Foodservice Landscape in the U.S.: Chain Limited-Service Restaurants

Description: Driven by incremental improvement in macroeconomic drivers, a brighter consumer outlook, aggressive operator menu innovation and LTO experimentation, quick-service (including fast casual) and snack and beverage restaurant sales are on track for moderate growth. But among consumers, price sensitivity is still top of mind: 68% of limited-service restaurant (LSR) users say low price would influence their decision to go to a fast food restaurant and 24% citing it as “most important.” Operators, also constrained by highly competitive grocery aisle pricing, will have limited pricing power even while they will continue to face guest traffic challenges into 2014. In an environment in which stealing share remains the key to growth, menu innovation and keeping up with broader consumer trends remains essential.

Foodservice Landscape in the U.S.: Chain Limited-Service Restaurants analyses the industry and consumer trends shaping this highly competitive environment, focusing on the quick-service, fast casual, and snack and beverage restaurant segments.

Key content includes:

- Studying the degree to which 26 different factors influence consumers' decisions to go to a “fast food restaurant” and which are the most important factors in that decision, with accompanying demographic analysis and industry responses/examples.
- Guest traffic analysis for quick-service restaurants and snack and beverage restaurants, with daypart and chain vs. independent share, including 2008-2013 QSR guest traffic trending for the segment's key consumer groups, and a strong focus on HH income trending by restaurant brand, including leading LSR beef/burger, chicken, pizza, and fast casual chains.
- Limited-service restaurant menu trending, focusing on menu item penetration by restaurant segment, including depth of menu items, limited-timed offers, mini-size menu items, top proteins, preparation methods, and beverages.
- Health and wellness trending, including calorie count trends and impact; healthy menu claim trends; clean food trends; kids' menu health; and healthful restaurant concepts to watch. We also present analysis of two consumer groups with divergent views regarding the importance of nutritional value, regular exercise, healthy diet and weight management. We gauge their restaurant, health and diet preferences, and the relationship to their restaurant brand choices.
- How technology trends are shaping the limited-service restaurant industry, with a focus on increasingly mobile consumers and emerging mobile payment technologies.
- Studying the impact of macro-economic drivers on limited-service restaurant industry growth, including an economic forecast through 2014, with supporting macroeconomic analysis; the effect of HH income and employment trends on limited-service restaurants; and the effect of consumer and commodity price trends on limited-service restaurants; with price trends and forecasts.
- A market size and forecast through 2015 for full-service restaurants, limited-service restaurants, cafeteria/buffets and snack/beverage establishments; same-store sales analysis of major brands by limited-service segment; and consumer restaurant spend trending, by segment.

The report also provides analysis of leading restaurant brands operating in four limited-service restaurant segments: snack and beverage, quick service, fast casual and cafeteria/buffet. For each brand, we assess competitive differentiation; growth strategy; menu development and trending; consumer food lifestyle consumer segmentation analysis; guest traffic trending, by demographic; and sales performance and outlook. Brands analyzed, by segment, include:

- Baskin-Robbins, Dunkin' Donuts, Jamba Juice, Starbucks
- Burger King, Chick-fil-A, KFC, McDonald's, Pizza Hut, Sonic, Wendy's
- Chipotle Mexican Grill and Qdoba
- Old Country Buffet

Contents:

