

RR Same Store Sales & Economic Database

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Annual Data	Quarterly Data
Annual Chain Data RR Chain Sales Index Sort by Concept & Economic Data Annual Market Share	Quarterly Chain Data Sort by Concept & Economic Data Quarterly Market Share Monthly Sales

Report Outline

Annual \$1B+ Restaurant Chain Same Store Sales Data (y/y % Change)

Concept	2019 U.S. System Sales \$'000	Store Base (1)	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Applebee's												
BJ's Restaurants												
Buffalo Wild Wings												
Cheesecake Factory												
Chili's Grill & Bar (2)												
LongHorn (2)												
Olive Garden (2)												
Outback												
Red Robin												
T.G.I. Friday's (3,4)												
Texas Roadhouse												
Casual												
Bob Evans (2)												
Cracker Barrel (2)												
Denny's												
Golden Corral (4)												
IHOP												
Perkins (4)												
Family												
Chipotle												
Corner Bakery Café (4)												
Moe's Southwest Grill (4)												
Panera Bread (4)												
Qdoba												
Fast Casual												
Dunkin Donuts												
Krispy Kreme												
Starbucks (2)												
Tim Horton's												
Coffee/Bakery												
Bojangles'												
Church's												
KFC (8)												
Popeyes												
Wingstop												
Chicken												
Domino's												
Little Caesars												
Papa John's (6)												
Pizza Hut (6)												
Pizza												
Firehouse Subs (4)												
Jersey Mike's												
Jimmy John's												
Subway												
Sub-Sandwich												
Arby's												
Burger King (5)												
Carl's Jr. (4)												
Checkers/ Rally's												
Chick-fil-A (4)												
Culver's (4)												
Dairy Queen												
Five Guys												
Hardee's (4)												
Jack in the Box (4),(7)												
McDonald's												
Sonic Drive-In (2,4)												
Taco Bell (8)												
Wendy's (6)												
Whataburger (4)												
Zaxby's (4)												
Sandwich												
RR Same Store Sales Data for \$1B+ Chains vs. Government Industry Data												
\$1B+ Chain Total												
Total Restaurant Industry Sales												
Food Away from Home CPI												
\$1B+ FSR Chains												
Total FSR Sales												
FSR CPI												
\$1B+ QSR Chains												
Total QSR Sales												
QSR CPI												
Food at Home Sales Performance												
Grocery (ex. C-Stores) Sales												
Food at Home CPI												
C-Store (ex. Gas) Sales												
Key Industry Economic Benchmarks												
Per Capita Disposable Income (Current)												
Total Retail Sales												
GDP (Current)												
Unemployment Rate (Actual)												
Regular Gas Prices												

(1) Same store sales represent either system-wide "S" or company only "C". \$1B+ segment averages weighted by total chain system-wide sales.

(2) Reflects an estimate for annual same store sales based on an average of the four calendar quarters during the period.

(3) Company store average through FYE 2015 and systemwide estimate 2016 forward.

(4) Represents the change in average annual sales volume per unit, as concept does not report same store sales.

(5) Burger King switched from a June FYE to a December FYE in 2010. Same store sales results reflect both U.S. and Canada.

(6) Same store sales results reflect both U.S. and Canada for Wendy's (2008 forward), and Papa John's (2011 forward).

(7) Jack in the Box sales reflect system-wide results from 3Q:09 forward and company results prior to that.

(8) Yum Brands same store sales represent system-wide results from fiscal year 2007 forward and company results for prior periods.

(9) Yellow highlighted results are RR estimates.

