees
Domino's	Remodeling
Hardee's	
IHOP	**Databases & Special Reports**
Jack in the Box	RR Databook (Annual Data Summary 50+ Chains)
KFC	RR LTOverview (Monthly Promotions 50+ Chains)
McDonald's	FDD Library (40+ Chains)
Panera Bread	Concept Updates (Quarterly 20+ Public Chains)
Papa John's	Same Store Sales Database (Quarterly 25+ Chains)
Pizza Hut	New Store ROI Model
Popeyes	SBA Lending Database
Sonic Drive-In	
Subway	**www.ChainRestaurantData.com**
Taco Bell	
Wendy's	

Report Outline

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