Chapter 1: Executive Summary
Report Scope
Share of stomach: limited-service restaurant sales analysis
Limited-service restaurant macroeconomic analysis
Limited-service restaurant industry guest traffic trends
Limited-service restaurant menu trends
Limited-service restaurant health & wellness trends
Limited-service restaurant technology trends
Factors influencing the decision to go to a fast food restaurant
Leading snack and beverage restaurant chains
Leading quick-service restaurant chains
Leading fast casual restaurant chains
Leading limited-service cafeteria/buffet restaurant chains
Chapter 2: Share of Stomach Restaurant Sales Analysis
Summary analysis
Market size and forecast
Graph 2-1: Restaurant Sales, 2007-2015
Graph 2-2: Restaurant Performance Index, 2007-2015
Restaurant Performance Index trending positive
Graph 2-3: Restaurant Performance Index, 2007-2013
Same-store sales and guest traffic trends
Graph 2-4: Restaurant Industry Same-Store Sales and Customer Traffic Trends, 2007-2013
Guest traffic trends
The National Restaurant Association's take
NPD Group's CREST point of view
Table 2-1: Restaurant Industry Guest Traffic Share and Guest Traffic Growth, by Restaurant Segment, 2011-2013
Unit growth
Same-store sales trends, by brand and restaurant segment
Reading the graphs
Snack and beverage restaurant performance & outlook
QSR performance & outlook
Beef/burger
Chicken and Mexican
Pizza
Fast casual performance & outlook
Consumer limited-service restaurant spending trends
Food at home versus food away from home
Food at home spending accelerates
Table 2-2: HH Income & Expenditures, Food, Food at Home, Food Away from Home: 2007-2011 Growth
Table 2-3: HH Income & Expenditures, Food, Food at Home, Food Away from Home: 2007-2011 Share
Consumer restaurant spending trends
Limited-service share of spend increases
Table 2-4: Consumer Expenditures on Limited-Service and Full-Service Meals and Drinks: 2007-2011 Growth
Table 2-5: Consumer Expenditures on Limited-Service and Full-Service Meals and Drinks: 2007-2011 Share
Limited-service restaurant spending trends
Table 2-6: Consumer Expenditures on Limited-Service Meals, Non-Alcoholic Drinks & Alcoholic Drinks: 2007-2011 Growth
Table 2-7: Consumer Expenditures on Limited-Service Meals, Non-Alcoholic Drinks & Alcoholic Drinks: 2007-2011 Share
Limited-service restaurant spending trends, by HH Income
"Trading down" of consumer household incomes influences LSR spend
Graph 2-10: Household Number/Share & Household Limited-Service Restaurant Spend/Share, by HH Income: 2007 v. 2011
Table 2-8: Number of Households & Household Limited-Service Restaurant Spending, by HH Income: 2007 v. 2011
Limited-service restaurant spending trends: day part analysis
Table 2-10: Consumer Expenditures on Limited-Service Meals and Non-Alcoholic Drinks, by Daypart: 2007-
2011 Growth
Table 2-11: Consumer Expenditures on Limited-Service Meals and Non-Alcoholic Drinks, by Daypart: 2007-2011 Share
Breakfast spend trending by HH income
Graph 2-11: Household Number/Share & Household Limited-Service Restaurant Breakfast Spend/Share, by HH Income: 2007 v. 2011
Table 2-12: Number of Households & Household Limited-Service Restaurant Breakfast Spending, by HH Income: 2007 v. 2011
Lunch spend trending by HH income
Graph 2-12: Household Number/Share & Household Limited-Service Restaurant Lunch Spend/Share, by HH Income: 2007 v. 2011
Table 2-13: Number of Households & Household Limited-Service Restaurant Lunch Spending, by HH Income: 2007 v. 2011
Dinner spend trending by HH income
Table 2-14: Number of Households & Household Limited-Service Restaurant Dinner Spending, by HH Income: 2007 v. 2011
Snack spend trending by HH income
Graph 2-14: Household Number/Share & Household Limited-Service Restaurant Snack Spend/Share, by HH Income: 2007 v. 2011
Table 2-15: Number of Households & Household Limited-Service Restaurant Snack Spending, by HH Income: 2007 v. 2011
Chapter 3: Limited-Service Restaurant Macroeconomic Analysis
Summary analysis
The Big Picture: Moderate economic growth
Continued gradual rates of improvement expected
Graph 3-1: Unemployment, GDP & Inflation Forecast, 2013-2015
Supported by consumer confidence and employment gains
Graph 3-2: Monthly Unemployment Rate & Consumer Confidence, 2007-2013
Supported by wealth and debt trends
Household wealth continues to rebound
Wealth bedrocks follow two different paths
Stock market doubles in value
