**SEGMENT HIGHLIGHTS:**

- **Notable Closures:** Approximately 1,000 Pizza Hut Express units, 91 Subway units, 46 Wendy’s units, all U.S. Pret A Manger locations, all Papa John’s umbrella units.
- **Almost all of Restaurant Brands International’s** (Burger King, Popeye’s, Tim Horton’s) North America locations remain open and operating off-premise. The company expects mild growth still for Popeye’s, and a drop in same-store-sales for the rest.
- **MTY Food Group** (Papa Murphy’s, Cold Stone Creamery) temporarily closed 2,100 stores and laid off half of its workforce.
- **Starbucks temporarily closed** ~56% corporate units and ~45% franchise units.
- **22 out of 27 Dessert chains in the Top 250 have closed units** because of COVID-19. Although most are attempting the off-premise switch, thus far 274 Menchie’s units, 124 Mrs. Fields units, 123 Great American Cookie Co. units, and many others have temporarily closed, particularly in malls and campuses.
- **LSR Burger, Chicken, Mexican, and Pizza chains** – many of which previously had the infrastructure to accommodate off-premise sales, are adapting reasonably well to COVID-19’s impact, albeit with some unit closure, restricted hours, and limited staffing.

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**SEGMENT BREAKDOWN:**

- **LIMITED-SERVICE:**
  - Dessert: 22 units
  - Pizza: 13 units
  - Coffee: 11 units
  - Burger: 9 units
  - Family Dining: 9 units
  - Other: 7 units
  - American: 7 units
  - Bakery-Café: 6 units
  - Sandwich: 6 units
  - Asian: 5 units
  - Salad-Healthful: 4 units
  - Mexican: 4 units
  - Sports Bar: 3 units
  - Pizza: 3 units
  - Regional-Ethnic: 2 units
  - Seafood-Steak: 2 units
  - Chicken: 1 unit

- **FULL-SERVICE:**
  - Dessert: 11 units
  - Pizza: 8 units
  - Coffee: 11 units
  - Burger: 9 units
  - Family Dining: 9 units
  - Other: 7 units
  - American: 7 units
  - Bakery-Café: 6 units
  - Sandwich: 6 units
  - Asian: 5 units
  - Salad-Healthful: 4 units
  - Mexican: 4 units
  - Sports Bar: 3 units
  - Pizza: 3 units
  - Regional-Ethnic: 2 units
  - Seafood-Steak: 2 units
  - Chicken: 1 unit

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**LIMITED-SERVICE:**

- **Notable Closures:** Approximately 418 Waffle House units, 343 First Watch units, 218 Red Lobster units, 66 Fuddruckers units, 35 corporate-owned Red Robin units, all corporate Logan’s Roadhouse locations, all Old Chicago Pizza locations.
- **Almost 99% of Darden’s** (Olive Garden, Longhorn Steakhouse) restaurants are still open and operating off-premise.
- **Dine Equity** (IHOP, Applebee’s) has yet to announce any unit closure, but have officially withdrawn 2020 guidance and $223,000,000 their revolving credit.
- **Bloomin’ Brands** (Carrabba’s, Outback, Bonefish Grill) shifted its high cash-flow to maximize off-premise business and has closed very few locations.
- **As of March 14, 95 of Ruby Tuesday’s 724 locations** have been closed permanently.
- **Denny’s sum-of-sales declined by 19% in March, and 6% overall for Q1.**
- **The Buffet-Cafeteria segment saw two different approaches:** Golden Corral suspended operations for all 35 company-owned restaurants, while Sizzler temporarily closed a few locations while pivoting to takeout and delivery.
- **FSR Sports Bar,** left with neither sports nor bar service, continues to navigate off-premise operations. All Buffalo Wild Wings locations and 80% of Hooters units are still open for takeout, while all Dave and Buster's units are temporarily closed.
TOP 250 CHAIN UPDATES (04.16.20) // orange text indicates chains with announced unit closures.

