

Restaurant, Food & Beverage Market Research Handbook 2014-2015



Richard K. Miller & Associates
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RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2014-2015

15th Edition

RKMA MARKET RESEARCH HANDBOOK SERIES

By: Kelli Washington and Richard K. Miller

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PART I: MARKET OVERVIEW

MARKET SUMMARY

1.1 Overview

There are nearly one million restaurant and foodservice locations in the United States. The restaurant share of the food dollar is approximately 47%. The industry employs 13.5 million people.

1.2 Industry Sales

According to the National Restaurant Association (www.restaurant.org), total restaurant industry sales are projected to reach \$683.4 billion in 2014, an increase of 3.6% from the previous year. Distribution of sales for 2014 is as follows:

COMMERCIAL RESTAURANT SERVICES

- Restaurants: \$455.9 billion
- Retail, vending, recreation, mobile, and other: \$ 72.6 billion
- Managed services: \$ 47.1 billion
- Hotel restaurants: \$ 34.8 billion
- Bars and taverns: \$ 19.9 billion
- Total: \$624.3 billion

NONCOMMERCIAL RESTAURANT SERVICES

- Total: \$ 56.6 billion

MILITARY RESTAURANT SERVICES

- Total: \$ 2.5 billion

Sales at full-service restaurants are projected to reach \$212.4 billion in 2014, an increase of 2.6% over 2013 and a real growth rate of 0.2%. Sales at quick-service restaurants are projected to reach approximately \$195.4 billion in 2014, an increase of 4.4% over 2013 and a real growth rate of 2.1%.

The National Restaurant Association projects food and beverage sales for restaurant and foodservice segments in 2014 as follows (change from 2013 in parenthesis):

EATING AND DRINKING PLACES

- Full-service restaurants: \$212.36 billion (2.6%)
- Quick-service restaurants: \$195.38 billion (4.4%)

• Snack and nonalcoholic beverage bars:	\$ 30.69 billion (5.0%)
• Bars and taverns:	\$ 19.96 billion (2.9%)
• Social caterers:	\$ 8.67 billion (5.0%)
• Cafeterias, grill-buffets, and buffets:	\$ 8.23 billion (2.5%)
• Total:	\$455.94 billion (3.6%)

RETAIL AND LODGING

• Retail-host restaurants:	\$ 38.31 billion (5.1%)
• Hotel/accommodation restaurants:	\$ 34.85 billion (5.5%)
• Recreation and sports (movies, bowling lanes, recreation, sport centers):	\$ 14.53 billion (2.5%)
• Vending and non-store retailers:	\$ 12.86 billion (3.4%)
• Mobile caterers:	\$ 718 million (4.3%)
• Total:	\$ 95.59 billion (3.8%)

FOODSERVICE CONTRACTOR-MANAGED SERVICES

• Colleges and universities:	\$ 15.20 billion (2.5%)
• Manufacturing and industrial plants:	\$ 7.98 billion (4.5%)
• Primary and secondary schools:	\$ 6.59 billion (3.8%)
• Recreation and sports centers:	\$ 6.22 billion (3.2%)
• Hospitals and nursing homes:	\$ 6.00 billion (5.4%)
• Commercial and office buildings:	\$ 2.92 billion (3.1%)
• In-transit foodservice (airlines):	\$ 2.20 billion (-0.3%)
• Total:	\$ 47.10 billion (3.4%)

NONCOMMERCIAL RESTAURANT SERVICES

(Businesses, educational, governmental, or institutional organizations which operate their own restaurant services)

• Hospitals:	\$ 17.04 billion (3.2%)
• Clubs, sporting, and recreational camps:	\$ 10.26 billion (3.8%)
• Nursing homes:	\$ 7.14 billion (3.1%)
• Colleges and universities:	\$ 7.72 billion (1.9%)
• Community centers:	\$ 3.16 billion (2.8%)
• Transportation:	\$ 2.32 billion (2.7%)
• Employee restaurant services:	\$ 435 million (2.0%)
• Total:	\$ 56.57 billion (3.0%)

MILITARY RESTAURANT SERVICES

• Officer and NCO clubs (open mess):	\$ 1.72 billion (2.0%)
• Military exchanges:	\$ 812 million (2.8%)
• Total:	\$ 2.53 billion (2.3%)

1.3 Revenue Distribution

According to the National Restaurant Association, revenue distribution for restaurant segments is as follows:

Full-Service

- Food sales: 79%
- Beverage sales: 21%

Limited-Service

- Food sales: 86%
- Beverage sales: 4%
- Other: 10%

1.4 Restaurant Sales Growth

According to the National Restaurant Association, sales growth for the restaurant industry is as follows:

	Current Dollar Growth	Real (Inflation-Adjusted) Growth
• 2000:	5.5%	3.0%
• 2001:	4.6%	0.8%
• 2002:	5.3%	1.2%
• 2003:	4.5%	2.1%
• 2004:	6.2%	3.0%
• 2005:	5.3%	2.2%
• 2006:	4.7%	1.6%
• 2007:	4.8%	1.0%
• 2008:	3.5%	-0.9%
• 2009:	-0.4%	-2.8%
• 2010:	3.0%	0.5%
• 2011:	4.1%	1.6%
• 2012:	4.2%	1.3%
• 2013:	3.8%	0.8%
• 2014*:	3.6%	1.2%

*projected

1.5 Restaurant Traffic Growth

According to The NPD Group (www.npd.com), restaurant traffic growth by segment in 2013 was as follows:

- Fast-casual restaurants: 8%
- Hotel restaurants: 7%
- Fine-dining restaurants: 6%
- Coffeeshops/doughnut/bagel: 5%
- Mexican restaurants: 2%
- Bakery/snack restaurants: 1%
- Casual-dining steakhouses: 1%
- Quick-service restaurants: no change
- Mid-scale restaurants: -2%
- Casual-dining restaurants: -1%

1.6 Restaurant Expenditures

According to the National Restaurant Association, expenses for full-service restaurants are distributed as follows:

- Cost of food and beverages sold: 32%
- Salaries and wages: 30%
- Restaurant occupancy costs: 7%
- General and administrative expenses: 3%
- Pretax income: 4%
- Other (including direct operating expenses, marketing, utility services, maintenance, depreciation, administrative, interest, and corporate overhead): 24%

Expenses for limited-service restaurants are distributed as follows:

- Cost of food and beverages sold: 33%
- Salaries and wages: 30%
- Restaurant occupancy costs: 6%
- Pretax income: 8%
- General and administrative costs: 3%
- Other: 20%

The National Restaurant Association estimates food and beverage purchases by restaurants (including bars and taverns) in 2014 at \$146.1 billion. Managed foodservice spending is estimated at \$16.7 billion.

1.7 Restaurant Counts

The NPD Group conducts a count of U.S. commercial restaurant locations in the spring and fall each year through its ReCount® service. The restaurant counts from the fall ReCounts have been as follows:

- 2005: 571,290
- 2006: 571,143
- 2007: 579,558
- 2008: 582,930
- 2009: 585,088
- 2010: 583,500
- 2011: 611,566
- 2012: 616,566
- 2013: 633,043

The Fall 2013 ReCount reported restaurants by category as follows (change from Fall 2012 in parenthesis):

Ownership

- Independent: 351,430 (0.3%)
- Chains: 281,613 (1.1%)

Type of Service

- Quick-service and fast-casual: 333,970 (2.0%)
- Full-service (including casual-dining, midscale/family-dining, and fine-dining: 299,073 (-1.0%)

It is estimated that independents and small chain restaurants garner 58% of restaurant dollars.

Independents and small chains are strongest in the Northeast, where there are a higher number of Italian restaurants, bagel shops, and delis. In the West, Asian and Mexican restaurants are most popular. The Southeast is primarily chain-oriented, with the percentage of independents well below the national average.

1.8 Chain Restaurant Classification

According to *2013 Chain Restaurant Operators*, published by Chain Store Guide (www.chainstoreguide.com), there are 391,429 chain restaurants in the United States. Distribution is as follows:

Type of Foodservice*

- Quick-service: 305,977
- Casual-dining: 35,948
- Fast-casual: 21,284
- Family-dining: 14,519

- In-store restaurant: 10,680
- Fine-dining: 2,470
- Cafeteria: 551

Type of Menu*

- Hamburger: 89,106
- Sandwiches/Deli: 62,291
- Pizza: 56,642
- Snacks: 39,391
- Chicken: 34,358
- American: 34,009
- Coffee: 21,859
- Taco: 11,207
- Mexican: 7,009
- Italian: 5,488
- Seafood: 4,865
- Steak: 3,895
- Southwest/Tex-Mex: 2,857
- Health Foods: 2,133
- Chinese: 2,031
- Bar-B-Q: 1,715
- Hot Dogs: 1,502
- Asian: 1,442
- Bagels: 1,438
- Greek/Mediterranean: 681
- Steak/Seafood: 680
- Japanese: 477
- Cajun/Creole: 339
- French/Continental: 292
- Caribbean: 207
- Californian: 139
- Southern: 94
- Latin American/Cuban: 93
- Indian: 72
- Spanish: 62
- Eastern European: 57
- Middle Eastern: 45
- Thai: 30
- German: 5
- Other: 972

* Some locations offer more than one type of foodservice or menu

Chain Store Guide includes all restaurant groups with two or more locations in the count of chain restaurants. The NPD Group classifies some small local restaurant

groups as independents. This difference, in part, accounts for the differing counts in sections 1.7 and 1.8.

