Restaurant Research®

Building Bridges between Franchisees, Franchisors & Financiers

Menus & Promotions – 2025

Key Points

- The average menu item count for $1B+ *QSR* Chains expanded +5% in 2025 after flat results from 2021 to 2024.
- *FSR* average menu item count declined -1% after a slight uptick in 2024.
- The 2025 *QSR* average menu count is -11% under its 2014 peak & *FSR* is -22% under its 2012 peak.
- 12 *QSR* average new product intros/chain during LTM 9/25 was -3.3% lower than FY24 although 2x the 2020 – 2023 period.
- 13.2 *FSR* average new product intros/chain was flat after increasing from 7.5 in 2020.
- The average check growth rate for $1B+ chains continues to moderate as inflation cools.
- +3.3% *QSR* average check increase during 2024 was under the +4.4% limited service food-away-from-home CPI growth rate.
- +5.0% *FSR* average check growth exceeded +3.7% full service CPI growth.
- +29.2% *QSR* aggregate 5-year (2020 – 2024) average check growth rate exceeded the +27.9% CPI increase.
- +25.2% aggregate 5-year *FSR* increase was almost in-line with the comparable +24.8% CPI growth.
- *QSR* promotional value mix increased to 46.3% (of total promotions) during LTM 9/25 from 43.6% in 2024.
- *FSR* sharply lowered its promotional value mix to 40.8% during LTM 9/25 from 49.0% in 2024.

Report Outline

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

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Menu & Promotions Summary Table

	2019	2020	2021	2022	2023	2024	LTM 9/25
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

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QSR Menu Summary

Chain	Menu Size	% Change '25/'24	Average Check	% Change '24/'23	# New Products	% Change '25/'24	Value Promo Mix '25	% Change '25/24	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													

Report Outline

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QSR Menu Summary

Chain	Menu Size	% Change '25/'24	Average Check	% Change '24/'23	# New Products	% Change '25/'24	Value Promo Mix '25	% Change '25/24	New Product Focus	Promotion Cadence	Promotion Themes	Value Promotions	Permanent Value
Whataburger													
Zaxby's													
Sandwich													
Firehouse Subs													
Jersey Mike's													
Jimmy John's													
Subway													
Sub-Sandwich													
Domino's													
Little Caesars													
Papa John's													
Pizza Hut													
Pizza													

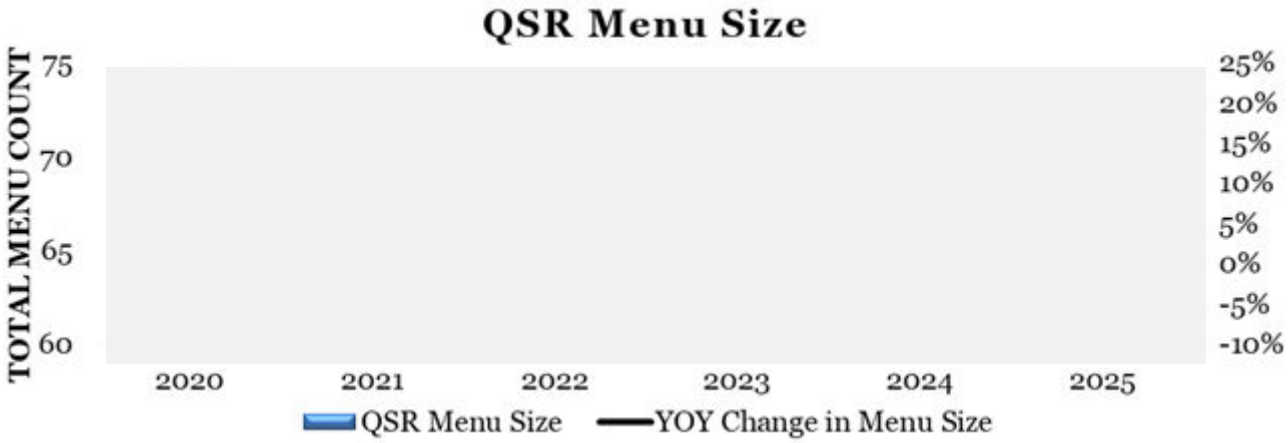
Report Outline

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QSR Menu Summary

Chain	Menu Size	% Change '25/'24	Average Check	% Change '24/'23	# New Products	% Change '25/'24	Value Promo Mix '25	% Change '25/24	New Product Focus	Promotion Cadence	Promotion Themes	Value Promotions	Permanent Value
Bojangles'													
Church's													
KFC													
Popeyes													
Wingstop													
Chicken													
Dunkin'													
7 Brew													
Dutch Bros Coffee													
Starbucks													
Tim Horton's													
Coffee/Bakery													

