

Restaurants by the Numbers

\$1.5 Billion Restaurant-industry sales on a typical day in 2008

64% Percent of adults who said there are more restaurants they enjoy going to now than there were two years ago

32% Percent of casual-dining operators who believe electronic payment systems at the table will become more popular within their segment in the future

48% Percent of adults who have visited a restaurant's Web site

91% Percent of quickservice operators who believe offering wireless Internet access for customers will become more popular in the quickservice segment in the future

70% Percent of adults who said their favorite restaurant foods provide flavor and taste sensations which cannot easily be duplicated in their home kitchen

54% Percent of adults who said they would be likely to utilize a delivery option if offered by their favorite fullservice restaurant

\$2,694 Average household expenditure for food away from home in 2006

83% Percent of adults who said there are more healthy options available at quickservice restaurants than there were two years ago

86% Percent of fine-dining restaurants that serve locally sourced food items

66% Percent of quickservice operators who believe delivery will become more popular in the quickservice segment in the future

77% Percent of adults who said they like to receive a restaurant gift card or gift certificate on gift occasions

62% Percent of adults who said they are likely to make a restaurant choice based on how environmentally friendly a restaurant is

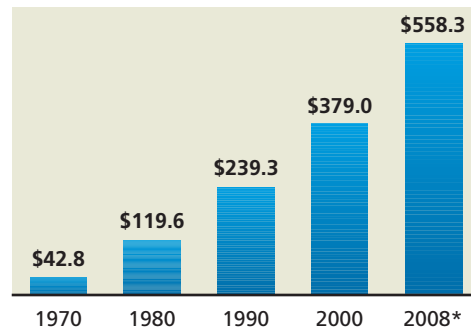
57% Percent of adults who said they would be likely to use a self-serve customer-activated ordering terminal if it was offered by a quickservice restaurant

57% Percent of family-dining restaurants that offer food items for retail sale

Restaurant Sales Since 1970

Food-and-Drink Sales

(Billions of Current Dollars)



* projected

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National Restaurant Association
2008 Restaurant Industry

POCKET FACTBOOK

Sales	\$558 Billion
Locations	945,000
Employees	13.1 million
Restaurant-Industry Share of the Food Dollar	48%



Industry Sales Projection, 2008:

\$558 Billion

	2008 Sales (Billion \$)
Commercial	\$510.4
Eating Places	376.7
Drinking Places	16.5
Managed Services	38.3
Hotel/Motel Restaurants	27.6
Retail, Vending, Recreation, Mobile	51.4
Other	\$47.8

Restaurants — An Essential Part of Daily Life

- Restaurants will provide more than 70 billion meal and snack occasions in 2008.
- On a typical day in America in 2008, 133 million individuals will be foodservice patrons.
- The typical adult averages 5.8 restaurant occasions in a week.
- 53% of adults said restaurants are an essential part of their lifestyle.

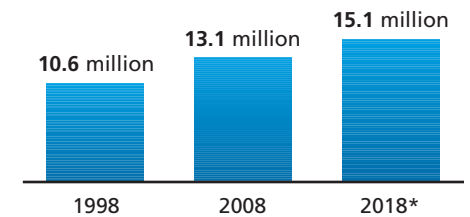
Restaurants — Cornerstone of Career Opportunities

- The restaurant industry employs an estimated 13.1 million people, or 9 percent of the U.S. workforce.
- The restaurant industry is expected to add 2 million jobs over the next decade, with employment reaching 15.1 million by 2018.
- Nearly half of all adults have worked in the restaurant industry at some point during their lives, and 32% of adults got their first job experience in a restaurant.
- Eating-and-drinking places are extremely labor intensive — sales per full-time-equivalent employee were \$61,344 in 2006 and notably lower than other industries.
- One-quarter of eating-and-drinking-place firms are owned by women, 15 percent by Asians, 8 percent by Hispanics and 4 percent by African-Americans.
- Eating-and-drinking places employ more minority managers than any other industry.
- The number of foodservice managers is projected to increase 11 percent from 2008 to 2018.

Restaurants — Small Businesses with a Large Impact on our Nation's Economy

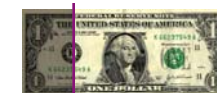
- Restaurant-industry sales are forecast to advance 4.4 percent in 2008 and equal 4 percent of the U.S. gross domestic product.
- The overall economic impact of the restaurant industry is expected to exceed \$1.5 trillion in 2008.
- Every dollar spent by consumers in restaurants generates an additional \$2.34 spent in our nation's economy.
- Each additional dollar spent in restaurants generates an additional \$0.99 in household earnings throughout the economy.
- Every additional \$1 million in restaurant sales generates an additional 37 jobs for the economy.
- Average unit sales in 2005 were \$833,000 at fullservice restaurants and \$694,000 at limited-service restaurants.
- More than seven out of 10 eating-and-drinking place establishments are single-unit operations.

Total Restaurant Industry Employment



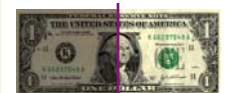
* projected

Restaurant Industry Share of the Food Dollar



25%

1955



48.0%

Present