Home prices remain depressed but gains noted
Graph 3-3: Wealth Effect: Wilshire 5000 and Case-Shiller Index: 2007-2013
And households see almost 40% gain in real estate value
Graph 3-4: Wealth Effect: Household Net Worth and Mortgage Equity: 2007-2013
Improving consumer debt picture: total consumer debt down by 12%
Graph 3-5: Consumer Debt Balance and Its Composition: Q2 2006-Q2 2013
Skyrocketing student loan debt; lower credit card and mortgage debt
Table 3-1: Consumer Debt Balance, by Type: Amounts, Share & Year-Over-Year Comparisons: Q2 2007-Q2 2013
How to play continuing economic improvement
Addressing Millenials challenges
Influence of HH income trends on limited-service restaurants
Economic recovery bypasses lower-income restaurant consumer
$150K+ income household growth explodes
Middle class shrinks and low-income group rises
Table 3-2: 2009 vs. 2013 HH Income Segment Comparison, by Number of Households & Percentage Change
Additional context
Graph 3-6: HH Income Trends, by Income Segment: Number of Households & Percentage Share: July 2006 – July 2013
Influence of employment trends on limited-service restaurants
Rise in the unemployment rate results in lower restaurant engagement
Too many part-time jobs, not enough full-time jobs
Reliance on restaurant extreme affordability
Graph 3-7: Full-Time, Part-Time & Total Employment: January 2007 - July 2013
Table 3-3: Full-Time, Part-Time & Total Employment: Number, Share & Year-Over-Year Comparisons: July 2007 - July 2013
Demographic trouble spots persist
Trouble areas & restaurant industry ramifications
Table 3-4: National Employment Rate, by Demographic, w/ Year Year-Over-Year Comparisons: July 2007- July 2013
Food price outlook
Ask McDonald’s: Food at home index keeps menu pricing in check
Graph 3-8: Food at Home vs. Food away from Home Price Trends, 2007-2013
Food at home prices grow at meager rate
Graph 3-9: Food at Home & Alcoholic Beverages at Home, 2007-2013
Limited-service restaurant price increases track overall inflation rate
Graph 3-10: Food & Alcoholic Beverages Away from Home, Full-Service & Limited-Service Meals/Snacks Price Trends, 2007-2013
Wholesale food and beverage price trends
Where we've been
Table 3-5: Producer Price Index, by Food and Beverage Type, w/ Year-Over-Year Comparisons: 2007-2013
Where we're going
Table 3-6: Livestock, Dairy, and Poultry Price Outlook: 2012-2014
Chapter 4: Limited-Service Restaurant Industry Guest Traffic Trends
Summary analysis
Guest traffic volume and share analysis
Quick-service restaurant guest traffic volume
Daypart and chain/independent status
Graph 4-1: Quick-Service Restaurant Guest Traffic Share, by Daypart and Chain/Independent Status: 2013
Key demographics
Table 4-1: Quick-Service Restaurant Guest Traffic Volume Comparisons, by Demographic: 2013
Guest traffic volume: daypart and chain/independent status, by demographic
Table 4-2: Quick-Service Restaurant Guest Traffic Volume Comparisons by Daypart and Chain Status, by Demographic: 2013
Key demographic guest visit drivers: detailed analysis
Guest traffic frequency in decline
Table 4-3: Limited-Service Restaurant Monthly & High-Frequency Use by LSR Segment: 2008-2013
18-24s: more economically pressed, but visits are up
Table 4-4: 2013 Monthly & High-Frequency Use by LSR Segment among 18-24s, w/ 2008-2013 Usage Share Change
Blacks: visits are up, but trading up a looming issue?
Table 4-5: 2013 Monthly & High-Frequency Use by LSR Segment among Blacks, w/ 2008-201 Usage Share Change
After post-recession growth, Hispanic traffic trends suggest trouble afoot
Table 4-6: 2013 Monthly & High-Frequency Use by LSR Segment among Hispanics, w/ 2008-2013 Usage Share Change
Table 4-7: 2013 Monthly & High-Frequency Use by LSR Segment among <$50K HH Income Consumers, w/ 2008-2013 Usage Share Change
Table 4-8: 2013 Monthly & High-Frequency Use by LSR Segment among <$50K HH Income Consumers/Kids, w/ 2008-2013 Usage Share Change
Brand analysis: usage share by HH income
LSR beef/burger chains a mixed bag
Table 4-9: 2013 Limited-Service Beef/Burger Chain Usage Share by HH Income & Percentage Usage, by Restaurant Brand
Chick-fil-A draws a different consumer than other LSR chicken chains?
Table 4-10: 2013 Limited-Service Beef/Burger Chain Usage Share by HH Income & Percentage Usage, by Restaurant Brand
Lower- and middle-income consumers important to pizza chains
Table 4-11: 2013 Limited-Service Pizza Chain Usage Share by HH Income & Percentage Usage, by Restaurant Brand