Report Outline



QSR Menu Size - *Ranked by % Change '25/'24* (1)

Chain	2021	2022	2023	2024	2025	% Change '25/'21	% Change '25/'24
Wendy's							
Five Guys							
Sonic Drive-In							
Checkers/ Rally's							
Jack in the Box							
McDonald's							
Hardee's							
Zaxby's							
Taco Bell							
Dairy Queen							
Chick-fil-A							
Burger King							
Culver's							
Whataburger							
Carl's Jr.							
Arby's							
Del Taco							
Sandwich							
Subway							
Jimmy John's							
Firehouse Subs							
Jersey Mike's							
Sub-Sandwich							

Report Outline

QSR Menu Size - *Ranked by % Change '25/'24* (1)

Chain	2021	2022	2023	2024	2025	% Change '25/'21	% Change '25/'24
Pizza Hut							
Little Caesars							
Domino's							
Papa John's							
Pizza							
Church's							
KFC							
Wingstop							
Bojangles'							
Popeyes							
Chicken							
Dutch Bros Coffee							
Dunkin'							
7 Brew							
Tim Horton's							
Starbucks							
Coffee/Bakery							
Qdoba							
Panera Bread							
Chipotle							
Moe's Southwest Grill							
Fast Casual							
QSR & Fast Casual							

(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



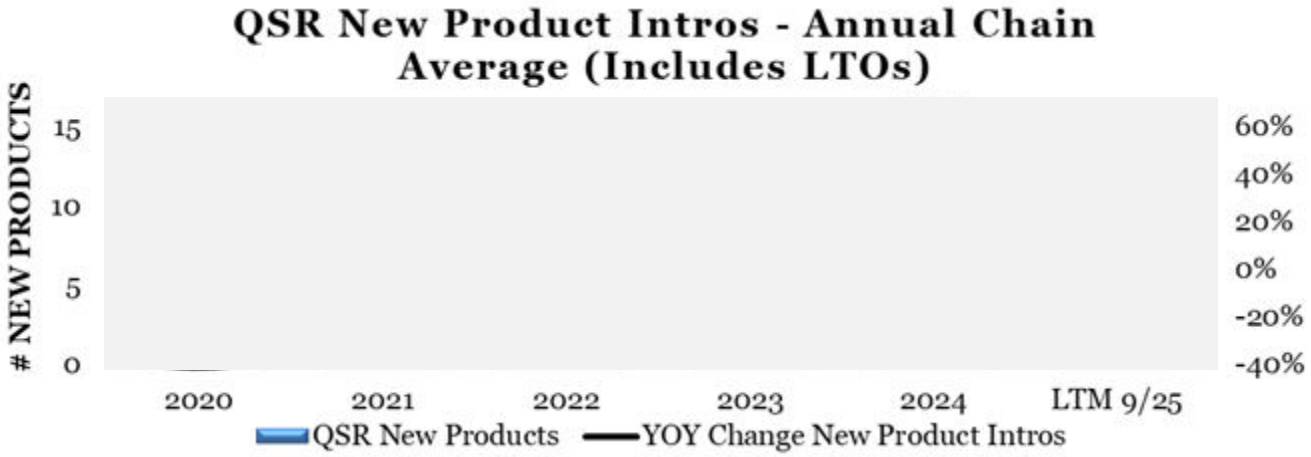
Promotional Composition (*% of Total Promotions*)

	3Q:23	4Q:23	1Q:24	2Q:24	3Q:24	4Q:24	1Q:25	2Q:25	3Q:25
QSR									
Price Point Value									
Other Value									
Total Value									
Premium									
New Products									
Avg. Price									
Same Store Sales									

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

Report Outline





QSR New Product Summary - (Sorted by LTM 9/25/FYE '24 % Change)