1.9 Restaurant Visits

The NPD Group assesses the total number of annual visits to restaurants and the average number of visits per capita as follows:

	Total Visits	Visits Per Capita
• 2009:	59 billion	206
• 2010:	60 billion	197
• 2011:	61 billion	196
• 2012:	61 billion	195
• 2013:	61 billion	195

Restaurant visits by age demographic are assessed in Section 53.1 of this handbook.

1.10 Dining Out With Children

According to The NPD Group, families with children under 18 years old made 26.7 billion restaurant visits in 2013, a drop of 14% from five years prior.

By annual household income, average per-capita restaurant visits by families with children have been as follows:

	2013	2008
• Under \$45,000:	145	173
• Over \$45,000:	181	205

“Many [restaurants] seem to have neglected ... families with kids, and its starting to show. Families with children under the age of 18 are making fewer restaurant visits than they did five years ago.”

Nation’s Restaurant News, 12/2/13

Families in all income groups with children under age 18 visit QSRs for the majority of their restaurant occasions. Higher income families eat at QSRs for 64% of their restaurant visits; those with annual incomes less than \$45,000 do so for 66% of

their visits.

Meal purchases at retail outlets – primarily prepared meals – by lower-income families with children account for 19% of visits.

The fast-casual segment garners 4% of all restaurant traffic. Higher-income families visit fast-casual restaurants for 5% of their meals out; for lower-income families, that figure is 3%.

Higher-income families dine at full-service restaurants for 20% of their meals away from home while lower-income families do so for 12%.

1.11 Cutting Back

Many consumers cut back on dining at restaurants during the economic downturn because they could not afford to do so. Some consumers are still cutting back, but for other reasons.

According to the Restaurant Consumer Sentiment Review by AlixPartners (www.alixpartners.com), consumers planning fewer restaurant trips in 2014 give the following reasons:

- | | |
|--|-----|
| • Want to eat more healthfully: | 60% |
| • Current finances: | 59% |
| • Restaurant meals are too expensive: | 39% |
| • Concern over future financial situation: | 19% |
| • Too far to drive: | 5% |
| • Restaurant food is too unpredictable: | 5% |
| • Plan to purchase ready-to-eat meals from grocery stores instead: | 5% |

“Restaurant traffic will be a key concern in 2014 as consumers say they plan to eat out less often – but not necessary because of budget constraints, as has been the case since the recession.”

Nation's Restaurant News, 12/2/13

1.12 Restaurant Performance Index

The National Restaurant Association publishes a monthly Restaurant Performance Index (RPI), a composite index that tracks the health of and outlook for the U.S. restaurant industry. The RPI is released and made available at

www.restaurant.org on the last business day of each month.

The RPI is constructed so that the health of the restaurant industry is measured in relation to a steady-state level of 100. Index values above 100 indicate that key industry indicators are in a period of expansion, while index values below 100 represent a period of contraction for key industry indicators.

The RPI consists of two components: the Current Situation Index and the Expectations Index. The Current Situation Index measures current trends in four industry indicators (same-store sales, traffic, labor, and capital expenditures). The Expectations Index measures restaurant operators' six-month outlook for four industry indicators (same-store sales, employees, capital expenditures, and business conditions).

The following graph shows the RPI since 2003.



1.13 Market Resources

AlixPartners, 300 N. LaSalle Drive, Suite 1900, Chicago, IL 60654. (312) 346-2500. (www.alixpartners.com)

National Restaurant Association, 2055 L Street NW, Suite 700, Washington, DC 20036. (202) 331-5900. (www.restaurant.org)

Technomic, Inc., 300 South Riverside Plaza, Suite 1200, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)

The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700. (www.npd.com)

STATE-BY-STATE ANALYSIS

2.1 Restaurant Sales By State

The National Restaurant Association (www.restaurant.org) projects restaurant sales in 2014 for each state as follows (change from 2013 in parenthesis):

- Alabama: \$ 6.607 billion (3.6%)
- Alaska: \$ 1.351 billion (3.4%)
- Arizona: \$10.974 billion (4.9%)
- Arkansas: \$ 3.587 billion (3.2%)
- California: \$69.711 billion (3.9%)
- Colorado: \$ 9.815 billion (4.1%)
- Connecticut: \$ 6.220 billion (2.9%)
- Delaware: \$ 1.689 billion (3.6%)
- District of Columbia: \$ 2.753 billion (3.0%)
- Florida: \$34.695 billion (4.5%)
- Georgia: \$16.511 billion (3.7%)
- Hawaii: \$ 3.831 billion (3.5%)
- Idaho: \$ 1.999 billion (3.7%)
- Illinois: \$22.362 billion (3.4%)
- Indiana: \$ 9.468 billion (3.0%)
- Iowa: \$ 3.542 billion (2.6%)
- Kansas: \$ 3.938 billion (3.1%)
- Kentucky: \$ 6.437 billion (3.4%)
- Louisiana: \$ 7.028 billion (3.6%)
- Maine: \$ 2.044 billion (2.5%)
- Maryland: \$10.581 billion (3.3%)
- Massachusetts: \$13.450 billion (2.7%)
- Michigan: \$13.471 billion (3.1%)
- Minnesota: \$ 8.468 billion (3.0%)
- Mississippi: \$ 3.507 billion (3.4%)
- Missouri: \$ 9.369 billion (2.9%)
- Montana: \$ 1.509 billion (3.5%)
- Nebraska: \$ 2.514 billion (3.1%)
- Nevada: \$ 5.954 billion (3.7%)
- New Hampshire: \$ 2.405 billion (2.9%)
- New Jersey: \$14.585 billion (3.2%)
- New Mexico: \$ 3.229 billion (3.6%)

• New York:	\$34.635 billion (3.6%)
• North Carolina:	\$15.942 billion (3.7%)
• North Dakota:	\$ 886 billion (4.8%)
• Ohio:	\$17.832 billion (2.8%)
• Oklahoma:	\$ 5.287 billion (3.4%)
• Oregon:	\$ 6.711 billion (3.8%)
• Pennsylvania:	\$18.279 billion (2.9%)
• Rhode Island:	\$ 1.980 billion (2.3%)
• South Carolina:	\$ 7.747 billion (3.6%)
• South Dakota:	\$ 1.101 billion (3.4%)
• Tennessee:	\$10.132 billion (3.2%)
• Texas:	\$42.557 billion (4.7%)
• Utah:	\$ 3.624 billion (3.8%)
• Vermont:	\$ 874 billion (2.3%)
• Virginia:	\$14.334 billion (3.4%)
• Washington:	\$11.201 billion (3.3%)
• West Virginia:	\$ 2.207 billion (2.7%)
• Wisconsin:	\$ 7.525 billion (3.0%)
• Wyoming:	\$ 884 billion (3.4%)

2.2 Restaurant Locations By State

According to the National Restaurant Association, at year-end 2012 (most recent data available) the number of restaurants by state was as follows:

• Alabama:	7,487
• Alaska:	1,367
• Arizona:	9,092
• Arkansas:	4,717
• California:	63,996
• Colorado:	10,703
• Connecticut:	7,505
• Delaware:	1,809
• District of Columbia:	2,179
• Florida:	37,899
• Georgia:	16,484
• Hawaii:	3,219
• Idaho:	2,929
• Illinois:	25,785
• Indiana:	11,676
• Iowa:	5,961
• Kansas:	5,028
• Kentucky:	6,944
• Louisiana:	8,307
• Maine:	2,971

• Maryland:	10,790
• Massachusetts:	15,072
• Michigan:	15,937
• Minnesota:	10,043
• Mississippi:	4,369
• Missouri:	10,639
• Montana:	2,634
• Nebraska:	3,825
• Nevada:	5,242
• New Hampshire:	2,964
• New Jersey:	17,867
• New Mexico:	3,262
• New York:	43,332
• North Carolina:	17,626
• North Dakota:	1,583
• Ohio:	21,821
• Oklahoma:	6,238
• Oregon:	9,090
• Pennsylvania:	24,991
• Rhode Island:	2,726
• South Carolina:	8,139
• South Dakota:	1,791
• Tennessee:	9,930
• Texas:	40,652
• Utah:	4,427
• Vermont:	1,355
• Virginia:	14,251
• Washington:	14,102
• West Virginia:	3,167
• Wisconsin:	12,045
• Wyoming:	1,316

2.3 Foodservice Employment By State

According to *2014 Restaurant Industry Forecast*, by the National Restaurant Association, roughly 13.5 million people are employed in the restaurant and foodservice sector, a figure which is projected to increase at an average national rate of 0.9% through 2024.

