

FAST CASUAL

Insights Group



LOOKING TO THE FUTURE OF FAST CASUAL TO MONITOR KEY DEVELOPMENTS AND FORECAST GROWTH

NEW!

COMPREHENSIVE PROGRAM INCLUDES:

- Leading chain consumer evaluations covering dozens of attributes
- Exclusive analysis and reporting on 400 Fast-Casual brands
- Growth forecasts, performance rankings and concept news
- New and limited-time-offer menu innovation updates

TECHNOMIC

Food Industry. Facts. Insights. Consulting.

FAST CASUAL

Insights Group

New Insights for the Future

Fast-Casual growth continues to outpace that of Quick Service and Full Service. Though it's still a small segment—comprising 6 percent of the restaurant industry—its **influence is great**. With origins in once-innovative concepts such as Fuddruckers and Koo Koo Roo and the “home meal replacement” trend; and prime development seen in chains like Chipotle Mexican Grill, Panera Bread and Five Guys Burgers and Fries; the Fast-Casual sector has **evolved and expanded**. The old terminology “adult fast food” is no longer an adequate definition.

In order to assess and **redefine** “Fast Casual,” monitor its evolution and forecast its growth, Technomic has launched the Fast Casual Insights Group.

Program Deliverables

Quarterly

TRACKING THE EVOLUTION OF FAST CASUAL

The *Fast Casual Monitor*, an exclusive quarterly publication that highlights:

- **News and Innovation**—In today's rapidly evolving competitive environment, Technomic experts **continually monitor** cutting-edge innovation and cross-segment competition as other operators adapt, integrate and extend their models.
- **Concepts to Watch**—Beyond the large chains and regional players, our editorial team reveals up-and-coming concepts and **trend-forward** sub-segments.
- **Global Development and Expansion**—Technomic's global chain databases shed light on successful international Fast-Casual brands and **provide early warning on competition from abroad** while tracking the **overseas expansion** of domestic chains.

Annual

EXCLUSIVE FAST CASUAL 400 REPORT

Released only to Fast Casual Insights Group members in May, the *Fast Casual 400 Report* **ranks and analyzes the performance** of the leading 400 Fast-Casual chains and independent restaurants by menu type and daypart, identifying both **competitive threats** and gaps in the marketplace that offer **rich opportunities**.

Annual

SEGMENT PERFORMANCE AND SHARE COVERAGE

With 45 years of experience in measuring and forecasting restaurant sales and industry growth, Technomic is uniquely qualified to provide historic perspective on the Fast-Casual segment, as well as a view to the future. In May, we deliver the following:

- **Segment Forecast to 2020**—Technomic annually updates expectations and forecasts for the Fast-Casual segment.
- **Top 100 Fast Casual Restaurant Report**—annual report with ranking, profiles and analysis of the 100 leading Fast-Casual chains.
- **Historic Perspective**—sales and unit growth, segment share and analysis on why some concepts succeed and others have failed.



With *SO* many benefits that help you stay smart about
SO many aspects of the fast-casual marketplace—
how can you afford not to join our innovative program?



Semi-Annual

MENU TRENDS AND INNOVATION

Each May and October, using Technomic's industry-leading **MenuMonitor** menu-tracking platform, we report on **new menu rollouts and limited-time offers**; analyze quarterly trends including seasonal, ethnic and healthy items; and **identify what's hot and what's not** on Fast-Casual menus.

Annual

CONSUMER ATTITUDES AND BEHAVIOR

An analysis of Technomic's exclusive Consumer Restaurant Brand Metrics, delivered in October, uncovers which Fast-Casual concepts are leaders on **50 specific brand attributes** and how the segment overall stacks up against the traditional quick-service, casual-dining and family-style segments.

Annual

OPERATOR CRITICAL STRATEGIC ISSUES

Technomic experts interview corporate-level executives of Fast-Casual concepts to better identify and understand **critical strategic issues and competitive threats** facing the segment's strong growth expectations. Findings are released to members in October.

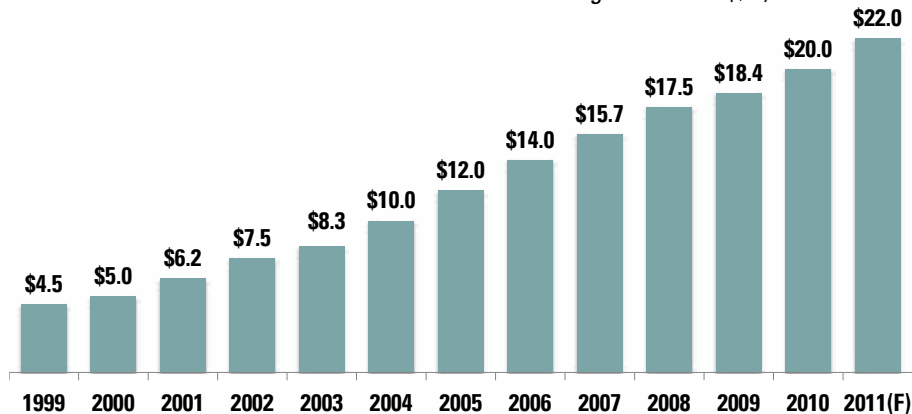
Semi-Annual

EXECUTIVE BRIEFINGS

Members are invited to attend semi-annual briefings, in May and October, that includes **interactive sessions with highlights from ongoing Technomic research**, presentations from Fast-Casual executives, and valuable discussion between operators and suppliers.

FAST-CASUAL SEGMENT PERFORMANCE AND FORECAST

13-Year Time Series—Fast-Casual Chain Segment Sales (\$B)



Technomic forecasts a 2.5% nominal increase in restaurant industry sales in 2011 over the prior year, but expects Fast-Casual segment sales to rise by about 10%.

Source: Technomic Segment Estimates

Next steps?

To join today or to learn more about this unique program, contact:
Patrick Noone at 312-506-3852 (pnoone@technomic.com).

Additional Technomic Insights Groups

■ ADULT BEVERAGE

Comprehensive program addresses the unique information needs of senior executives responsible for serving on-premise operators and growing business in this dynamic channel. Delivers invaluable **strategic research, tactical information tools, as well as customer and consumer insights** to assist in growth planning and investment decisions.

■ CONVENIENCE STORE

Through continuous monitoring of this growing channel, Technomic delivers critical business-building insights to group members, at a fraction of the cost of purchasing research on an individual basis. Delivers multiple reports with **consumer, financial and industry data and analysis**, as well as regular **news updates** and **informative webinars**—keeping members smart about c-store growth strategies.

■ CATERING

Enables operators and suppliers to stay abreast of the latest catering trends by providing annual updates on key opportunities for **B2B and Consumer catering markets**, including a *Quarterly Catering Trend Report* and **deep dives** into areas of interest to program sponsors.

About Technomic

Technomic, Inc. has been tracking the foodservice industry for over 45 years, providing industry intelligence, forecasts, data and training support to manufacturers, operators, distributors and others allied to the field. Our numerous publications and digital products—featuring quick-read newsletters, analytical annual reports, training handbooks, sales guides and restaurant chain profiles—help industry leaders keep a finger on the pulse of the entire foodservice terrain. Technomic delivers distinctive, premium content to its customers. To learn more about our products and services, visit us at **technomic.com**.

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