	Annual New Products & LTOs						2025 New Products	% Change
Chain	2020	2021	2022	2023	2024	LTM 9/25	% of Total Menu	25/'24
Culver's								
Hardee's								
Jack in the Box								
Taco Bell								
Wendy's								
Carl's Jr.								
Dairy Queen								
McDonald's								
Burger King								
Whataburger								
Sonic Drive-In								
Checkers/ Rally's								
Five Guys								
Arby's								
Zaxby's								
Chick-fil-A								
Sandwich								
Firehouse Subs								
Jersey Mike's								
Jimmy John's								
Subway								
Sub-Sandwich								

Report Outline

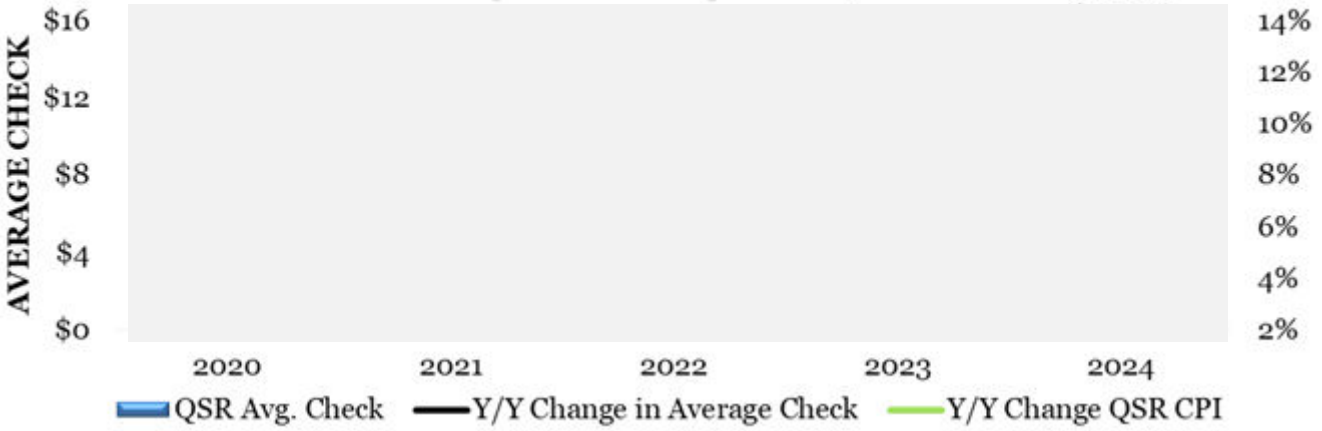
QSR New Product Summary - (Sorted by LTM 9/25/FYE '24 % Change)

	Annual New Products & LTOs						2025 New Products	% Change
Chain	**2020**	**2021**	**2022**	**2023**	**2024**	**LTM 9/25**	**% of Total Menu**	**25/'24**
Pizza Hut								
Little Caesars								
Domino's								
Papa John's								
Pizza								
Popeyes								
Wingstop								
Bojangles'								
KFC								
Church's								
Chicken								
7 Brew								
Dutch Bros Coffee								
Tim Horton's								
Dunkin'								
Starbucks								
Coffee/Bakery								
Moe's Southwest Grill								
Panera Bread								
Qdoba								
Chipotle								
Fast Casual								
QSR & Fast Casual								

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

Report Outline

QSR Average Check



QSR Average Check - *Ranked by % Change '24/'23*

Chain	2020	2021	2022	2023	2024	% Change '24/'20	% Change '24/'23
Burger King							
Taco Bell							
Arby's							
Zaxby's							
Sonic Drive-In							
McDonald's							
Del Taco							
Carl's Jr.							
Culver's							
Wendy's							
Jack in the Box							
Dairy Queen							
Five Guys							
Checkers/ Rally's							
Hardee's							
Chick-fil-A							
Whataburger							
Sandwich							
Jimmy John's							
Subway							
Firehouse Subs							
Jersey Mike's							
Sub-Sandwich							

Report Outline

QSR Average Check - *Ranked by % Change '24/'23*

Chain	2020	2021	2022	2023	2024	% Change '24/'20	% Change '24/'23
Little Caesars							
Pizza Hut							
Domino's							
Papa John's							
Pizza							
Wingstop							
Church's							
Bojangles'							
Popeyes							
KFC							
Chicken							
Dutch Bros Coffee							
7 Brew							
Tim Horton's							
Starbucks							
Dunkin'							
Coffee/Bakery							
Panera Bread							
Moe's Southwest Grill							
Qdoba							
Chipotle							
Fast Casual							
QSR & Fast Casual							