Fast causal chains continue to be buoyed by higher-income patrons
Table 4-12: 2013 Fast Casual Chain Usage Share by HH Income & Percentage Usage, by Restaurant Brand
Snack and beverage guest traffic volume
Daypart and chain/independent status
Graph 4-2: Snack and Beverage Guest Traffic Share, by Daypart and Chain/Independent Status: 2013
Chapter 5: Limited-Service Restaurant Menu Trends
Summary analysis
Menu depth and variety: Reaching the breaking point?
Menu expansion at full throttle
Challenge—and Catch-22
Change in the wind
Table 5-1: Top QSR Burger Restaurants: Number of Items on the Menu, by Restaurant Brand: 2008-2012
LTOs provide opportunity for indulgent menu offerings
Regulatory exclusion a driver?
Graph 5-1: Quick-Service Restaurant Limited-Time Offer Menu Items: 2008-2012 Growth Trends
Going “mini” is still big
Table 5-2: Mini on the QSR Menu: 2010 versus 2012
Healthier proteins used in burgers
Table 5-3: Quick-Service Restaurant Burger Protein Penetration: 2010 versus 2012
Chicken sandwiches most popular, but pork is gaining traction
Table 5-4: Quick-Service Restaurant Sandwich Protein Penetration: 2010 versus 2012
Preparation methods suggest transition to premium space
Table 5-5: Quick-Service Restaurant Preparation Method Penetration: 2010 versus 2012
Growth in BFY beverages
Table 5-6: Quick-Service Restaurant Nonalcoholic Beverage Penetration: 2010 versus 2012
Chapter 6: Limited-Service Restaurant Health & Wellness Trends
Summary analysis
Health and wellness trends impact restaurant menus
Fast food is called out as contributing to the girth of Americans
Will posting calorie counts influence what consumers order?
Healthy menu claims
The growth of gluten free
Table 6-1: Quick-Service Restaurant Healthy Menu Claims: 2010 versus 2012
Clean food movement
Health on the kids’ menu
Concepts to watch: Health-focus
Energy Kitchen
Fresh Griller
Muscle Maker Grill
sweetgreen
Sushi Freak
Veggie Grill
Food Fit Consumers versus Non-Food Fit Consumers
Food Fit consumers
Not Food Fit consumers
Table 6-2: Food Fit and Not Food Fit Consumer Groups: Demographic Analysis
Food Fit members watch what they eat
Table 6-3: Food Fit and Not Food Fit Consumer Groups: Fast Food, Calories, and Nutrition Attitudes
Food Fit members over index in fast casual restaurant usage
Table 6-4: Food Fit and Not Food Fit Consumer Groups: Indexed Usage of Snack & Beverage, QSR, Fast Casual, and Limited-Service Family Restaurants
Snack and beverage brands align with health or indulgence
Table 6-5: Food Fit and Not Food Fit Consumer Groups: Indexed Usage of Baskin Robbins, Dunkin’ Donuts, Jamba Juice & Starbucks, by Frequency of Use
Wendy’s and Chick-fil-A meet the health-indulgent nexus
Table 6-6: Food Fit and Not Food Fit Consumer Groups: Indexed Usage of Burger King, Chick-fil-A, KFC, McDonald’s, Pizza Hut, Sonic and Wendy’s, by Frequency of Use
Panera and Chipotle find favor among Food Fit consumers
Table 6-7: Food Fit and Not Food Fit Consumer Groups: Indexed Usage of Chipotle Mexican Grill, Panera Bread & Qdoba, by Frequency of Use
Chapter 7: Limited-Service Restaurant Technology Trends
Summary analysis
Tech-savvy consumers demand the same from restaurants
Self-service kiosks are viable technology
Jamba Juice
Sheetz
Tablet opportunities—the next big thing
Stacked
McAlister’s Deli
Mobile scans are useful in reaching the tech consumer
Taco Bell
The Melt
Mobile apps allow for mobile payments and more
Dunkin’ Donuts
Starbucks
Pilot Flying J Travel Centers
Pizza Hut
Connecting to restaurant users via social media
Facebook use by snack & beverage restaurant brand
Jamba Juice
Starbucks
Table 7-1: Facebook Use in Last 30 Days and 16+ Times per Month, by Snack & Beverage Restaurant Brand
Facebook use by quick-service restaurant brand
Panda Express
Wingstop
Donatos Pizza
Table 7-2: Facebook Use in Last 30 Days and 16+ Times per Month, by Quick-Service Restaurant Brand
Facebook use by fast casual restaurant brand
Einstein Bros. Bagels
Chipotle
Table 7-3: Facebook Use in Last 30 Days and 16+ Times per Month, by Fast Casual Restaurant Brand
Mobile Segmentation Groups
Table 7-4: Mobile Segmentation Groups: Use of Snack & Beverage Restaurants, by Brand
Mobile segmentation by quick-service restaurant brand
Table 7-5: Mobile Segmentation Groups: Use of Quick-Service Restaurants, by Brand
Mobile segmentation by fast casual restaurant brand