\$1B+ Restaurant Chain Same Store Sales Index (*)

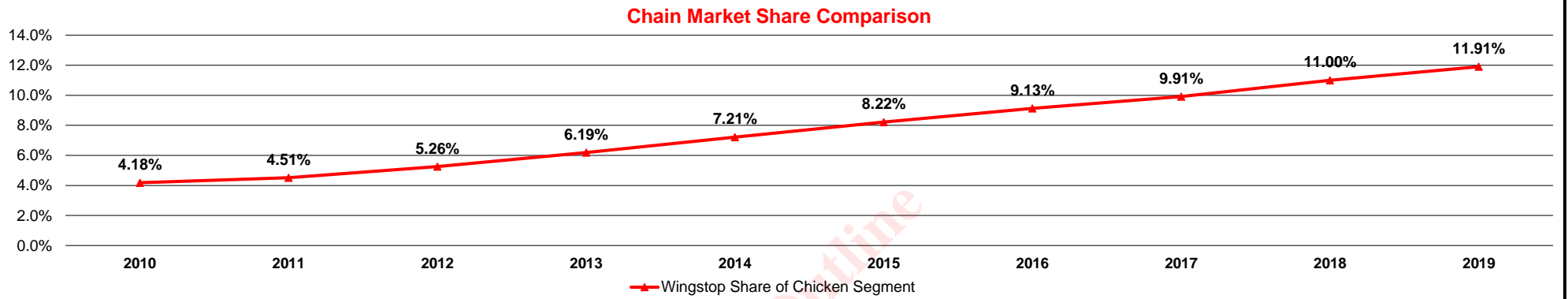
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	YTD Sep. '20	Low	High
Applebee's													
BJ's Restaurants													
Buffalo Wild Wings													
Cheesecake Factory													
Chili's Grill & Bar													
LongHorn													
Olive Garden													
Outback													
Red Robin													
T.G.I. Friday's													
Texas Roadhouse													
Casual													
Bob Evans													
Cracker Barrel													
Denny's													
Golden Corral													
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Church's													
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Popeyes													
Wingstop													
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Pizza													
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Arby's													
Burger King													
Carl's Jr.													
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Taco Bell													
Wendy's													
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Zaxby's													
Sandwich													
RR Same Store Sales Data for \$1B+ Chains vs. Government Industry Data													
\$1B+ Chain Total													
Total Restaurant Industry Sales													
Food Away from Home CPI													
\$1B+ FSR Chains													
Total FSR Sales													
FSR CPI													
\$1B+ QSR Chains													
Total QSR Sales													
QSR CPI													
Food at Home Sales Performance													
Grocery (ex. C-Stores) Sales													
Food at Home CPI													
C-Store (ex. Gas) Sales													
Key Industry Economic Benchmarks													
Per Capita Disposable Income (Current)													
Total Retail Sales													
GDP (Current)													
Regular Gas Prices													

(*) Base index at FYE 2010 = 100.

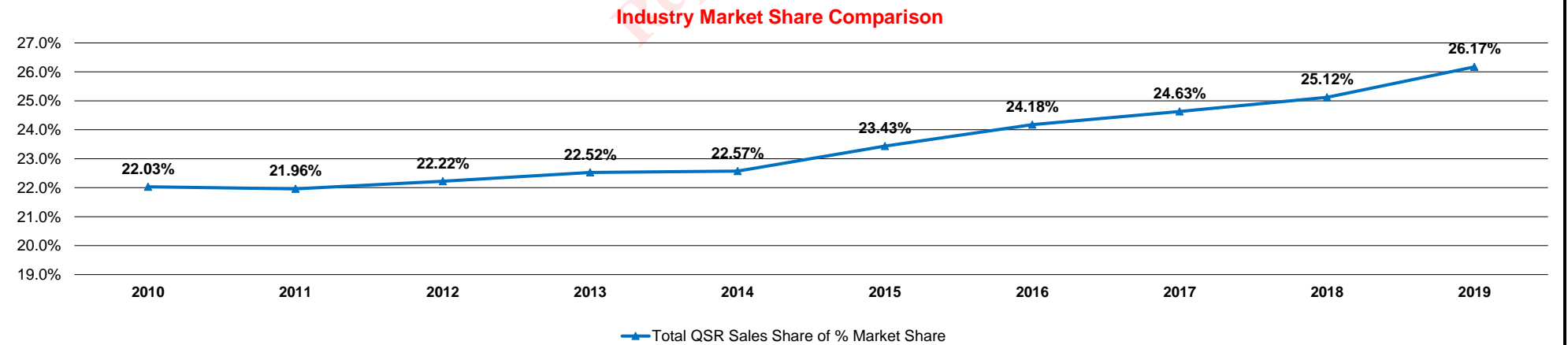
Annual Market Share Comparisons (\$ '000)