Current restaurant employment and the projected average annual increase through 2024 are as follows:

	Employment	Increase
• Alabama:	169,400	1.3%
• Alaska:	27,200	1.3%
• Arizona:	264,400	1.5%

• Arkansas:	111,800	1.3%
• California:	1,544,000	0.9%
• Colorado:	250,500	1.3%
• Connecticut:	152,700	0.5%
• Delaware:	43,900	1.3%
• District of Columbia:	59,400	0.6%
• Florida:	899,000	1.4%
• Georgia:	405,800	1.6%
• Hawaii:	85,300	0.6%
• Idaho:	61,400	1.1%
• Illinois:	515,600	0.6%
• Indiana:	308,800	0.7%
• Iowa:	142,800	0.7%
• Kansas:	131,800	0.8%
• Kentucky:	195,700	0.8%
• Louisiana:	197,000	0.7%
• Maine:	60,100	0.7%
• Maryland:	234,900	0.7%
• Massachusetts:	317,400	0.6%
• Michigan:	399,300	0.6%
• Minnesota:	260,800	0.6%
• Mississippi:	115,500	1.0%
• Missouri:	281,700	0.6%
• Montana:	51,800	0.7%
• Nebraska:	87,000	0.6%
• Nevada:	199,000	1.4%
• New Hampshire:	61,600	0.7%
• New Jersey:	322,300	0.6%
• New Mexico:	85,500	1.0%
• New York:	772,000	0.6%
• North Carolina:	426,200	1.3%
• North Dakota:	39,400	1.2%
• Ohio:	534,300	0.6%
• Oklahoma:	160,600	1.0%
• Oregon:	176,200	1.1%
• Pennsylvania:	538,000	0.5%
• Rhode Island:	50,600	0.6%
• South Carolina:	206,000	1.2%
• South Dakota:	46,200	0.9%
• Tennessee:	283,000	0.8%
• Texas:	1,117,300	1.4%
• Utah:	111,600	1.3%
• Vermont:	26,400	0.6%
• Virginia:	354,900	0.9%

- Washington: 279,700 0.9%
- West Virginia: 73,100 0.5%
- Wisconsin: 272,300 0.6%
- Wyoming: 27,800 0.7%

REVIEW OF 2013

3.1 Dining Out and the Economy

Harris Interactive (www.harrisinteractive.com), which monitors consumer spending through nationwide polls, found that during the economic downturn more consumers decreased spending on dining out than for any other major budget item.

Fewer consumers in 2012 had said they planned to decrease spending on dining out than any time since the Great Recession began 2008, however, the percentage of consumers planning to cutback on restaurant spending rose in 2013.

When Harris Polls asked consumers if they planned to decrease restaurant spending during the coming six months, responses were as follows (percentage saying very/somewhat likely):

- 2008: 65%
- 2009: 67%
- 2010: 66%
- 2011: 61%
- 2012: 59%
- 2013: 62%

Surveys were conducted in November 2008, September 2009, September 2010, November 2011, November 2012, and June 2013.

3.2 Restaurant Business Overview

When asked by the National Restaurant Association (www.restaurant.org) in a November 2013 survey to describe overall business conditions in their segment, restaurant operators responded as follows:

	Excellent	Good	Fair	Poor
• Fine-dining:	6%	41%	46%	7%
• Casual-dining:	9%	38%	41%	13%
• Family-dining:	1%	39%	51%	6%
• Fast-casual:	11%	38%	43%	9%
• Quick-service:	9%	40%	41%	10%

When asked to compare their anticipated profitability in 2014 with 2013, responses were as follows:

	Better	Same	Worse
• Fine-dining:	24%	43%	33%
• Casual-dining:	31%	44%	25%
• Family-dining:	32%	51%	17%
• Fast-casual:	50%	34%	16%
• Quick-service:	22%	38%	40%

3.3 Same-Store Sales

Same-store sales at chain restaurants for the most recently reported quarter (as of March 2014) compared with the same quarter a year prior are as follows (sources: company reports and *Nation's Restaurant News*):

Casual-Dining

• Buffalo Wild Wings Grill & Bar (franchised):	7.4%
• Ruth's Chris Steakhouse:	5.9%
• Buffalo Wild Wings Grill & Bar (corporate):	5.8%
• Del Frisco's Double Eagle Steak House:	5.3%
• Texas Roadhouse (franchised):	4.9%
• Mitchell's Fish Market:	4.6%
• Outback Steakhouse:	4.5%
• Fleming's Prime Steakhouse and Wine Bar:	4.1%
• Texas Roadhouse (corporate):	3.6%
• Bonefish Grill:	3.5%
• BJ's Restaurant (corporate):	2.3%
• Applebee's Neighborhood Grill & Bar:	2.0%
• Bahama Breeze:	1.9%
• Chuy's:	1.5%
• Sullivan's Steakhouse:	1.4%
• Red Robin Gourmet Burgers (corporate):	1.4%
• The Cheesecake Factory:	1.3%
• Carrabba's Italian Grill:	1.0%
• Chili's Grill & Bar (corporate):	1.0%
• The Capital Grille:	0.8%
• Maggiano's Little Italy:	0.6%
• Ruby Tuesday (corporate):	0.3%
• Ruby Tuesday (franchised):	0.2%
• Kona Grill:	0.1%
• Bravo! Cucina Italiana:	-0.5%
• LongHorn Steakhouse:	-0.8%
• Seasons 52:	-1.0%
• Brio Tuscan Grille:	-1.1%
• Red Lobster:	-2.7%

- Olive Garden: -3.2%
- Grand Lux Cafe: -3.2%
- Famous Dave's (franchised): -4.0%
- Famous Dave's (corporate): -6.0%

Quick-Service

- Popeye's Louisiana Kitchen: 6.4%
- Burger King (U.S. & Canada): 3.7%
- Jack in the Box (corporate): 3.1%
- Sonic: 3.0%
- Yum! Brands: 3.0%
- Steak 'n Shake: 1.3%
- McDonald's: 0.9%
- Wendy's (corporate): -0.2%
- Wendy's (franchised): -0.6%

Fast-Casual

- Pollo Tropical: 7.0%
- Panera Bread: 5.8%
- Chipotle Mexican Grill: 3.8%
- Taco Cabana: 1.8%
- Qdoba Mexican Grill: 1.2%
- Einstein Bros. Bagels/Noah New York Bagels: 0.2%
- Cosi (corporate): -2.5%

Family-Dining and Buffet

- Cracker Barrel Old Country Store: 3.3%
- Denny's (franchised): 2.0%
- Bob Evans Restaurants: 1.0%
- Denny's (corporate): 0.5%
- Luby's (and other chains): 0.2%
- Frisch's Big Boy (corporate): -1.7%
- IHOP: -2.0%

Pizza

- Domino's Pizza: 3.3%
- Papa John's Pizza: 2.5%
- Chuck E. Cheese's (corporate): -2.3%

Coffee and Snack

- Starbucks Coffee (Americas): 7.0%
- Krispy Kreme Doughnuts (corporate): 6.8%
- Jamba Juice (corporate): 3.9%
- Dunkin' Donuts (U.S.): 3.2%

- Tim Hortons (U.S.): 2.3%
- Baskin-Robbins: 1.5%

3.4 Market Resources

“2013: The Year In Review,” *Nation’s Restaurant News*, December 2013.
(www.nrn.com/2013-year-review)

PUBLICALLY TRADED RESTAURANT CORPORATIONS

4.1 Overview

Stocks for 59 restaurant corporations are traded on the New York Stock Exchange and NASDAQ. The combined market capitalization for these 59 companies is \$286.04 billion (as of First Quarter 2014).