Table 7-6: Mobile Segmentation Groups: Use of Fast Casual Restaurants, by Brand
Chapter 8: Factors Influencing the Decision to Use Fast Food Restaurants
Summary analysis
Fast food decision influencers
Price, quality, and convenience wield most influence in restaurant choice
Price is paramount
Value menu still an anchor
Loyalty/rewards programs a factor
Quality associations
Convenience is king
Menu development and marketing
Graph 8-1: Fast Food Restaurant Decision Influencers and Most Important Decision Influencers
Incentive-driven decision influencers
Lower-income groups, women and younger adults important demographics
Table 8-1: Fast Food Restaurant Price/Incentive-Driven Decision Influencers, by Demographic
Quality-driven decision influencers
Table 8-2: Fast Food Restaurant Quality-Driven Decision Influencers, by Demographic
Convenience-driven decision influencers
Table 8-3: Fast Food Restaurant Convenience-Driven Decision Influencers, by Demographic
Menu-driven decision influencers
Table 8-4: Fast Food Restaurant Menu-Driven Decision Influencers, by Demographic
Top 5 “most important” decision influencers
Table 8-5: Top 5 “Most Important” Fast Food Decision Influencers, by Demographic
Second five “most important” decision influencers
Table 8-6: Second 5 “Most Important” Fast Food Decision Influencers, by Demographic
Chapter 9: Snack & Beverage Restaurant Brand Analysis
Baskin-Robbins
Competitive differentiation: Flavor variety and innovation
Growth strategy: Getting back to business basics
Menu trends
Graph 9-1: Baskin-Robbins Entrée, Side, Dessert, Beverage & Appetizer Menu Share
Table 9-1: Baskin-Robbins Food and Beverage Menu Share, by Menu Item Type
Continuously changing
Consumer food lifestyle segmentation analysis
Graph 9-2: Baskin-Robbins Usage Frequency Food Segmentation Analysis
Guest traffic analysis
Graph 9-3: 2013 Guest Traffic Usage Frequency Analysis: Baskin Robbins
Sales performance and outlook
Sales trends
2012
2013
Table 9-2: Baskin Robbins 2008-2012 Same-Store Sales and Systemwide Sales Trends, w/ Quarterly Figures to 2013
Dunkin’ Donuts
Competitive differentiation
Brand loyalty that trumps competition?
Thanks to strong value proposition
And strong menu innovation
Growth strategy: Retail expansion
Menu trends: Moving beyond breakfast and beverages
Leveraging LTOs
Graph 9-4: Dunkin’ Donuts Entrée, Side, Dessert, Beverage & Appetizer Menu Share
Table 9-3: Dunkin’ Donuts Food and Beverage Menu Share, by Menu Item Type
Consumer food lifestyle segmentation analysis
Graph 9-5: Dunkin’ Donuts Usage Frequency Food Segmentation Analysis
Guest traffic analysis
Graph 9-6: 2011-2013 Guest Traffic Frequency Analysis: Dunkin’ Donuts
Sales performance and outlook
2012
2013
Table 9-4: Dunkin’ Donuts 2008-2012 Same-Store Sales and Systemwide Sales Trends, w/ Quarterly Figures to 2013
Jamba Juice
Competitive differentiation: A healthy lifestyle brand
KonaRed and KonaWellness
Growth strategy: Innovation of retail format
Menu trends
Speeding up the innovation pipeline
Menu options just right for kids
Table 9-5: Jamba Juice Kids’ Menu Items: 2013
Squeezing growth from launch of fresh juice platform
Graph 9-7: Jamba Juice Entrée, Side, Dessert, Beverage & Appetizer Menu Share
Table 9-6: Jamba Juice Food and Beverage Menu Share, by Menu Item Type
Consumer food lifestyle segmentation analysis
Graph 9-8: Jamba Juice Usage Frequency Food Segmentation Analysis
Guest traffic analysis
Graph 9-9: 2011-2013 Guest Traffic Frequency Analysis: Jamba Juice
Sales performance and outlook
Performance outlook
Table 9-7: Jamba Juice 2010-2012 Same-Store Sales & Location Trends
Starbucks
Competitive differentiation: Store experience
Growth strategy: Cross-channel development
Menu trends: Turning to tea
Menu trends: Addressing the food challenge
Graph 9-10: Starbucks Entrée, Side, Dessert, Beverage & Appetizer Menu Share
Table 9-8: Starbucks Food and Beverage Menu Share, by Menu Item Type
Table 9-9: Starbucks Selected Menu Item Introductions: 2013
Menu trends: tending to core beverage platform
Consumer food lifestyle segmentation analysis
Graph 9-11: Starbucks Usage Frequency Food Segmentation Analysis
Guest traffic analysis
Graph 9-12: 2011-2013 Guest Traffic Frequency Analysis: Starbucks
Sales performance and outlook
2012
2013
Outlook
Table 9-10: Starbucks 2008-2012 Revenue, Same-Store Sales, Sales Mix, & Location Trends
Chapter 10: Quick-Service Restaurant Brand Analysis

