

Restaurant Research's Industry Data Report Chain Menu & Promotions Update

12/10/08

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 35 chains as well as a summary of monthly promotions for 23 chains including new product introductions. Blank examples of the key exhibits follow below.

Change in QSR Menu Size

| Chain | Total Menu Items ⁽¹⁾ | | % Change |
|--------------------|---------------------------------|------|----------|
| | 2007 | 2008 | |
| Jack in the Box | | | |
| Carl's Jr. | | | |
| McDonald's | | | |
| Sonic | | | |
| Arby's | | | |
| Wendy's | | | |
| Quizno's | | | |
| Burger King | | | |
| Taco Bell | | | |
| Hardee's | | | |
| Subway | | | |
| Sandwich | | | |
| Papa John's | | | |
| Little Caesar's | | | |
| Pizza Hut | | | |
| Domino's | | | |
| Pizza | | | |
| Popeyes | | | |
| KFC | | | |
| Church's | | | |
| Chicken | | | |
| QSR Average | | | |

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

QSR New Products Summary (Sorted by % Change)

| Chain | Number of New Products ⁽¹⁾ | | | 08 New Products | % Change |
|--------------------|---------------------------------------|------|------|-----------------|----------|
| | 2006 | 2007 | 2008 | % of Total Menu | 08/'07 |
| Sandwich | | | | | |
| Subway | | | | | |
| Jack in the Box | | | | | |
| Taco Bell | | | | | |
| Burger King | | | | | |
| Sonic | | | | | |
| Carl's Jr. | | | | | |
| Wendy's | | | | | |
| Hardee's | | | | | |
| Quizno's | | | | | |
| Arby's | | | | | |
| McDonald's | | | | | |
| Average | | | | | |
| Pizza | | | | | |
| Pizza Hut | | | | | |
| Domino's | | | | | |
| Papa John's | | | | | |
| Average | | | | | |
| Chicken | | | | | |
| Church's | | | | | |
| Popeyes | | | | | |
| KFC | | | | | |
| Average | | | | | |
| QSR Average | | | | | |

Source: RR Monthly Promotional Tracker

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

Sample Menu Summary Exhibit

| Chain | Total Items | Value Menu ⁽¹⁾ | Breakfast ⁽²⁾ | Sides | Entrees ^(2,3) | Desserts & Shakes | Average Check | Breakfast | Lunch | Dinner | Late Night/ Snack | Dine-in | Take-out/ Drive-thru |
|-----------------|-------------|---------------------------|--------------------------|-------|--------------------------|-------------------|---------------|-----------|-------|--------|-------------------|---------|----------------------|
| Jack in the Box | | | | | | | | | | | | | |

Sample Promotional Summary Exhibit

| Chain | Jan-08 | Feb-08 | Mar-08 | Apr-08 | May-08 | Jun-08 | Jul-08 | Aug-08 | Sep-08 | Oct-08 | Nov-08 | Dec-08 |
|-------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---|
| Papa John's | | | | | | | | | | | | Big Movie Meal Deal tie-in with Dark Night movie promotion (2 lg. 1 topping pizzas - \$10 each) |

RR Clients

Includes major lenders, investors, major US restaurant chains, operators and industry consultants. Please check www.restaurantresearch.info 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 11 key Industry Data Topic reports. For more information please contact us at info@restaurantresearch.info or 860-274-4962.