Blue shaded cells represent RR estimates

Report Outline

QSR 2024: Mix – Daypart, Digital & Off-Premise

QSR Daypart Sales Mix - 2024

Concept	Daypart Sales Mix				Off Premise Sales Composition					Sales Channels	
	Breakfast	Lunch	Dinner	Late Night/ Snack	Total Off-Premise	Drive-thru	Catering	Take-out	Delivery	Total Digital Orders	Credit/ Debit Mix
Arby's											
Burger King											
Carl's Jr.											
Dairy Queen											
Del Taco											
Five Guys											
Hardee's											
Jack in the Box											
McDonald's											
Sonic Drive-In											
Taco Bell											
Wendy's											
Zaxby'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'											
7 Brew											
Dutch Bros Coffee											
Starbucks											
Coffee/Bakery											
Chipotle											
Panera Bread											
Qdoba											
Fast Casual											
QSR & Fast Casual											

Blue shaded cells represent RR estimates

Report Outline

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FSR Menu Summary

Chain	Menu Size	% Change '25/'24	Average Check	% Change '24/'23	# New Products	% Change '25/'24	Value Promo Mix '25	% Change '25/24	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													

Report Outline

Restaurant Research®

FSR Menu Summary

Chain	Menu Size	% Change '25/'24	Average Check	% Change '24/'23	# New Products	% Change '25/'24	Value Promo Mix '25	% Change '25/24	New Product Focus	Promotion Cadence	Promotion Themes	Value Promotions	Permanent Value
Outback													
Red Robin													
Texas Roadhouse													
Casual													
Cracker Barrel													
Denny's													
Golden Corral													
IHOP													
Perkins													
Family													
FSR													

Report Outline

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



FSR Average Check - Ranked by % Change '24/'23

Chain	2020	2021	2022	2023	2024	% Change '24/'20	% Change '24/'23
Chili's Grill & Bar							
LongHorn							
BJ's Restaurants							
Buffalo Wild Wings							
Applebee's							
Red Robin							
Texas Roadhouse							
Outback							
Olive Garden							
Cheesecake Factory							
Casual							
IHOP							
Denny's							
Cracker Barrel							
Family							
FSR							

Blue shaded cells represent RR estimates

Report Outline

FSR Promotional Composition by Quarter

$1B+ FSR Chains Value Composition (% of Total Promotions)



Promotional Composition (*% of Total Promotions*)

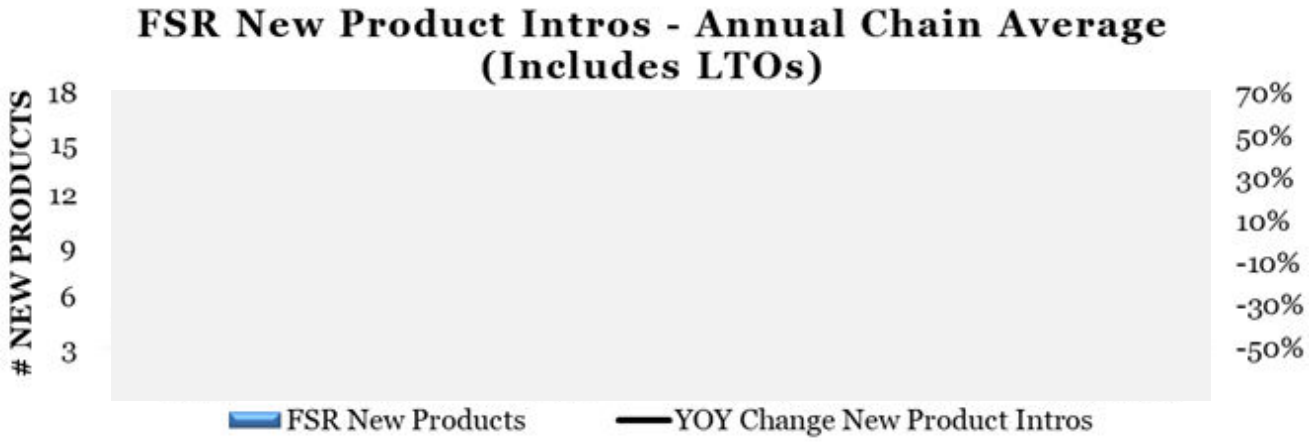
	3Q:23	4Q:23	1Q:24	2Q:24	3Q:24	4Q:24	1Q:25	2Q:25	3Q:25
FSR									
Price Point Value									
Other Value									
Total Value									
Premium									
New Products									
Avg. Price									
Same Store Sales									

