



# RR LTO Overview

**Leverage RR's extensive promotional analysis for competitive intelligence and to help forecast same-store-sales.**

## RR LTO Overview

### Promotional Value Mix, Price Points & New Products

<b>Casual</b>	<b>Applebee's</b> <b>BJ's Restaurants</b> <b>Buffalo Wild Wings</b> <b>Cheesecake Factory</b> <b>Chili's Grill &amp; Bar</b> <b>Long Horn</b> <b>Olive Garden</b> <b>Outback</b> <b>Red Robin</b> <b>Texas Roadhouse</b> <b>TGI Friday's</b>	<b>Five Guys</b> <b>Hardee's</b> <b>Jack in the Box</b> <b>McDonald's</b> <b>Sonic Drive-In</b> <b>Taco Bell</b> <b>Wendy's</b> <b>Whataburger</b> <b>Zaxby's</b>
		<b>Sub-sandwich</b>
		<b>Firehouse Subs</b> <b>Jersey Mike's</b> <b>Jimmy John's</b> <b>Subway</b>
<b>Family</b>	<b>Cracker Barrel</b> <b>Denny's</b> <b>Golden Corral</b> <b>IHOP</b> <b>Perkin's</b>	<b>Pizza</b>
		<b>Domino's</b> <b>Little Caesar's</b> <b>Papa John's</b> <b>Pizza Hut</b>
<b>Fast Casual</b>	<b>Chipotle</b> <b>Moe's Southwest Grill</b> <b>Panera Bread</b> <b>Qdoba</b>	<b>Chicken</b>
		<b>Bojangles'</b> <b>Church's</b> <b>KFC</b> <b>Popeyes</b> <b>Wingstop</b>
<b>Sandwich</b>	<b>Arby's</b> <b>Burger King</b> <b>Carl's Jr.</b> <b>Checkers/Rally's</b> <b>Chick-fil-A</b> <b>Culver's</b> <b>Dairy Queen</b>	<b>Coffee/Bakery</b>
		<b>Dunkin Donuts</b> <b>Krispy Kreme</b> <b>Starbucks</b> <b>Tim Horton's</b>

