



News

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BIRMINGHAM, AL; LOUISVILLE, KY; AND AUSTIN, TX LEAD LOCAL MARKETS FOR FREQUENT FAST FOOD RESTAURANT PATRONAGE

Orlando, FL; Cincinnati and Fort Myers, FL are top Local Markets for Sit-Down Restaurant Patronage

Scarborough Research to Present Restaurant Industry Webinar June 7

NEW YORK (May 31, 2006) – Scarborough Research, the leading market research firm for identifying the shopping, media and lifestyle patterns of adults in the United States, released an analysis of quick service and sit-down restaurant patronage in the U.S. According to Scarborough, the average adult visits a quick service restaurant such as McDonald's or Subway 5.2 times in a given month. Birmingham, AL, residents, however, visit a quick service restaurant 6.5 times in the average month. Louisville, KY (6.4 average visits fast food restaurant visits per month), Austin, TX (6.3 average visits), Memphis, TN (6.3 average visits) and Raleigh, NC (6.2 average visits) round out the top five local markets for frequent fast food restaurant patronage.

In the sit-down restaurant category, which includes establishments such as Applebees, T.G.I. Friday's, and Boston Market, the average adult visits one of these restaurants 3.4 times a month. Orlando, FL is the top local market for the frequent sit-down restaurant patronage. Consumers here visit a sit-down restaurant 4.5 times monthly. Cincinnati, OH (4.2 average visits), Fort Myers, FL (4.2 average visits), Tampa, FL (4.1 average visits) and Atlanta, GA (4.1 average visits) complete the top five local markets for frequent sit-down restaurant patronage.

“An intensely local focus is the key to successful marketing in the restaurant industry, and going deep and understanding consumers at the trade area level is absolutely necessary,” said Karla Horton, manager, advertiser marketing services, Scarborough Research. “In understanding the lifestyles, media patterns and shopping habits of consumers on this local market level, franchisees can create better, locally-focused campaigns to drive store traffic.”

Ms. Horton and a team of Scarborough analysts will present more insights on today’s restaurant consumer during a free webinar taking place June 7 at 2pm. To register, log on to www.scarborough.com/qsr.php or call Tricia Lewis at 310-824-6616, email tricia.lewis@arbitron.com.

Full local market rankings follow.

Scarborough Local Market Analysis: Average Number of Visits to Quick Service Restaurants, Past 30 Days

DMA®*	Average Number of Visits, Past 30 Days	Index**
Birmingham, AL	6.5	125
Louisville, KY	6.4	124
Austin, TX	6.3	121
Memphis, TN	6.3	121
Tulsa, OK	6.2	120
Raleigh/Durham, NC	6.2	120
Atlanta, GA	6.2	119
San Antonio, TX	6.2	119
Oklahoma City, OK	6.2	119
Nashville, TN	6.1	117
Indianapolis, IN	6.1	117
Lexington, KY	6.1	117
Greensboro/High Point/Winston-Salem, NC	6.1	116
Dayton, OH	6.0	115
Kansas City, MO	6.0	115
Knoxville, TN	6.0	115
Charlotte, NC	6.0	115
Columbus, OH	6.0	114
Cincinnati, OH	6.0	114
Jacksonville, FL	5.9	113
Charleston/Huntington, WV	5.9	113
Houston, TX	5.9	112
Norfolk/Portsmouth/Newport News, VA	5.9	112
Chicago, IL	5.8	112
Mobile, AL/Pensacola, FL	5.8	111
Los Angeles, CA	5.8	111
Dallas/Fort Worth, TX	5.8	111
St. Louis, MO	5.8	111
Las Vegas, NV	5.8	111
Wichita/Hutchinson, KS	5.8	111
Greenville, SC	5.8	111
Salt Lake City, UT	5.8	111
El Paso, TX	5.6	108
Roanoke/Lynchburg, VA	5.6	107
Richmond/Petersburg, VA	5.6	107
Toledo, OH	5.5	106
Phoenix, AZ	5.5	106
Flint/Saginaw/Bay City, MI	5.5	105
Sacramento/Stockton/Modesto, CA	5.5	105
Fresno/Visalia, CA	5.5	105
Detroit, MI	5.4	104
Orlando/Daytona Beach/Melbourne, FL	5.4	104
Denver, CO	5.4	103
Cleveland/Akron, OH	5.3	102

Milwaukee, WI	5.3	101
Washington, D.C.	5.2	100
San Diego, CA	5.2	100
Honolulu, HI	5.2	100
Des Moines/Ames, IL	5.2	99
Tucson, AZ	5.1	98
Minneapolis/St. Paul, MN	5.1	98
Albuquerque/Santa Fe, NM	5.1	98
Baltimore, MD	5.0	96
Tampa/St.Petersburg, FL	5.0	96
Grand Rapids/Kalamazoo/Battle Creek, MI	4.9	94
Miami/Ft.Lauderdale, FL	4.8	93
Portland, OR	4.7	91
Providence/New Bedford, RI	4.7	90
San Francisco/Oakland/San Jose, CA	4.7	89
Seattle/Tacoma, WA	4.6	88
West Palm Beach/Fort Pierce, FL	4.6	88
Buffalo, NY	4.5	86
Pittsburgh, PA	4.5	86
Spokane, WA	4.5	85
Boston, MA	4.3	83
Rochester, NY	4.3	82
Wilkes-Barre/Scranton, PA	4.3	82
New York, NY	4.2	80
Albany/Schenectady/Troy, NY	4.1	79
Hartford/New Haven, CT	4.1	79
Harrisburg/Lancaster/Lebanon/York, PA	4.1	79
Philadelphia, PA	4.1	79
Syracuse, NY	4.0	77
Fort Myers/Naples, FL	4.0	77