Burger King
Competitive Differentiation: Preparation method
Growth Strategy: refinance, image, menu, and marketing
Menu Trends: Something for everyone
Graph 10-1: Burger King Entrée, Side, Dessert, Beverage & Appetizer Menu Share
Table 10-1: Burger King Food and Beverage Menu Share, by Menu Item Type
Menu development
Tweaking price points and enhancing balance pays off
Seasonal emphasis
Consumer food lifestyle segmentation analysis
Graph 10-2: Burger King Usage Frequency Food Segmentation Analysis
Guest traffic analysis
Graph 10-3: 2011-2013 Guest Traffic Frequency Analysis: Burger King
Sales performance and outlook
Table 10-2: Burger King Sales Performance: 2010-13

Chick-fil-A
Competitive differentiation: Cow campaign and closed on Sunday
Religious affiliation
What's all the fuss about?
Sales growth leadership
Usage share by political affiliation remains steady
Graph 10-4: Chick-fil-A Usage Share, by Political Affiliation: 2011 versus 2013
Growth strategy: Celebrating retail expansion
Menu trends: Leveraging health
Graph 10-5: Chick-fil-A Entrée, Side, Dessert, Beverage & Appetizer Menu Share
Table 10-4: Chick-fil-A Food and Beverage Menu Share, by Menu Item Type
Consumer food lifestyle segmentation analysis
Graph 10-6: Chick-fil-A Usage Frequency Food Segmentation Analysis
Guest traffic analysis
Broader trends positive
Higher-frequency usage trends a trouble spot
Graph 10-7: 2011-2013 Chick-fil-A Usage Frequency Analysis: Chick-fil-A
Sales performance