4.2 Restaurant Stocks and Market Capitalization

Publicly traded restaurant corporations and their market capitalization are as follows:

Company	Ticker	Market Cap
• McDonald's Corporation:	MCD	\$97.78 billion
• Starbucks Corp.:	SBUX	\$56.72 billion
• Yum! Brands, Inc.:	YUM	\$34.25 billion
• Chipotle Mexican Grill, Inc.:	CMG	\$18.13 billion
• Burger King Worldwide, Inc.:	BKW	\$ 9.71 billion
• Tim Hortons, Inc.:	THI	\$ 7.60 billion
• Darden Restaurants, Inc.:	DRI	\$ 6.06 billion
• Dunkin Brands Group, Inc.:	DNKN	\$ 5.55 billion
• Panera Bread Company:	PNRA	\$ 5.00 billion
• Dominos Pizza, Inc.:	DPZ	\$ 4.41 billion
• Brinker International, Inc.:	EAT	\$ 3.57 billion
• The Wendy's Company:	WEN	\$ 3.39 billion
• Bloomin' Brands, Inc.:	BLMN	\$ 3.08 billion
• Buffalo Wild Wings, Inc.:	BWLD	\$ 2.79 billion
• Jack in the Box, Inc.:	JACK	\$ 2.51 billion
• The Cheesecake Factory Incorporated:	CAKE	\$ 2.42 billion
• Cracker Barrel Old Country Store, Inc.:	CBRL	\$ 2.39 billion
• Papa John's International, Inc.:	PZZA	\$ 2.23 billion
• Texas Roadhouse, Inc.:	TXRH	\$ 1.81 billion
• DineEquity, Inc.:	DIN	\$ 1.59 billion
• Fiesta Restaurant Group, Inc.:	FRGI	\$ 1.30 billion
• Krispy Kreme Doughnuts, Inc.:	KKD	\$ 1.28 billion
• Bob Evans Farms, Inc.:	BOBE	\$ 1.23 billion
• Sonic Corp.:	SONC	\$ 1.17 billion
• Noodles & Company:	NDLS	\$ 1.09 billion

• Red Robin Gourmet Burgers, Inc.:	RRGB	\$ 1.02 billion
• BJ's Restaurants, Inc.:	BJRI	\$ 945.6 million
• Biglari Holdings Inc.:	BH	\$ 841.4 million
• Potbelly Corporation:	PBPB	\$ 641.4 million
• Chuy's Holdings Inc.:	CHUY	\$ 640.8 million
• Del Frisco's Restaurant Group, LLC:	DFRG	\$ 632.0 million
• Denny's Corporation:	DENN	\$ 602.6 million
• Ruth's Hospitality Group, Inc.:	RUTH	\$ 438.6 million
• Ignite Restaurant Group, Inc.:	IRG	\$ 354.2 million
• Ruby Tuesday, Inc.:	RT	\$ 347.6 million
• Bravo Brio Restaurant Group, Inc.:	BBRG	\$ 293.7 million
• Country Style Cooking Restaurant Chain Co., Ltd.:	CCSC	\$ 274.1 million
• Jamba, Inc.:	JMBA	\$ 222.8 million
• Einstein Noah Restaurant Group, LLC:	BAGL	\$ 221.6 million
• Nathan's Famous, Inc.:	NATH	\$ 220.8 million
• Famous Dave's of America, Inc.:	DAVE	\$ 204.3 million
• Luby's, Inc.:	LUB	\$ 179.7 million
• Carrols Restaurant Group, Inc.:	TAST	\$ 178.4 million
• Kona Grill, Inc.:	KONA	\$ 173.7 million
• Brazil Fast Food Corp.	BOBS	\$ 149.2 million
• Frisch's Restaurant, Inc.:	FRS	\$ 120.4 million
• Diversified Restaurant Holdings, Inc.:	BAGR	\$ 119.3 million
• Rick's Cabaret International Inc.:	RICK	\$ 112.9 million
• Ark Restaurants:	ARKR	\$ 72.5 million
• Pizza Inn Holdings, Inc.:	PZZI	\$ 51.8 million
• Eat At Joes Ltd.:	JOES	\$ 34.8 million
• Noble Roman's Inc.:	NROM	\$ 33.7 million
• Cusi, Inc.:	COSI	\$ 23.1 million
• Chanticleer Holdings, Inc.:	HOTR	\$ 20.9 million
• Good Times Restaurants Inc.:	GTIM	\$ 14.5 million
• Flanigan's Enterprises Inc.:	BDL	\$ 13.6 million
• Granite City Food:	GCFB	\$ 10.3 million
• Mexican Restaurants Inc.:	CASA	\$ 6.6 million
• Star Buffet Inc.:	STRZ	\$ 3.6 million

PART II: TRENDS FOR 2014

CULINARY TRENDS

5.1 Overview

The National Restaurant Association (www.restaurant.org) surveys member chefs of the American Culinary Federation (www.acfchefs.org) annually asking them to rank over 200 culinary items. The survey serves as the basis for a list of 'hot trends' for the coming year. This chapter presents the 2014 list.

5.2 Culinary Themes

The top culinary themes for 2014 are as follows:

1. Environmental sustainability
2. Children's nutrition
3. Hyper-local sourcing (e.g., restaurant gardens)
4. Gluten-free cuisine
5. Health/nutrition

5.3 Top Menu Trends

Chefs of the American Culinary Federation rank the top menu trends for 2014 as follows:

Full-Service Restaurants

1. Locally sourced meat or seafood
2. Locally sourced produce
3. Environmental sustainability
4. Healthful kids' meal
5. Gluten-free items
6. Hyper-local sourcing (e.g. restaurant gardens)
7. Children's nutrition
8. Non-wheat noodles/pasta (e.g. quinoa, rice, buckwheat)
9. Sustainable seafood
10. Farm/estate-branded items
11. Nose-to-tail/root-to-stalk cooking (e.g. reduce food waste by using entire animal/plant)
12. Whole-grain items in kids' meals
13. Health/nutrition

14. New cuts of meat (e.g. Denver steak, pork flat iron, tri-tip)
15. Ancient grains (e.g. kamut, spelt, amaranth)
16. Ethnic-inspired breakfast items (e.g. Asian-flavored syrups, Chorizo scrambled eggs, coconut milk pancakes)
17. Grazing (e.g. small-plate sharing/snacking instead of traditional meals)
18. Non-traditional fish (e.g. branzino, Arctic char, barramundi)
19. Fruit/vegetable sides in kids' meals
20. Half-portions/smaller portions for a smaller price
21. Hybrid desserts (e.g. cronut, townie, ice cream cupcake)
22. Non-wheat flour (e.g. peanut, millet, barley, rice)
23. Simplicity/back-to-basics
24. Quinoa
25. Unusual/uncommon herbs (e.g. chevril, lovage, lemon balm, papalo)

Quick-Service Restaurants

1. Gluten-free items
2. Healthful kids' meals
3. Spicy items
4. Fruit/vegetable sides in kids' meals
5. Locally grown produce
6. Locally sourced meats and seafood
7. "Build your own" items
8. Low-fat/non-fat milk or 100% juice options in kids' meals
9. Pretzels/pretzel bread
10. Flatbreads
11. Specialty coffee
12. Ethnic fusion cuisine
13. Organic items
14. Lower-calorie items
15. Sustainable seafood
16. Artisan/house-made items
17. Grain-based salads (quinoa, couscous, etc.)
18. Lower-sodium items
19. Snack-sized items
20. Lower-fat items
21. Egg white omelets/sandwiches
22. Whole-grain items
23. Asian/Asian fusion cuisine
24. Flavored/enhanced water
25. Smoothies

5.4 Top Trends By Category

By food category, the following are the top trends for 2014:

Appetizers

1. House-cured meats/charcuterie
2. Vegetarian appetizers
3. Ethnic/street-food-inspired appetizers (e.g., tempura, taquitos, kabobs, hummus)
4. Ethnic dips (e.g. hummus, tabbouleh, baba ganoush, tzatziki)
5. Amuse bouche/bite-size hors d'oeuvre

Breakfast/Brunch

1. Ethnic-inspired breakfast items (e.g., Asian-flavored syrups, chorizo scrambled eggs, coconut-milk pancakes)
2. Traditional ethnic breakfast items (e.g., huevos rancheros, shakshuka, ashta, Japanese)
3. Fresh-fruit breakfast items
4. Egg white omelets/sandwiches
5. Yogurt parfait/Greek yogurt parfait

Culinary Themes

1. Environmental sustainability
2. Gluten-free cuisine
3. Hyper-local sourcing (e.g. restaurant gardens)
4. Children's nutrition
5. Nose-to-tail/root-to-stalk cooking (e.g. reduce food waste by using entire animal/plant)

Desserts

1. Hybrid desserts (e.g. cronut, townie, ice cream cupcake)
2. Savory desserts
3. House-made/artisanal ice cream
4. Bite-size/mini-desserts
5. Deconstructed classic desserts

Ethnic Cuisines and Flavors

1. Peruvian cuisine
2. Korean cuisine
3. Southeast Asian cuisine (e.g., Thai, Vietnamese, Malaysian)
4. Regional ethnic cuisine
5. Ethnic fusion cuisine

Kids' Meals

1. Healthful kids' meals
2. Whole-grain items in kids' meals
3. Fruit/vegetable children's side items
4. Ethnic-inspired children's dishes
5. Oven-baked items in kids' meals (e.g., baked chicken fingers, oven-baked fries)

Main Dishes/Center-of- Plate

1. Locally sourced meats and seafood
2. Sustainable seafood
3. New cuts of meat (e.g., Denver steak, pork flat iron, teres major)
4. Nontraditional fish (e.g., branzino, Arctic char, barramundi)
5. Half-portions/smaller portions for a smaller price