Click on Blue Drop-down List in Highlighted Cells to Add/Remove Data Sets

Scroll Down for Industry Market Share Options		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Select Chain from Drop Down List Below		Chain Market Share Comparison									
Wingstop		344,000	374,000	450,000	540,000	664,000	807,000	943,000	1,050,000	1,200,000	1,400,000
Chicken		8,229,277	8,295,193	8,560,000	8,718,000	9,205,000	9,823,000	10,323,000	10,592,000	10,906,000	11,759,000
% Market Share		4.18%	4.51%	5.26%	6.19%	7.21%	8.22%	9.13%	9.91%	11.00%	11.91%



Select Industry Data Set Numerator from Drop Down List Below		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Total QSR Sales		203,257,000	214,248,000	225,958,000	235,588,000	248,646,000	271,247,000	289,188,000	308,030,000	327,608,000	353,759,000
Select Industry Data Set Denominator from Drop Down List Below		Industry Market Share Comparison									
Total Food Sales (Restaurants, Grocery & C-Stores)		922,706,000	975,604,000	1,016,813,000	1,045,953,000	1,101,505,000	1,157,520,000	1,196,167,000	1,250,678,000	1,304,188,000	1,351,726,000
% Market Share		22.03%	21.96%	22.22%	22.52%	22.57%	23.43%	24.18%	24.63%	25.12%	26.17%



Quarterly \$1B+ Restaurant Chain Same Store Sales Data (y/y % Change)

Concept	2019 U.S. System Sales \$'000 ⁽¹⁾	Store Base ⁽²⁾	1Q:17	2Q:17	3Q:17	4Q:17	1Q:18	2Q:18	3Q:18	4Q:18	1Q:19	2Q:19	3Q:19	4Q:19	1Q:20	2Q:20	3Q:20
Applebee's		S															
BJ's Restaurants		C															
Buffalo Wild Wings		S															
Cheesecake Factory		C															
Chili's Grill & Bar ⁽³⁾		S															
LongHorn		C															
Olive Garden		C															
Outback		C															
Red Robin		S															
T.G.I. Friday's																	
Texas Roadhouse		S															
Casual		11															
Cracker Barrel		C															
Denny's		S															
IHOP		S															
Family		4															
Chipotle		C															
Fast Casual		3															
Dunkin Donuts		S															
Starbucks		C															
Tim Horton's		S															
Coffee/Bakery		4															
Bojangles'		S															
Church's		S															
KFC ⁽⁶⁾		S															
Popeyes		S															
Wingstop		S															
Chicken		5															
Domino's		S															
Papa John's ⁽⁵⁾		S															
Pizza Hut ⁽⁶⁾		S															
Pizza		3															
Burger King ⁽⁴⁾		S															
Jack in the Box ⁽³⁾		S															
McDonald's		S															
Sonic Drive-In		S															
Taco Bell ⁽⁶⁾		S															
Wendy's ⁽⁵⁾		S															
Sandwich		7															
RR Same Store Sales Data for \$1B+ Chains vs. Government Industry Data																	
\$1B+ Chain Total																	
Total Restaurant Industry Sales																	
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Per Capita Disposable Income (Current)																	
Total Retail Sales																	
GDP (Current)																	
Unemployment Rate (Actual)																	
Regular Gas Prices																	

(1) 2019 U.S. systemwide sales figures represent a preliminary estimate.

(2) Same store sales represent either system-wide "S" or company only "C". \$1B+ segment averages

(3) Chili's sales reflect system-wide results from 4Q:10 forward and company results prior to that; Jack in

(4) Burger King switched from a June FYE to a December FYE in 2010. Same store sales results reflect

(5) Same store sales results reflect both U.S. and Canada for Arby's (2017 forward), Wendy's (2008

(6) Yum Brands same store sales represent system-wide results from fiscal year 2007 forward and

(7) Highlighted results are RR estimates.