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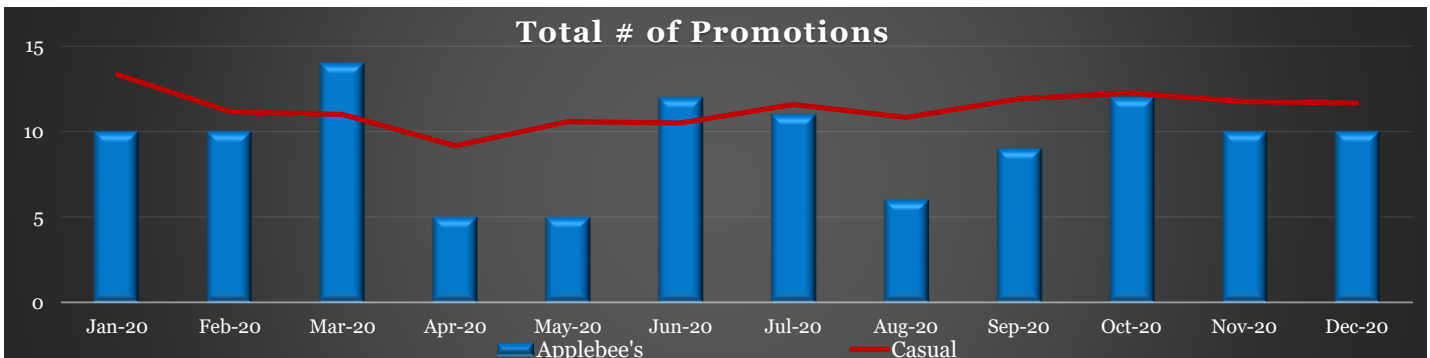
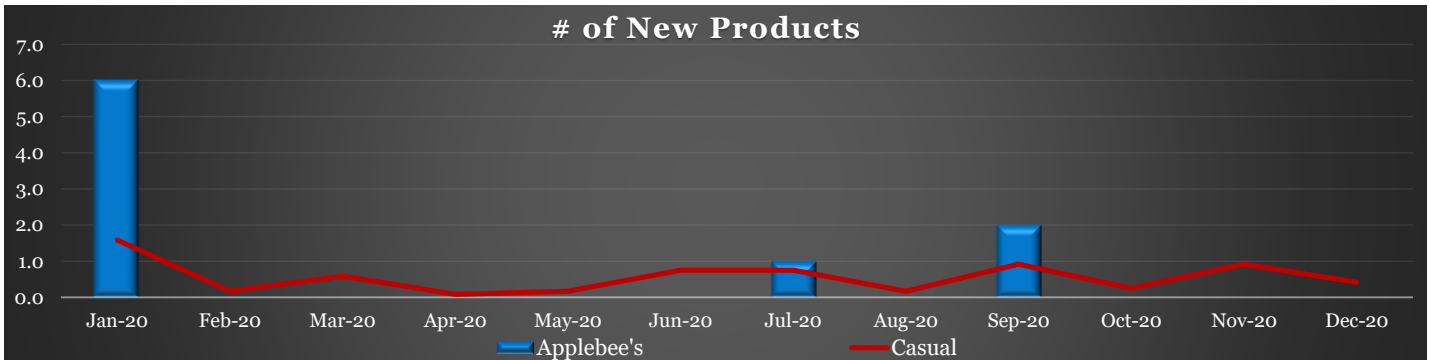
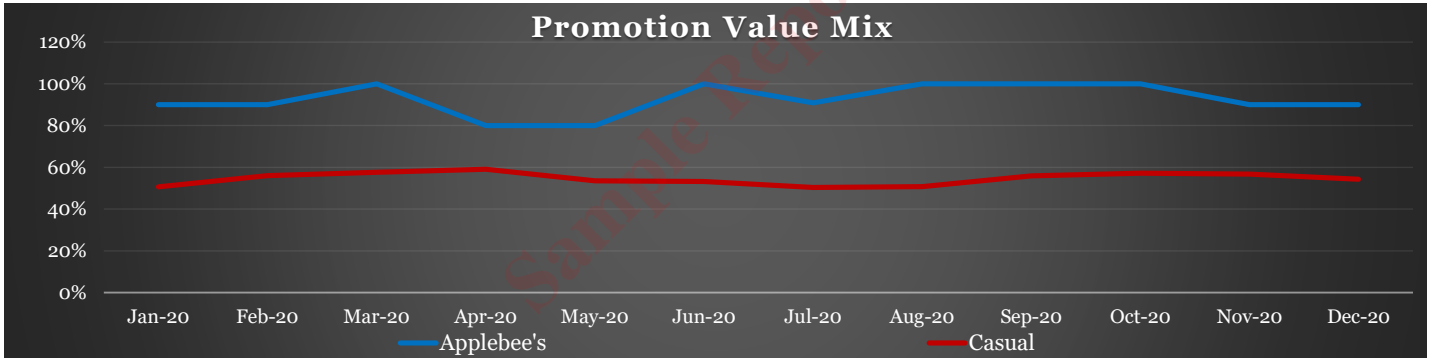
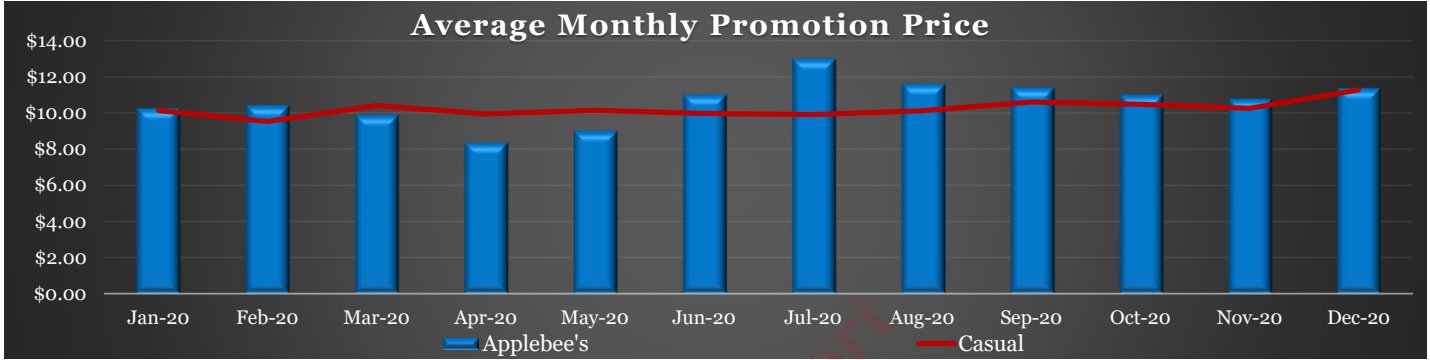
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## Casual Segment