KFC
Competitive differentiation: Family-style
Table 10-5: KFC Selected Bucket/Feast/Bites Menu Item Introductions: 2013
Growth strategy: Expanding demographic reach
Menu trends: Beyond the bucket
Graph 10-8: KFC Entrée, Side, Dessert, Beverage & Appetizer Menu Share
Table 10-6: KFC Food and Beverage Menu Share, by Menu Item Type
Distribution trends: catering up to bat
Consumer food lifestyle segmentation analysis
Graph 10-9: KFC Usage Frequency Food Segmentation Analysis
Guest traffic analysis: trending negative
Graph 10-10: 2011-2013 Guest Traffic Frequency Analysis: KFC
Sales performance: menu innovation may be reversing downward trend

McDonald's
Competitive differentiation: First mover advantage
Growth strategy: Modernize the menu and consumer experience
Menu trends: Expanding the beverage menu
Graph 10-11: McDonald's Entrée, Side, Dessert, Beverage & Appetizer Menu Share
Table 10-7: McDonald's Food and Beverage Menu Share, by Menu Item Type
Menu trends: beef, chicken, Dollar Menu, salads
Consumer food lifestyle segmentation analysis
Graph 10-12: McDonald's Usage Frequency Food Segmentation Analysis
Guest traffic analysis
Graph 10-13: 2011-2013 Guest Traffic Frequency Analysis: McDonald's
Sales performance and outlook
Table 10-8: McDonald's Global Company-Operated & Franchise Restaurant Count, Sales & Revenue: 2008-2013
Table 10-9: McDonald's U.S. Company-Operated & Franchise Restaurant Count, Sales & Revenue: 2010-2012
Pizza Hut
Competitive differentiation: Social interaction via digital media
Growth strategy: Innovation and value
Table 10-10: Pizza Hut Selected Bucket/Feast/Bites Menu Item Introductions: 2013
Menu trends
Graph 10-14: Pizza Hut Entrée, Side, Dessert, Beverage & Appetizer Menu Share
Table 10-11: Pizza Hut Food and Beverage Menu Share, by Menu Item Type
Wings, wings, wings
Consumer food lifestyle segmentation analysis
Graph 10-15: Pizza Hut Usage Frequency Food Segmentation Analysis
Guest traffic analysis
Graph 10-16: 2011-2013 Guest Traffic Frequency Analysis: Pizza Hut
Sales performance
2013 more difficult
Table 10-12: NPC International, Inc. Revenue, Comparable Store Sales and Sales by Occasion: 2010-2012
Sonic
Competitive differentiation: Beverage destination
Growth strategy: Strengthen marketing efforts
Menu trends: Deliver unique menu items and flavor profiles
1 million drink combinations
Graph 10-17: Sonic Entrée, Side, Dessert, Beverage & Appetizer Menu Share
Table 10-13: Sonic Food and Beverage Menu Share, by Menu Item Type
Product innovation across dayparts
Testing, testing
A bit of healthfulness
Consumer food lifestyle segmentation analysis
Graph 10-18: Sonic Usage Frequency Food Segmentation Analysis
Guest traffic analysis
Graph 10-19: 2011-2013 Guest Traffic Frequency Analysis: Sonic
Sales performance
2013 growth tapering?
Graph 10-14: Sonic Sales, Same-Store Sales and Location Growth Trends: 2010-2012
Wendy's
Competitive differentiation: Premium QSR
Table 10-15: Wendy's "Right Size, Right Price" Value Menu: 2013
Growth strategy: Brand revitalization
Menu trends: Unique burgers and sandwiches
Graph 10-20: Wendy's Entrée, Side, Dessert, Beverage & Appetizer Menu Share
Table 10-16: Wendy's Food and Beverage Menu Share, by Menu Item Type
Consumer food lifestyle segmentation analysis
Graph 10-21: Wendy's Usage Frequency Food Segmentation Analysis
Guest traffic analysis
Sales performance and outlook
Table 10-17: Wendy's Sales and Restaurant Unit Metrics: 2010-2012
Chapter 11: Fast Casual Restaurant Brand Analysis
Chipotle Mexican Grill
Competitive differentiation: Food culture
Growth strategy: Brand extension
Menu trends: Focus on alcoholic beverages
Sofritas rollout
Graph 11-1: Chipotle Mexican Grill Entrée, Side, Dessert, Beverage & Appetizer Menu Share
Table 11-1: Chipotle Mexican Grill Food and Beverage Menu Share, by Menu Item Type
Consumer food lifestyle segmentation analysis
Graph 11-2: Chipotle Mexican Grill Usage Frequency Food Segmentation Analysis
Guest traffic analysis
Graph 11-3: 2013 Guest Traffic Usage Frequency Analysis: Chipotle Mexican Grill
Sales performance: growth tapering, but still strong
Table 11-2: Chipotle Mexican Grill Revenue, Same-Store Sales, and Restaurant Unit Metrics: 2010-2012
Qdoba
Competitive differentiation: Breakfast
Growth strategy: Jettison underperforming units
Menu trends
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit
http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