Nonalcoholic Beverages

1. House-made soft drink/soda/pop
2. Gourmet lemonade (e.g., house-made, freshly muddled)
3. Coconut water
4. Specialty iced tea (e.g., Thai-style, Southern/sweet, flavored)
5. Dairy-free milk (e.g. soy, rice, almond)

Preparation Methods

1. Pickling
2. Fermenting
3. Smoking
4. Sous vide
5. Liquid nitrogen chilling/freezing

Produce

1. Locally grown produce
2. Unusual/uncommon herbs (e.g. chevril, lovage, lemon balm, papalo)
3. Dark greens (e.g. kale, mustard greens, collards)
4. Organic produce
5. Heirloom apples

Sides/Starches

1. Non-wheat noodles/pasta (e.g., quinoa, rice, buckwheat)
2. Quinoa
3. Black/forbidden rice
4. Red rice
5. Pickled vegetables

Other Food Items/ Ingredients

1. Farm/estate-branded items
2. Ancient grains (e.g., kamut, spelt, amaranth)
3. Non-wheat flour (e.g., peanut, millet, barley, rice)
4. Natural sweeteners (e.g. agave, honey, concentrated fruit juice, maple syrup)
5. Artisan/specialty bacon

6

FOOD & DINING TRENDS

6.1 Overview

This chapter provides summaries of forecasts for dining trends in 2014 based on the assessments of the following analysts and media sources:

- Andrew Freeman & Co. (www.afandco.com)
- Baum + Whiteman (www.baumwhiteman.com)
- *Bon Appétit* (www.bonappetit.com)
- Culinary Visions (www.culinaryvisions.org)
- Epicurious (www.epicurious.com)
- Flavor Forecast (www.flavorforecast.com)
- Mintel (www.mintel.com)
- Sterling-Rice Group (www.srg.com)
- *Supermarket Guru* (www.supermarketguru.com)
- Technomic (www.technomic.com)
- The Food Channel (www.foodchannel.com)

6.2 Andrew Freeman & Co.

Andrew Freeman & Co. forecasts the following restaurant and dining trends for 2014:

86 the Chicken

- Gone are the days when there was always a chicken dish on the menu for picky eaters. Restaurants are playing to more adventurous eaters and diners' palates have risen to the challenge.

Ahh...Veg Out!

- It's easier than ever to get your veggies: these traditional sidekicks are finding their way into cocktails, taking the place of meat in traditional dishes and adding an edge to desserts.

Artisan, Not Just for Ales

- The artisanal movement hits spirits – highlighting local, small-batch spirit makers is this year's farmer call-out.

Beyond the Tipping Point

- Are restaurants, servers, and diners ready for an update to our tipping culture? This hot topic has the industry buzzing and we certainly haven't heard the last of it – look for a move towards pooled tips and service charges.

Chef Coat Goes Lab Coat

- Restaurants are getting serious about the science behind cooking. The new flavors, techniques, and textures coming out of culinary laboratories are the future of food.

Cobb Karma

- Newfangled Cobbs are knocking Caesar off its pedestal as the king of salads.

Don't Get Drunk On An Empty Stomach

- Chefs are getting into the bar business in a big way. We're seeing a plethora of chef-driven bar concepts that offer thoughtful bites to pair with complex cocktails and wine programs. Similarly, traditional bars and wineries are adding composed dishes to their repertoire to enhance the tasting experience and encourage patrons to linger.

Eat Now / Text Later

- Restaurants are combating the lure of the small screen by getting serious with their cell phone policies. Put away your phone and focus on the food, the atmosphere, and the company.

Eat Your Adventure

- Restaurants are picking slower nights to delve into a theme or concept. Unique menus allow guests to travel without leaving their hometown and leave with a deeper understanding of a specific region, cooking style, or ingredient.

Everyone's a Critic

- As traditional media cuts more and more of their food coverage, the era of the anonymous food critic may be coming to an end. This is paving the way for a plethora of bloggers and freelancers with no shortage of opinions and huge rosters of followers. Bottom line? You never know who's dining in your restaurant and how their experience will shape the future of your business.

Everything Under The Sea

- It's our most precious resource and chefs are using it wisely and innovatively. From sea beans to fish cheeks, chefs are exploring the full bounty of the ocean and how to keep it a lasting resource.

Flights of Fancy

- Offer up flights of unusual and small batch spirits, maybe even pairing them with food, and let a night at the bar become educational.

Gettin' Nutty With It

- It doesn't just come from a cow. Pastry chefs, baristas, and bartenders are playing around with nut milks.

Gilded Chopsticks

- With upscale dining rooms and innovative, handcrafted menus to match, Asian food isn't just for takeout anymore.

Haute Homey

- Chefs are going back to childhood and having fun with familiar favorites. Highbrow versions of classic comfort foods are popping up all over menus, from appetizers to dessert.

Ice Ice Baby

- Ice isn't just for chilling – bars and restaurants are infusing their cubes with herbs and other ingredients to enhance the flavors or their cocktails.

It's a Movie, It's a Painting, No It's Live Art!

- Take artwork digital by using projection for still and moving pieces – it's easy to keep things changing without breaking the bank.

Kitchen Comes Tableside

- Old-school service meets new school standards as restaurants are breaking down the barriers between the kitchen and the diner with an updated return to tableside preparations.

Let's Get Oiled Up

- For cooking and finishing, chefs are going beyond olive oil. The flavors of avocado, hazelnut, and benne seed oils elevate dishes to new levels. Even mixologists are getting into the action with oil-enhanced cocktails.

Loca-Pour

- No longer the sole realm of Napa, more and more states are contributing to the growing American wine movement. Restaurants that have long embraced a locavore ethos are revising their wine lists to match.

¡Mas Vino, Por Favor!

- ¡Ay ay ay! Wines from the Iberian Peninsula are surpassing classic French varietals on restaurant menus across the country, spicing up wine lists with Spanish and Portuguese flair.

Mutant Morsels

- Chefs all over the country have gone mad scientist, creating hybrid versions of longtime crowd pleasers.

Niche Ethnic

- Restaurants like Fat Rice (Chicago, IL), which specializes in cuisine of Macao, and La Urbana (San Francisco, CA), serving the food of Mexico City, are examples of the specificity with which some restaurants are presenting their ethnic cuisine.

Not Your Grandpappy's BBQ

- Chefs are taking classic barbecue techniques to new heights by showcasing regional nuance and bold flavors. Barbecue culture is moving beyond roadside shacks and backyard smokers.

Perk Up, Eat Up

- As small batch roasters go mainstream and the public's interest in esoteric coffees brews, the food at your local coffee shop gets fancier too.

Raise the Bar, Lower the Lounge

- When real estate is at a premium, make the most of your space by going vertical. Restaurants are getting a height advantage by using basement and second story bars to create more seating, a bigger dining room, and a fatter bottom line.

Ride, Dine & Sign

- Restaurants, particularly in difficult-to-park-in neighborhoods, are partnering with transportation companies, from local taxis to luxury ridesharing company Uber, to encourage diners to ditch their rides for a discount.

Split Personalities

- Whether it's a casual café by day that transforms into fine dining by night or a restaurant that shares its space with a retail shop, restaurant real estate is doing double duty.

Still Poppin' Big Time

- Pop-up restaurants aren't just the purview of chefs. Brands, and even countries, are popping up for limited runs and causing a big stir.

Tea Time

- Tea is topping off cocktails and making a big splash whether served hot or cold

The Oldest Form of Cooking in the World

- Everything old is new again. Going beyond pickling, chefs are fermenting just about everything these days.

The Year of the Brasserie

- Diners are clamoring for the casual sophistication of the brasserie. Whether you crave steak frites or just a see-and-be-seen atmosphere, this style of restaurant appeals to the Francophile in all of us and will continue to grow in the coming year.

Tippler Nibblers

- Bite into your booze with cocktails that take a solid – and fun – form.

#tricksofthetrade

- Too noisy, too dark, too hard to find? Tech tools can help the Baby Boomers enjoy their dining experience. Restaurants can get in on the millennial action too by staying up on the latest in social media.

Voyer-Eating

- Savvy young chefs are sharing when, where, and what they are eating, cooking and doing on Instagram. Anticipation builds for fans and diners who can't wait to try what they've been seeing.

We All Scream for Ice Cream Sandwiches

- Move over cupcakes and donuts, there's a new treat in town – the ice cream sandwich.

When the Chips are Down

- Up the ante on chips 'n dip by subbing in alternatives to the traditional fried spud, tortilla chip or crostini.

Who Doesn't Love a Classic Comeback?

- Iconic favorites will be making a comeback in 2014, with the reopening of old standards under new management. Fresh face lifts prove everything old is new again.