	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	LTM Avg.
<b>Average Promotional Price Point</b>													
Applebee's	\$10.25	\$10.42	\$9.89	\$8.33	\$9.00	\$11.00	\$13.00	\$11.60	\$11.40	\$11.00	\$10.78	\$11.36	<b>\$10.67</b>
BJ's Restaurants	\$7.29	\$11.23	\$7.29	\$7.00	\$7.00	\$11.40	\$13.50	\$14.44	\$13.82	\$14.10	\$13.45	\$13.63	<b>\$11.18</b>
Buffalo Wild Wings	\$5.00	\$5.00	\$5.00	\$5.00	\$16.50	\$18.33	\$13.29	\$19.25	\$17.33	\$17.33	\$18.00	\$17.33	<b>\$13.11</b>
Cheesecake Factory	N/a	N/a	N/a	N/a	N/a	N/a	N/a	N/a	N/a	N/a	\$10.00	\$5.00	<b>\$7.50</b>
Chili's Grill & Bar	\$5.00	\$9.70	\$8.00	\$9.50	\$8.00	\$8.00	\$8.00	\$11.00	\$5.00	\$5.00	\$12.33	\$5.00	<b>\$7.88</b>
LongHorn	\$7.60	\$7.81	\$7.89	\$7.89	\$8.00	\$8.00	\$7.33	\$7.57	\$7.33	\$7.33	\$7.33	\$7.33	<b>\$7.62</b>
Olive Garden	\$7.75	\$9.76	\$8.50	\$8.50	\$12.14	\$12.33	\$12.00	\$6.00	\$6.43	\$5.91	\$5.44	\$6.00	<b>\$8.40</b>
Outback	\$17.00	\$12.66	\$14.60	\$13.67	\$14.60	\$11.00	N/a	N/a	N/a	N/a	\$9.00	\$9.00	<b>\$12.69</b>
Red Lobster	\$15.00	\$14.92	\$14.69	\$15.00	\$15.00	\$7.00	\$7.00	\$7.00	\$7.00	\$9.00	\$9.00	\$9.00	<b>\$10.80</b>
Red Robin	N/a	\$8.76	N/a	N/a	N/a	\$5.00	N/a	N/a	N/a	N/a	N/a	N/a	<b>\$6.88</b>
T.G.I. Friday's	\$8.18	\$9.78	\$10.33	\$10.27	\$18.33	N/a	\$8.33	\$5.00	\$5.00	\$5.00	N/a	N/a	<b>\$8.91</b>
<b>Casual</b>	<b>\$10.13</b>	<b>\$9.53</b>	<b>\$10.42</b>	<b>\$9.94</b>	<b>\$10.14</b>	<b>\$9.98</b>	<b>\$9.91</b>	<b>\$10.13</b>	<b>\$10.61</b>	<b>\$10.48</b>	<b>\$10.26</b>	<b>\$11.27</b>	<b>\$10.23</b>
<b>Promotion Value Mix</b>													
Applebee's	90.0%	90.0%	100.0%	80.0%	80.0%	100.0%	90.0%	100.0%	100.0%	100.0%	90.0%	90.0%	<b>92.6%</b>
BJ's Restaurants	40.9%	40.0%	71.4%	85.0%	86.7%	73.3%	78.3%	87.5%	77.8%	85.7%	60.0%	77.8%	<b>72.0%</b>
Buffalo Wild Wings	61.5%	53.8%	50.0%	66.7%	76.9%	66.7%	72.7%	75.0%	58.8%	56.3%	55.0%	57.1%	<b>62.5%</b>
Cheesecake Factory	0.0%	28.6%	40.0%	37.5%	66.7%	33.3%	20.0%	25.0%	37.5%	50.0%	22.2%	50.0%	<b>34.2%</b>
Chili's Grill & Bar	28.6%	44.4%	50.0%	35.7%	23.1%	20.0%	27.3%	11.1%	36.4%	42.9%	50.0%	50.0%	<b>35.0%</b>
LongHorn	56.3%	52.9%	57.1%	87.5%	54.5%	53.8%	50.0%	46.2%	50.0%	46.2%	0.0%	0.0%	<b>46.2%</b>