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

Report Outline

$1B+ FSR Chains: Menu Innovation





FSR New Product Summary - (Sorted by TTM 9/25/FYE '24 % Change)

Chain	Annual New Products & LTOs 2020	2021	2022	2023	2024	LTM 9/25	2025 New Products % of Total Menu	% Change 25/'24
Red Robin								
Applebee's								
Chili's Grill & Bar								
BJ's Restaurants								
Buffalo Wild Wings								
Olive Garden								
Outback								
Texas Roadhouse								
LongHorn								
Cheesecake Factory								
Casual								
Golden Corral								
Perkins								
Denny's								
Cracker Barrel								
IHOP								
Family								
FSR								

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

Report Outline

FSR Average Check



FSR Average Check - Ranked by % Change '24/'23

Chain	2020	2021	2022	2023	2024	% Change '24/'20	% Change '24/'23
Chili's Grill & Bar							
LongHorn							
BJ's Restaurants							
Buffalo Wild Wings							
Applebee's							
Red Robin							
Texas Roadhouse							
Outback							
Olive Garden							
Cheesecake Factory							
Casual							
IHOP							
Perkins							
Denny's							
Cracker Barrel							
Family							
FSR							

Blue shaded cells represent RR estimates

Report Outline

FSR 2024: Mix – Daypart, Digital & Off-Premise

FSR Daypart Sales Mix - 2024

Concept	Daypart Sales Mix					Off Premise Sales Composition				Sales Channels	
	Breakfast	Lunch	Dinner	Late Night & Snack	Alcohol Mix	Total Off-Premise	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											
BJ's Restaurants											
Texas Roadhouse											
Casual											
Cracker Barrel											
Denny's											
Golden Corral											
IHOP											
Perkins											
Family											

Blue shaded cells represent RR estimates

Report Outline

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Sandwich Menu Composition - 2025

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.

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Sub-Sandwich Menu Composition - 2025

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.

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Pizza Menu Composition - 2025

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.

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Chicken Menu Composition - 2025

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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Coffee/Bakery Menu Composition - 2025

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

(*) Excludes prepacked drinks & snack items.

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Fast Casual Menu Composition - 2025

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

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									
Moe's Southwest Grill									
Panera Bread									
Qdoba									
Fast Casual									

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

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Casual Dining Menu Composition - 2025

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 Robin												
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 Robin												
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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New Product Calendar

Chain	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
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												

Restaurant Research®

New Product Calendar

Chain	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
						Sandwich						
Arby's												
Burger King												
Carl's Jr.												
Checkers/ Rally's												
Chick-fil-A												
Culver's												
Dairy Queen												
Del Taco												
Five Guys												

Report Outline

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New Product Calendar

Chain	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Hardee's												
Jack in the Box												
McDonald's												
Sonic Drive-In												
Taco Bell												
Wendy's												

Report Outline

Restaurant Research®

New Product Calendar

Chain	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
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												

Report Outline

Restaurant Research®

New Product Calendar

Chain	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Popeyes												
Wingstop												
Coffee/Bakery												
Dunkin'												
7 Brew												
Starbucks												
Dutch Bros Coffee												

Report Outline

Restaurant Research®

New Product Calendar

Chain	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Tim Horton's												
Casual												
Applebee's												
BJ's Restaurants												
Buffalo Wild Wings												
Cheesecake Factory												
Chili's Grill & Bar												
Olive Garden												
Outback												
Red Robin												
Texas Roadhouse												

Report Outline

Restaurant Research®

New Product Calendar

Chain	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Family												
Cracker Barrel												
Denny's												
Golden Corral												
IHOP												
Perkins												
Fast Casual												
Chipotle												
Moe's Southwest Grill												
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	
Taco Bell	
Wendy's	**www.ChainRestaurantData.com**

Visit www.chainrestaurantdata.com or contact us at (203) 829-9005 or info@ChainRestaurantData.com to:

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