Worth Their Weight

- No need to commit to just one varietal or region – pay by the ounce and sample as many wines as you can handle.

Yelp? Help!

- Restaurateurs are becoming increasingly concerned by the influence of Yelp reviews and are no longer sitting silently by. We predict the power of Yelp may be waning, but in the meantime restaurants are going so far as to create dedicated roles to publicly respond to reviews.

6.3 Baum + Whiteman

Baum + Whiteman annually develops lists of restaurant and hotel food trends. The following is Baum + Whiteman's 12 Hottest Food & Beverage Trends for Restaurants and Hotel Dining for 2014 + 31 Buzzwords:

Bubbling, Fizzing Beverage Trends

- Tea: Starbucks has taken the lead in converting Americans into tea drinkers with its 2012 acquisition of Teavana. The first new Teavana since the deal opened as a tea bar/cafe in Manhattan.
- Vermouth: Vermouth is the latest fixation of artisan bartenders.
- Sodas: The craft beer movement spawns craft sodas, and restaurants are crafting sodas using house-made fruit syrups and infusions.
- Sour Beer: Inoculating beers with wild yeasts and aging them in wood, craft brewers are turning out fragrant but sour beers.
- Pressed Juices: Juice bars are no longer for health nuts and body cleansers. Lots of investors pouring into cold-pressed juiceterias now that millions of people are demanding fresh fruit and vegetables in profuse combinations. Jamba Juice is repositioning from a smoothie chain and Starbucks' Evolution Fresh is becoming a lifestyle brand. Pressed juices plus booze make super-premium cocktails.
- Bar Culture Trendlets: Mixologists, mostly in hotels, are bottling their own small-batch carbonated cocktails. There are flavored ice cubes, flavor-mist essences over finished cocktails, and cocktails with house-made ingredients.

Chicken: No Longer Humble

- Chicken has gone haute, with restaurants around the country ramping up prices as they play flavor one-upmanship.

Fishy Fish

- Increasingly people are ordering anchovies ... especially Spanish salt-packed ones called *boquerones*, and even fresh ones. Fresh sardines, herring, and mackerel all are getting a second look.

Goodbye Food Courts, Hello Food Halls

- Cookie-cutter mall food courts serving repetitive same-old chain food are on the downslide. Enter upscale "food halls."

Green Is The Color

- Investments in healthy foods are finally paying off as a niche market rolls into the mainstream. More than one factor propels this profound market change: the gluten-rejecters, Paleo people, diabetics, weight challenged, vegetarians, vegans ... in addition to the influence of nutritionists as well as the First Lady.

I Lost My Dinner In The Funhouse

- Restaurants, aiming to enhance the dining experience, are redefining "eatertainment." Avant garde restaurant Ultraviolet, in Shanghai, shanghai's ten high-spending diners nightly to a secret room that radically shifts moods with each course ... uplights in the floor, 360-degree high-def projectors, swings in air temperature, four smell diffusers, 22 speakers, LEDs, waiters changing customers to suit the food. Chef-owner Paul Pairet calls it "psychotasting" ... you go from Zen

to hell in 20 courses over four hours in a night of sensory integration. Oh, yes, the food's pretty good. At the Casino de Madrid building, star chef Paco Roncero built a 9-seat invitation-only techno-dining room ... experimenting with relationships between food and perception. Diffusers control temperature and humidity, occasionally wafting aromas of mushrooms or grassy wetness ... a ceramic table heats or cools plates and vibrates on cue, and the audio-visual environment is tightly scripted. David Bouley's private dining room, called The Pass, contains a giant screen ... and guests in New York converse *in real time* with growers and vintners whose products are on the table ... even if the supplier is in Japan. At Dutch Design Week this year, Michelin starred restaurant Treeswijkhoeve collaborated with designer Junhyun Jeon in a five-course sensory menu served with tactile tableware focusing on the tongue-lips-mouth interface ... cups with nipples, ball-shaped spoons, and irritatingly spiky tasting surfaces (see photo) aimed at flipping or modifying perceptions of salty, sour, sweet, and bitter. Recent research reveals that people perceive round shapes as sweeter and jagged shapes as bitter. In Spain, the Roca brothers of Can Roca have projected images onto their dishes of food to heighten the experience ... and they've created *Il Somni*, a 12-act, 12-course banquet-opera based culinary history, memory, landscape, and poetry. In Barcelona, Adria's 41 Degrees plunges guests into an art installation ... music is cued to 41 globetrotting courses, images projected on to hanging glass shards. In Brooklyn, a restaurant serves meals in utter silence. And dining in the dark ... stimulating the remaining four senses ... spreads to cities around the world. This isn't just intellectual vapor ... beside the here-and-now experiences, these operators are exploring how combined sensory stimuli create powerful, emotional, and memorable ties between consumers and restaurants. One more thing you can't get at home.

Look Again At Mideast Cooking

- New tastes and dishes are coming from Turkey, Israel, Morocco, Iraq, and Iran. "New Israeli" cross-cultural cuisine includes ideas and techniques from all over the region.

New Wave Of Asian Flavors

- A new wave of Asian flavors (and menu items) has hit the mainstream. Sweet-spicy Korean dishes, flavors from Japan, and Thai and Vietnamese fish sauces are being found on more menus. Also, ramen is popping up everywhere.

Pop-Ups, Food Fairs, And The Single-Item Restaurant

- Weekend pop-up markets, such as Smorgasburg (Brooklyn, NY) and Ferry Terminal (San Francisco, CA) as well as food truck fairs are graduating to brick-and-mortar restaurants.

Proliferation Of Tasting-Only Menus

- There is a proliferation of tasting menus around the country. It's great for

restaurants' economics, guaranteeing a specific average check along with pre-costed, highly controlled inventory.

Restaurants in Retail Stores

- Retailers are revisiting the tradition of the department store cafe. The reason: Keeping hungry customers on the premises longer and they buy much more.

When Butter's Not Enough

- Creative spreads like black garlic mostarda, vanilla tapenade, tomato jam, and salted butter are gracing patrons' tables at restaurants. There is also whipped lardo, rosemary hummus, roasted garlic butter, smoked ricotta, whipped beet butter, porcini oil, jalapeno oil, smoked eggplant dip, salsa butter, and whipped chicken liver butter.

Buzzwords For 2014

- **Banh mi** makes it onto Western menus
- **Boneless lamb neck**
- **Buckwheat** is grain of the year ... even if it's not a grain
- **Chicken skin**
- **Coconut** everything
- **Delivery, high-priced, and fast food**
- **Filipino food**
- **Fluke** is fish of the year ... octopus second ... trout third
- **Food waste** crackdown
- **High-proof spirits**
- **House-fermented food**
- **House-made fruit vinegars** for vinaigrettes and cocktails
- **High-priced vegetarian tasting menus**
- **More beer and wine in fast-casual chains**
- **Gin**: gin bars and gin-tonic bars
- **Hipster Asian** restaurants
- **Jerusalem artichokes**
- **Jewish fusion**
- **Kale** still rules but cauliflower's working forward
- Made-to-order **liquid nitro ice cream**
- **Mexican sandwiches** like tortas and cemitas
- **Paleo** dieters add to gluten-free demand
- New uses for **pretzels**
- Consumers' newfound **protein** obsessions
- **Rose** wines all year long
- **Shakshuka** (look that up, too) will appear on breakfast and brunch menus.
- **Smart phones, tablet computers** speed ordering and payment, cut service staff
- **Sorghum** becomes a trendy sweetener

- **Sweetbreads** make a comeback
- **Sweetened and flavored whiskeys** ... smoked, mapled, honeyed
- **Teres major**

6.4 Bon Appétit

Bon Appétit's editors identified the following food trends for 2014:

A New Fish Story

- For years, trout and branzino (a.k.a. Mediterranean sea bass) dominated the whole-fish choices on menus. It's time to welcome porgy to the table. Pok Pok's Andy Ricker explains: "It's relatively abundant, inexpensive, mild-tasting, and works well in pretty much any whole-fish preparation. It also has lots of small bones, which is why you'll rarely see it filleted."

Bronze Goddess

- What's that feathery frond topping your fish? And crowning your cucumber salad? It's bronze fennel, the garnish du jour. Expect more and more chefs to fall for its mild anise flavor and dashing good looks.

Different Yolks

- The brilliance of a masterfully fried egg is indisputable. At Blue Hill at Stone Barns in (Pocantico Hills, NY) yolks are cured and aged, then grated over pasta. At Alma (Los Angeles, CA), they're candied in a sugar bath and torched for a one-bite, crème brûlée—decadent dessert.

Manilla Flavored

- From sinangag (garlicky fried rice) to kinilaw (raw fish salad), 2014 will be all about Filipino-inspired food and flavors. Whether or not balut – fertilized duck egg – catches on remains to be seen.