Olive Garden	50.0%	80.0%	76.9%	66.7%	66.7%	46.2%	38.9%	50.0%	64.3%	83.3%	100.0%	37.5%	<b>63.4%</b>
Outback	83.3%	60.0%	63.6%	37.5%	33.3%	30.0%	0.0%	0.0%	66.7%	66.7%	55.0%	28.6%	<b>43.7%</b>
Red Lobster	37.1%	43.8%	25.0%	86.7%	68.8%	73.7%	70.0%	72.7%	81.5%	70.4%	63.9%	82.6%	<b>64.7%</b>
Red Robin	0.0%	0.0%	10.0%	66.7%	33.3%	0.0%	0.0%	0.0%	0.0%	33.3%	0.0%	0.0%	<b>11.9%</b>
T.G.I. Friday's	78.3%	88.2%	57.1%	7.1%	26.7%	23.8%	15.8%	5.6%	4.5%	0.0%	35.7%	30.4%	<b>31.1%</b>
<b>Casual</b>	<b>50.6%</b>	<b>56.0%</b>	<b>57.6%</b>	<b>59.1%</b>	<b>53.5%</b>	<b>53.2%</b>	<b>50.4%</b>	<b>50.8%</b>	<b>55.9%</b>	<b>57.1%</b>	<b>56.7%</b>	<b>54.3%</b>	<b>54.6%</b>
<b># of New Products</b>													
Applebee's	6	0	0	0	0	0	1	0	2	0	0	0	<b>1</b>
BJ's Restaurants	8	0	0	0	0	6	0	0	0	0	1	0	<b>1</b>
Buffalo Wild Wings	0	0	4	0	0	0	0	1	4	0	0	0	<b>1</b>
Cheesecake Factory	0	0	0	0	0	0	1	0	0	0	0	0	<b>0</b>
Chili's Grill & Bar	0	1	1	0	0	0	0	0	0	0	0	0	<b>0</b>
LongHorn	2	0	1	0	0	0	0	0	0	0	0	0	<b>0</b>
Olive Garden	0	0	0	0	0	1	0	0	0	0	0	0	<b>0</b>
Outback	0	0	0	0	0	0	0	0	0	0	1	3	<b>0</b>
Red Lobster	1	1	1	0	0	0	0	0	1	2	4	1	<b>1</b>
Red Robin	2	0	0	0	0	0	0	0	0	0	1	0	<b>0</b>
T.G.I. Friday's	0	0	0	1	2	2	7	1	4	1	4	1	<b>2</b>
<b>Casual</b>	<b>1.6</b>	<b>0.2</b>	<b>0.6</b>	<b>0.1</b>	<b>0.2</b>	<b>0.8</b>	<b>0.8</b>	<b>0.2</b>	<b>0.9</b>	<b>0.3</b>	<b>0.9</b>	<b>0.4</b>	<b>0.6</b>
<b>Total # of Promotions</b>													
Applebee's	10	10	14	5	5	12	11	6	9	12	10	10	<b>10</b>
BJ's Restaurants	22	20	14	20	15	15	23	16	18	21	15	18	<b>18</b>
Buffalo Wild Wings	13	13	8	9	13	9	11	12	17	16	20	21	<b>14</b>
Cheesecake Factory	6	7	5	8	9	3	5	8	8	8	9	6	<b>7</b>
Chili's Grill & Bar	7	9	10	14	13	10	11	9	11	7	8	8	<b>10</b>
LongHorn	16	17	21	8	11	13	12	13	12	13	2	7	<b>12</b>
Olive Garden	16	10	13	6	6	13	18	22	14	12	6	16	<b>13</b>
Outback	6	10	11	8	6	10	1	2	3	3	20	7	<b>7</b>
Red Lobster	35	16	12	15	16	19	20	22	27	27	36	23	<b>22</b>
Red Robin	6	5	10	3	3	1	8	2	2	3	1	1	<b>4</b>
T.G.I. Friday's	23	17	14	14	30	21	19	18	22	25	14	23	<b>20</b>
<b>Casual</b>	<b>13.3</b>	<b>11.2</b>	<b>11.0</b>	<b>9.2</b>	<b>10.6</b>	<b>10.5</b>	<b>11.6</b>	<b>10.8</b>	<b>11.9</b>	<b>12.3</b>	<b>11.8</b>	<b>11.7</b>	<b>11.3</b>