**Scarborough Local Market Analysis: Average Number of Visits to Sit-Down
Restaurants, Past 30 Days**

DMA®*	Average Number of Visits, Past 30 Days	Index**
Orlando/Daytona Beach/Melbourne, FL	4.5	131
Cincinnati, OH	4.2	123
Fort Myers/Naples, FL	4.2	121
Tampa/St.Petersburg, FL	4.1	119
Atlanta, GA	4.1	118
Greensboro/High Point/Winston-Salem, NC	4.1	118
San Antonio, TX	4.0	117
Houston, TX	4.0	117
West Palm Beach/Fort Pierce, FL	4.0	116
Austin, TX	4.0	116
Knoxville, TN	3.9	114
Dayton, OH	3.9	114
Jacksonville, FL	3.9	112
Dallas/Fort Worth, TX	3.8	110
Nashville, TN	3.8	110
Los Angeles, CA	3.8	110
Columbus, OH	3.8	110
St. Louis, MO	3.8	109
Louisville, KY	3.8	109
Mobile/Pensacola, FL	3.7	108
Kansas City, MO	3.7	108
Oklahoma City, OK	3.7	107
Sacramento/Stockton/Modesto, CA	3.7	107
Raleigh/Durham, NC	3.7	107
Tulsa, OK	3.6	106
Charlotte, NC	3.6	106
Indianapolis, IN	3.6	105
San Francisco/Oakland/San Jose, CA	3.6	105
Grand Rapids/Kalamazoo/Battle Creek, MI	3.6	105
Greenville/Spartanburg/Asheville/Anderson, SC	3.6	104
Miami/Ft.Lauderdale, FL	3.6	104
San Diego, CA	3.6	103
Detroit, MI	3.6	103
Denver, CO	3.5	103
Washington, D.C.	3.5	103
Norfolk/Portsmouth/Newport News, VA	3.5	103
Harrisburg/Lancaster/Lebanon/York, PA	3.5	103
Providence/New Bedford, RI	3.5	102
Chicago, IL	3.5	102
Phoenix, AZ	3.5	101
Las Vegas, NV	3.5	101
Minneapolis/St. Paul, MN	3.5	100
Albuquerque/Santa Fe, NM	3.5	100

Tucson, AZ	3.4	100
Roanoke/Lynchburg, VA	3.4	99
Wichita/Hutchinson, KS	3.4	99
Pittsburgh, PA	3.4	99
Memphis, TN	3.4	99
Cleveland/Akron, OH	3.4	99
Portland, OR	3.4	98
El Paso, TX	3.4	98
Birmingham, AL	3.4	98
Richmond/Petersburg, VA	3.4	98
Baltimore, MD	3.4	97
Toledo, OH	3.3	97
Seattle/Tacoma, WA	3.3	96
Wilkes-Barre/Scranton, PA	3.3	95
Flint/Saginaw/Bay City, MI	3.3	94
Philadelphia, PA	3.2	93
Boston, MA	3.2	93
Lexington, KY	3.1	91
New York, NY	3.1	90
Hartford/New Haven, CT	3.1	89
Des Moines/Ames, IA	3.1	89
Salt Lake City, UT	3.0	88
Milwaukee, WI	3.0	88
Charleston/Huntington, WV	3.0	88
Albany/Schenectady/Troy, NY	3.0	88
Syracuse, NY	3.0	88
Fresno/Visalia, CA	3.0	88
Honolulu, HI	3.0	86
Buffalo, NY	3.0	86
Rochester, NY	2.9	85
Spokane, WA	2.5	72

* DMA® or Designated Market Area, is a trademark of Nielsen Media Research.

** Index is against the mean trips made to a restaurant establishment. For example, in the quick service restaurant ranking, Birmingham, AL has an index of 125. This means that Birmingham consumers are 25 percent more likely than all consumers nationally to be frequent visitors of quick service restaurants.

SOURCE: Scarborough Research, 2005, Scarborough USA+ (Release 2 2005). The Scarborough USA+ database is a national study of consumer behaviors, including lifestyles, media patterns, and retail preferences.

About Scarborough Research

Scarborough Research (www.scarborough.com, info@scarborough.com) measures the lifestyle and shopping patterns, media behaviors, and demographics of American consumers. Products and services include local market consumer insight studies in 80 Top-Tier Markets (comprised of the Top Cities in the US) and 6 Mid-Tier Markets (comprised of smaller U.S. cities), Scarborough USA+ (a national database), Scarborough Multi-Market Database, Hispanic studies, customer

relationship management and database integration solutions. With more than 30 years of experience, Scarborough measures more than 1,700 categories and serves a broad client base of more than 3,500 subscribers including marketers, advertising agencies, electronic and print media, broadcast and cable television, radio stations, sports teams and leagues, and out-of-home companies. Surveying more than 210,000 adults annually, Scarborough is a joint venture between Arbitron Inc. and VNU Media Measurement & Information.