Pancakes for Dinner

- Not the butter-and-syrup kind but savory ones made with sourdough batter and studded with sea urchin, squid, smoked sturgeon, and the like.

Reclaimed and Revived

- Once upon a time, some frat boy dropped a shot glass of whiskey into a beer, guzzled it, and stole the name Boilermaker. I'm taking it back to its original meaning: a shot and a beer. These days, bars everywhere are riffing with next-level combo deals.

Restaurants Get Greener

- The next restaurant design trend is growing – literally. It's more "living" walls, hanging ferns, miniature potted plants on tabletops, and shelves of crazy-cat-lady

succulents than ever before. Spotted at: Toro (New York City), Table (Washington, D.C), Xiao Bao Biscuit (Charleston, SC), Juvia (Miami, FL).

Spice Marketing

- First it was smoked pimentón, then Aleppo pepper. The new spice crush is za'atar, the Middle Eastern blend of sumac, sesame seeds, and dried herbs. It's showing up on menus from Levant (Portland, OR) to Glasserie in (Brooklyn, NY) but it's so versatile.

The Burrata Challengers

- Fossa, scamorza, and Cloumage: Sounds like a law firm, but they're actually the names of today's coolest cheeses:
 - Fossa: Italian for "pit," it refers to the place where this sheep's-milk cheese is aged. Spotted in: Kohlrabi salad with hazelnuts and mint at Estela (New York City)
 - Scamorza: An aged (and sometimes smoked) mozzarella-like cheese, often seen hanging up in old-school Italian delis. Spotted on: Margherita pizza at Bufalina (Guilford, CT)
 - Cloumage: The proprietary name of a fresh-curd cow's-milk cheese made at Shy Brothers Farm (Westport, MA). Spotted in: Garganelli with lamb-neck ragù at Sorellina (Boston, MA).

The Next Big Food Town: Yes, Steel City is where you need to eat now

- Like Houston, Charleston, and Nashville before it, Pittsburgh is elbowing its way onto the culinary map. Here are four reasons why:
 - The East Liberty neighborhood, with its \$52 million transit center and future Ace Hotel.
 - Farmers' markets everywhere, including Farmers @ Firehouse in the Strip District.
 - Restaurants like Cure, Bar Marco, Conflict Kitchen, Notion, Fukuda, and Meat & Potatoes
 - Serious beer (The Brew Gentlemen) and cocktails (The Livermore and The Butterjoint).

6.5 Culinary Visions

Since 2002, Culinary Visions has collected insight into menu trends from chefs, foodservice professionals, and consumer foodies. This insight provides the basis for an annual list of food trends. Culinary Visions' *2014 Food Trends* is as follows:

Adult Kid Food

- Kid food with grown up taste and appeal was all the rage. The classic PB&J (Peanut butter and Jelly) was reincarnated in many different ways. Miniature bites, luxury candy bars, healthy snacks, granola, and cupcakes featured flavors of this

“kid classic.” One featured artisan talked about their mission of bringing wine country quality to a gas station snack with their gourmet jerky for discriminating patrons. Elegant popcorn flavors like sea salt caramel and pumpkin pecan praline added gourmet flair to a favorite snack.

Artisan Reinvented

- A new campaign by the Specialty Foods association featured a wide range of specialty food makers with unique products and a passion for the food business. One could not help but notice that many were in the food business as a second and even third career – from nurse to lawyer to shepherd.

Capturing The Trends on a Market Tour

- Insider tours of the San Francisco neighborhoods are a great way to experience the trends in action. The Bi-Rite Divisadero is a great example of what urban retailers can do to capture the hearts of neighborhood customers. Their website proudly proclaims that they serve their community with love, passion, and integrity. Visiting the store demonstrates the promise is real. The 24th Street Cheese Market has been serving up specialty foods from near and far for over 30 years. The windows are covered with a mosaic of handwritten signs featuring everything from local honey from Berkeley to figs from Calabria. Their local and global cheese selection is exceptional and customers are warmly guided to the best choices for their taste. The manager is delighted to talk about how she curates all of the offerings for their well-traveled clientele.

Chocolate and Beyond

- There is no denying the importance of chocolate when it comes to specialty food. It is impossible to taste every variety at the Winter Fancy Food Show, yet there was also a lot of buzz about non-chocolate candy. Vosges Haut Chocolatier is always a popular destination at the Winter Fancy Food Show, and this year visitors were clamoring to taste their blood orange caramel in addition to their new chocolate creations with mushrooms and coconut ash. Other notable offerings in the non-chocolate confection category included pure maple candy, superfruit chews, and made to order sea salt caramels.

Elevated Everyday Foods

- Nearly two-thirds of what specialty food consumers buy is for everyday meals. For breakfast, products like ginger pear macadamia toasted muesli and carrot cake super premium oatmeal make everyday breakfast a luxury experience. For those who would rather drink their breakfast, oatmeal-based beverages are available in several flavors and are vegan-friendly and gluten free. Jerky moved way beyond the expected convenience store snack items with offerings like wild salmon jerky, filet mignon jerky, and roast red chile chicken jerky.

Faux, but not Fake

- At the Winter Fancy Food Show there is a reverence for real food. There is also an appeal to alternative products that are not imitation, like Beyond Eggs, a sustainable plant-based alternative to real eggs. Beans and legumes were also getting the spotlight in snack foods, dips, side dishes, and center-of-plate demonstrating that protein replacement does not have to offer imitation meat products to be appealing.

More Exotic Salts

- Gourmet salts have been a subject of the Culinary Visions forecast many times, and just when we thought we said it all some new varieties emerged at the Winter Fancy Food Show as line extensions on the classic sea salt. Varieties of sea salt included hand-harvested, flakey, smoked, and fusion flavored.

Snacking Healthier

- It's no secret that snacking has become a way of life for most Americans and healthfulness is becoming more important, particularly to millennial consumers. A new study by Y-Pulse® (www.ypulse.org) found that 85% of Millennials said that healthfulness was an important factor in their choice of snacks; yet they were often challenged by availability of healthy snacks. Solutions to this consumer dilemma could be found in almost every aisle at the Winter Fancy Food Show. Notable items that met the healthy requirement without compromising on taste included: dark chocolate pumpkin seed BarkThins, toasted sesame and seaweed popcorn, cinnamon twist all natural trail mix, and crunchy chocolate chickpeas. Chia is the ingredient du jour in healthy snacks including chips, crackers, dips, cookies, and beverages.

Taste Talk Tweet

- Tweeters noticed many new products at the Winter Fancy Food Show reflective of food trends, including nut butters made with super foods, uses for all parts of the coconut, iced tea topped with tea-infused sea salt, and sriracha in everything. Many were excited to discover new snacks such as pasta chips, egg white chips, pre-Incan-inspired corn snacks, and regional products like Alabama-style white BBQ sauce. Jelly Belly unveiling their new flavor, draft beer, garnered awe and disbelief from some, while others speculated about Peruvian food replacing Thai as the “new” ethnic flavor ripe for discovery.

Wow Waters

- Coconut water is going mainstream with both liquid and dehydrated products to keep consumers healthfully and deliciously hydrated. Almond water is also gaining a following with line extensions in adventurous flavors like licorice mint. Herbal waters in lemon verbena geranium and lavender mint were enticing. Hawaiian volcanic water boasts health and environmental benefits because of recycled containers and significant water donations to people in need.

Culinary Visions suggests implications of new trends as follows:

Flavors to Explore

- Greek is the world flavor on display this year. Greek yogurt has reached the point of ubiquity as a snack and an ingredient and now the broader cuisine.

Feed More Than The Appetite

- Consumers are interested in companies that make good things and make the world a better place.

Small Batches and Hand Crafted

- Small batches, hand crafted foods, and boutique flavors continue to captivate retailers and consumers looking for the secret find.

The Go-Anywhere Gourmet Experience

- Consumers enjoy treating themselves to a gourmet experience even when they are on the go with flavorful, convenient snacks that literally can be tossed in a bag or a backpack.

6.6 Epicurious

Epicurious, a Condé Nast blog, predicts the following culinary trends for 2014:

Amaro Fills Up Cocktail Glasses

- Prepare for things to get bittersweet at your local watering hole in 2014. Amaro, the Italian digestif made from herbs, fruits, barks, and spices steeped in booze and then sweetened and aged, will become more important than well-groomed beards and suspenders at the country's hip cocktail bars. Perbacco (San Francisco, CA) uses it to add depth to otherwise sweet cocktails. Osteria Mozza (Los Angeles, CA) stocks up to 80 different kinds for on-the-rocks sipping. And Colorado distillery Leopold Brothers has produced the first American-made amaro, Fernet Leopold.