## Applebee's

	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	LTM
<b>Average Promotional Price Point</b>													
Applebee's	\$10.25	\$10.42	\$9.89	\$8.33	\$9.00	\$11.00	\$13.00	\$11.60	\$11.40	\$11.00	\$10.78	\$11.36	\$10.67
Casual	\$10.13	\$9.53	\$10.42	\$9.94	\$10.14	\$9.98	\$9.91	\$10.13	\$10.61	\$10.48	\$10.26	\$11.27	\$10.23
<b>Promotion Value Mix</b>													
Applebee's	90.0%	90.0%	100.0%	80.0%	80.0%	100.0%	90.9%	100.0%	100.0%	100.0%	90.0%	90.0%	92.6%
Casual	50.6%	56.0%	57.6%	59.1%	53.5%	53.2%	50.4%	50.8%	55.9%	57.1%	56.7%	54.3%	54.6%
<b># of New Products</b>													
Applebee's	6	0	0	0	0	0	1	0	2	0	0	0	1
Casual	1.6	0.2	0.6	0.1	0.2	0.8	0.2	0.2	0.9	0.3	0.9	0.4	0.6
<b>Total # of Promotions vs. Segment Average</b>													
Applebee's	10	10	14	5	5	12	11	6	9	12	10	10	10
Casual	13.3	11.2	11.0	9.2	10.6	10.5	11.6	10.8	11.9	12.3	11.8	11.7	11.3



## Applebee's

Jul-20		Aug-20		Sep-20		Oct-20		Nov-20		Dec-20	
\$12.99 All You Can Eat (Double Crunch Shrimp; Signature Riblets; Boneless Wings)	TV	\$12.99 All You Can Eat (Double Crunch Shrimp; Signature Riblets; Boneless Wings)	TV	\$14.99 All You Can Eat (Shrimp; Riblets; Tenders)	TV	\$12.99 All You Can Eat (Boneless Wings; Riblets; Double Crunch Shrimp)	TV	\$12.99 All You Can Eat (Boneless Wings; Riblets; Double Crunch Shrimp)	TV	Add a Dozen Double Crunch Shrimp to any Steak Entree for \$1	TV
Irresist-A-Bowls (Homestyle Chicken Bowl; Southwest Chicken Bowl; Southwest Steak Bowl; Tex-Mex Shrimp Bowl)-\$7.99	TV	All Handcrafted Burgers-\$8.99		Add a Dozen Double Crunch Shrimp to any Steak Entree for \$1	TV	\$14.99 All You Can Eat (Riblets; Shrimp; Tenders)	TV	Add a Dozen Double Crunch Shrimp to any Steak Entree for \$1	TV	2 For \$20 w/Steak (Two Entrees + Full Size Appetizer)	TV
Neighborhood Pastas (Classic Broccoli Chicken Alfredo; Cajun Pasta with Blackened Shrimp; Chef Bulgarelli's Stuffed Rigatoni)-\$11.99	TV	Topped steak & Twisted Potatoes starting at \$12.99	TV	\$5 Spooky Sips (Dracula's Juice; Tippy Zombie)	New	Add a Dozen Double Crunch Shrimp to any Steak Entree for \$1	TV	Give a \$50 Gift Card & Get two \$10 Bonus Cards		\$5 Sleigh Bell Sips (Berry Merry Colada; Reindeer Punch)	
Garlic + Parsley Brushed Breadstick	New TV	25 cent Boneless Wings	TV	Grill Combos starting at \$12.99 (Two Meats & Two Sides)	TV	\$5 Spooky Sips (Dracula's Juice; Tippy Zombie)		2 For \$20 (Two Entrees + Full Size Appetizer)	TV	Give a \$50 Gift Card & Get a \$10 Bonus Card	TV
				Pasta & Grill Combos starting at \$9.99 (Choose a Pasta: Stuffed Rigatoni; Fettuccine Alfredo; Smoky Mozzarella Ravioli; Choose a Grilled Option: Grilled Chicken Breast; Sirloin; Blackened Cajun Salmon; Crispy & Grilled Shrimp + 2 Sides)	TV	Grill Combos starting at \$12.99 (Two Meats & Two Sides)	TV	\$5 Sleigh Bell Sips (Berry Merry Colada; Reindeer Punch)		Spinach + Artichoke Dip	
						Free Queso & Chips with any \$20 Online Order		Order Online & Get \$10 off \$30 (One Time Only)	TV	\$14.99 All You Can Eat (Riblets; Tenders; Shrimp)	TV
								Chicken Wonton Tacos		25 cent Boneless Wings	TV

**Notes:**  
 Click on "+" above column P for Historical Data  
 "New" represents a new product intro that month.  
 "TV" indicates that promotion was on TV during the month.

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### 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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