- **Product Name:** Foodservice Landscape in the U.S.: Chain Limited-Service Restaurants
- **Web Address:** [http://www.researchandmarkets.com/reports/2860051/](http://www.researchandmarkets.com/reports/2860051/)
- **Office Code:** SCIS3BRT

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Quantity</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User:</td>
<td>USD 4995</td>
</tr>
<tr>
<td>Hard Copy:</td>
<td>USD 5395 + USD 58 Shipping/Handling</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterpriseswide:</td>
<td>USD 9990</td>
</tr>
</tbody>
</table>

* Shipping/Handling is only charged once per order.

Contact Information
Please enter all the information below in **BLOCK CAPITALS**

**Title:**

<table>
<thead>
<tr>
<th>Mr</th>
<th>Mrs</th>
<th>Dr</th>
<th>Miss</th>
<th>Ms</th>
<th>Prof</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>First Name:</th>
<th>Last Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email Address: *</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Title:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Organisation:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Postal / Zip Code:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Phone Number:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fax Number:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account number</td>
<td>833 130 83</td>
</tr>
<tr>
<td>Sort code</td>
<td>98-53-30</td>
</tr>
<tr>
<td>Swift code</td>
<td>ULSBIE2D</td>
</tr>
<tr>
<td>IBAN number</td>
<td>IE78ULSB98533083313083</td>
</tr>
<tr>
<td>Bank Address</td>
<td>Ulster Bank, 27-35 Main Street, Blackrock, Co. Dublin, Ireland.</td>
</tr>
</tbody>
</table>

If you have a Marketing Code please enter it below:

Marketing Code: ____________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World