3Q:16	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2Q:16	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1Q:16	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4Q:15	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3Q:15	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2Q:15	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1Q:15	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4Q:14	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3Q:14	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2Q:14	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1Q:14	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4Q:13	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3Q:13	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2Q:13	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1Q:13	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4Q:12	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3Q:12	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2Q:12	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1Q:12	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4Q:11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3Q:11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2Q:11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1Q:11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4Q:10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Correlation Between Sales and Economic Statistic				#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

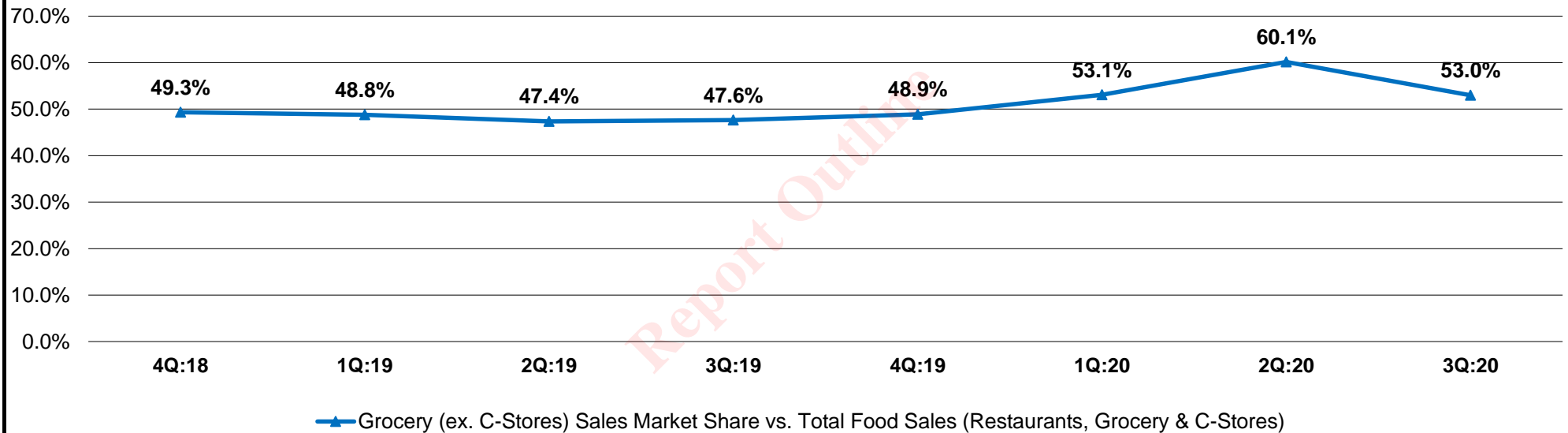
Report Outline

Quarterly Industry Market Share Comparisons (\$ '000)

Click on Blue Drop-down List in Highlighted Cells to Add/Remove Data Sets

	4Q:18	1Q:19	2Q:19	3Q:19	4Q:19	1Q:20	2Q:20	3Q:20
Select Industry Data Set Numerator from Drop Down List Below								
Grocery (ex. C-Stores) Sales	162,252,000	156,665,000	162,803,000	164,264,000	167,235,000	177,614,000	185,675,000	181,723,000
Select Industry Data Set Denominator from Drop Down List Below								
Total Food Sales (Restaurants, Grocery & C-Stores)	329,090,000	321,068,000	343,773,000	344,743,000	342,142,000	334,587,000	308,698,000	342,916,000
% Market Share	49.3%	48.8%	47.4%	47.6%	48.9%	53.1%	60.1%	53.0%

Quarterly Restaurant Sales and Economic Data Market Share Comparison



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	Church's	Denny's	Domino's
Hardee's	IHOP	Jack in the Box	KFC
McDonald's	Panera	Papa John's	Pizza Hut
Popeyes	Sonic	Subway	Taco Bell
TGI Friday's	Wendy's	Quarterly Concept Updates*	

Industry Benchmarking (50+ Chains)

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

* Only available as part of subscription.

FDD library for 40+ Chains

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