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LSR ASIAN:
Panda Express
Sarku Japan
Genji
Flame Broiler
Waba Grill
Pei Wei
Yoshinoya
Bonchon Chicken

LSR BAKERY-CAFE:
Panera Bread
Einstein Brothers
Schlotzsky's
Bruegger's
Great Harvest Bread Co.
Corner Bakery
Au Bon Pain
Newk's Eatery
Le Pain Quotidien
Pret A Manger

LSR BURGER:
McDonald's
Burger King
Wendy's
Sonic Drive-In
Jack In The Box
Hardee's
Five Guys
Carl's Jr.
Checkers And Rally's
Whataburger
Culver's
A&W
Steak N Shake
White Castle

LSR CHICKEN:
KFC
Chick-Fil-A
Popeye's
Wingstop
Church's Chicken
Zaxby's
Bojangles'
Raising Cane's
Boston Market
Chicken Express
Goldman Chicken
Pollo Tropical
Lee's Famous Recipe Chicken
Louisiana Famous Fried Chicken

LSR COFFEE:
Starbucks
Dunkin'
Tim Horton's
Caribou Coffee
Daylight Donuts
Dutch Bros Coffee

LSR DESSERT- SNACK:
Krispy Kreme
Shipley Do-Nuts
Coffee Bean And Tea Leaf
Peet's Coffee & Tea
Scooter's Coffeehouse
Biggby Coffee
Kung Fu Tea
Honey Dew Donuts
PJ's Coffee
Donut Connection
Human Bean

LSR MEXICAN:
Taco Bell
Chipotle
Qdoba
Moe's Southwest Grill
Del Taco
El Pollo Loco
Taco John's
Rubio's Coastal Grill
Taco Cabana
Fuzzy's Taco Shop
Taco Bueno
Baja Fresh
Cafe Rio
Tijuana Flats Burrito Co
Taco Time
Costa Vida

LSR PIZZA:
Pizza Hut
Domino's Pizza
Little Caesars
Papa John's
Papa Murphy's
Marco's Pizza
Hungry Howie's
Chuck E. Cheese
Godfather's Pizza
Mod Pizza
Round Table
Cici's Pizza
Jet's Pizza

LSR SALAD-HEALTHFUL:
Smoothie King
Tropical Smoothie Cafe
Jamba Juice
Sweetgreen
Planet Smoothie
Nekter Juice Bar
Freshii

LSR SANDWICH- DELI:
Subway
Arby's
Jimmy John's
Jersey Mike's
Firehouse Subs
Charley's Philly Steaks

Potbelly
McAlister's Deli
Which Wich
Wienschnitzel
Quiznos Subs
Penn Station East Coast Subs
Jason's Deli
Nathan's Famous
Blimpie
Togo's
American Deli
Chicken Salad Chick
Port Of Subs
Mr. Hero
Winchell's Donut House
Erbert & Gerbert's Subs & Club
Capriotti's
Cousins Subs

LSR OTHER:
Long John Silver's
Captain D's
Dickey's Barbecue Pit
Noodles & Co.
Zöe's Kitchen
Fazoli's
L & L Hawaiian Barbecue
Pita Pit
Skyline Chili
Golden Krust
Ono Hawaiian BBQ
Taziki's
Cava Grill
TOP 250 CHAIN UPDATES (04.16.20) // orange text indicates chains with announced unit closures.

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FSR AMERICAN
Applebee’s
Chili’s
Red Robin
Ruby Tuesday
TGI Fridays
BJ’s
Cheesecake Factory
O’Charley's
Cheddar’s Scratch Kitchen
Johnny Rockets
Hwy 55 Burgers, Shakes & Fries
Fuddruckers
Ninety Nine Restaurant And Pub
Bar Louie

FSR FAMILY DINING
Waffle House
IHOP
Denny’s
Cracker Barrel
Bob Evans
First Watch
Huddle House
Perkins
Braum’s
Big Boy/Frisch's
Friendly’s
Village Inn
Original Pancake House
Black Bear Diner
Shoney’s
Shari’s

FSR ITALIAN
Olive Garden
Carrabba’s

FSR PIZZA
Mellow Mushroom
California Pizza Kitchen
Old Chicago Pizza

FSR SEAFOOD-STEAK
Outback
Red Lobster
Texas Roadhouse
Longhorn Steakhouse
Logan’s Roadhouse
Bonefish Grill
Ruth’s Chris Steak House

FSR SPORTS BAR
Buffalo Wild Wings
Hooters
Beef ‘O’ Brady’s
Dave & Busters
Miller’s Ale House

FSR REGIONAL-ETHNIC
P.F. Chang’s
On The Border
Famous Dave’s
Chuy's Restaurant
Melting Pot Restaurant
Sonny’s BBQ

FSR BUFFET-CAFETERIA
Golden Corral
Sizzler