Beef Heart is the New It Dish

- Chefs will get to the heart of nose-to-tail dining in 2014 by spotlighting beef heart. The cut was once eaten only out of necessity, but as offal is no longer seen as awful, beef heart is finally taking center stage. Danny Bowien's Mission Cantina (New York City) serves it up in a ceviche with hokkaido scallops. The Arsenal (Washington, DC) goes the tartar route with shallot, celery leaf, chive, and pickled mustard seed. And Rye Bar at Capella (Washington, DC) goes bourguignonne with a black truffle potato foam. Home cooks would do well to get in on the action: Beef heart has the flavor of steak at a fraction of the cost.

Brunch Israeli-Style

- Move over eggs Benedict. The brunch dish of 2014 will be shakshuka. Thanks to London it-chef and cookbook author Yotam Ottolenghi, foodies are turning their

tastebuds towards Israel. And no dish will be more sought-after than this eye-opening breakfast dish of eggs poached in a spicy tomato sauce. Line up for the version at Portland's Tasty n Sons, which is topped with merguez sausage.

Cast-Iron Pans Are The New Plate

- Eating food right from the pan was once considered the uncouth territory of plateless college kids. But cast-iron skillets are riding the downhome Americana craze from the kitchen right into the dining room at high-end restaurants. James Beard Award-winning Husk (Charleston, SC) keeps its Benton's bacon-studded cornbread piping hot by serving it up in a mini cast-iron skillet. Woodberry Kitchen (Baltimore, MD) cooks up everything from blood sausage and trotter gravy to oxtail and hominy stew in skillets. At The Smith (New York City), gooey mac and cheese gets a crunchy crust when served in its cast-iron skillets.

Chef-Helmed Airport Lounges Take Flight

- After years of choking down cardboard to-go pizza and overpriced in-flight snacks, there's finally some good news for foodie fliers: chef-helmed airport lounges. The new Vegas Centurion Lounge partnered with Scott Conant of Scarpetta fame; Pegu Club and Gramercy Tavern mixologist Jim Meehan; and wine expert Anthony Giglio to craft their food and drink menu.

Chewing the Fat

- The FDA may be banning trans fats, but your waistline isn't safe just yet. Lesser-known animal fats will take center stage at restaurants in 2014. Spotted Trotter (Atlanta, GA) serves up several varieties of crepinettes, heavenly little sausage parcels bound up in caul fat (the delicate lacy membrane surrounding cow, pig, and sheep organs). Purple Pig (Chicago, IL) and Del Posto (New York City) have been whipping up lardo as a sinfully porky alternative to butter. And Portland (Oregon) has not one but two restaurants named after Lardo with menu items like a porkstrami burger with cheddar and lardo sauce and lardo fries dusted with parmesan and fried herbs.

Cocktails Sober Up

- In 2013, brew nerds toasted the rise of session beers, lower alcohol content beers perfect for all-day sipping. Expect to see a similar trend mixing up a bar menu near you in 2014. Big on flavor, lighter on booze, session cocktails often pair better with food and put it-draughts like vermouth and Lillet Blanc center stage. Drink in the trend at The Whistler (Chicago, IL), which mixes an Americano-style cocktail with Cynar and Cocchi Americano Rosa.

Cuckoo For Coconuts

- The dominance of coconut water in 2013 reminded us that there's more to that tropical fruit than spring break piña coladas. Expect to see everything from the meat to the milk popping up on menus in 2014. Bourbon Steak (Washington, DC), got a

jump on the trend, pairing shaved young coconut with seared tuna and mango ravioli. And, for old time's sake, you can revisit the piña colada in its deconstructed form at Hospoda (New York City) thanks to pastry chef Lukas Pohl.

Destination: Tasmania

- Farewell Portland. 2014's big foodie destination is in the land down under. Long known for its wines, Tasmania's locavore-mad food scene has taken center stage with nine cooking schools; a coast-to-coast tasting trail that takes you to berry farms, creameries, truffle hunting operations, and cider presses; and seafood tours that let guests help harvest oysters and fish for/smoke the region's famous salmon. That's all in addition to buzzy tasting menu restaurants like Garagistes, The Source, and Ethos. In 2014, they're redeveloping a former newspaper warehouse into a creative hub with a restaurant by star chef David Moyle.

Hotels Bed Down with Chefs

- Lots of hotels decided to ditch room service in 2013. But food is more important to travelers than ever. So hotels have started to team up with chefs. Take Los Angeles's insanely hip new Line Hotel, a collaboration between bad-boy chef Roy Choi and the Sydell Group (of New York City's NoMad hotel fame). And when cult California pop-up Le Comptoir had to decide where to open their first permanent location, they opted not for a traditional restaurant but for a spot in the retro-glam Normandie Hotel (Los Angeles, CA).

Octopus Spreads its Tentacles

- Charred, roasted, or fried, octopus is finding its way onto menus nationwide. Our favorite iterations so far? The octopus hash at Bucato (Los Angeles, CA), the apple-braised kale and mezcal octopus salad at Comodo (New York City), and the octopus carpaccio with ika shoyu and red-wine vinaigrette from Mizumi at the Wynn Las Vegas. Then there is the signature dish at Pearl & Ash (New York City), octopus marinated in togarashi for 24 hours, cooked in mirin for another 24 hours, fried, and then served with a sriracha-tinged glaze, purple shiso leaves, and a sunflower seed puree.

Old-school Grains are the New-school Quinoa

- Kaniwa, freekah, kamut, teff, and amaranth. They're the nutrition-packed, ancient grains that will give quinoa a run for its cult-superfood money in 2014. You can already find them ground into crackers at farm-to-table standard bearer Blue Hill (New York City), cooked up into savory risotto-like porridge at Lower48 Kitchen (Denver, CO), or made into pasta at Mulberry and Vine (New York City).

Pastries From Paris

- Parisian import Dominique Ansel made pastry history in 2014 with the Cronut. But 2014's sweetest French imports will be more traditional in nature. First up? The canelé, the custardy, caramelized mini-bundt pastry that has an entire bakery to itself

at Canelé by Céline (New York City). Hot on its heels will be the éclair, which has experienced a renaissance at jewelbox Parisian bakeries like L'Éclair de Génie and L'Atelier de L'Éclair.

Planting Some Seeds

- “Chi-chi-chi-chia” just might be the theme song of 2014. Not for those infomercial plant pets but for the seed. The antioxidant-packed, high-fiber chia seeds have become a health-food darling, finding their way into everything from smoothies to salads. But they're not the only seeds in the mix. Chefs are looking to sesame, pumpkin, and sunflower seeds as well for added texture and nutrition. Think seaweed sesame crepes at Eight Turn Crepe (New York City), burnt carrot salad with pumpkin seeds at Metropole (Cincinnati, OH), and bison carpaccio with horseradish, mushrooms, and crunchy seeds at Proof on Main (Louisville, KY).

6.7 Flavor Forecast

Since 2001, the Flavor Forecast (www.flavorforecast.com) has spotlighted emerging trends that are expected to drive flavor innovation over the next several years. The forecast is developed by McCormick & Company.

The Flavor Forecast 2014 is as follows:

Charmed by Brazil

- The world is about to shine its spotlight on Brazil, illuminating the vibrant flavors and traditions of a dynamic melting pot culture that includes European, African, Asian, and native Amazonian influences. Brazilian tastes are poised to emerge as a powerful influence in cooking around the globe.

Chilies Obsession

- The world is craving heat in a big way: Beyond just discovering new chile varieties, this obsession has extended into using techniques like grilling, smoking, pickling, fermenting, and candying to tease out their flavor potential.

Clever Compact Cooking

- Big flavor can come from small spaces: As the movement toward more efficient compact kitchens grows, inventive urban dwellers are discovering creative, cross-functional ways to prepare flavorful meals making the most of what's available.

Mexican World Tour

- Mexican flavors are on the move: From a growing taste for regional Mexican fare in North America to early exploration in China, cultures across the world are embracing authentic elements of this bright, bold, and casual cuisine.

Modern Masala

- Indian food is finally having its global moment: Already familiar with basic curries, people around the world are taking their appreciation for this richly-spiced cuisine to the next level, exploring more flavors in new contexts, from food trucks to fine dining.

6.8 Mintel

Mintel identified the following five trends that are expected to impact the restaurant industry in 2014:

Due Demographic Diligence

- Operators have been obsessed with Millennials. It's understandable, as they are the ones most likely to dine out in almost every restaurant segment. However, other demographics also present growing opportunities:
 - Hispanics tend to dine out in larger groups and their population is increasing. Their spending power is expected to reach nearly \$1.7 trillion by 2017, meaning serving this rapidly expanding community will be key to growth.
 - Women visit restaurants less than men due to their being more health- and budget-conscious. This suggests restaurants need to do more in terms of pricing, atmosphere, and menu to gain momentum with this group.
 - Baby Boomers enjoy dining out and have more disposable income than other demographics, but few marketing campaigns specifically target them.

Fast-Casual Pulls Ahead

- The impressive growth of the fast-casual segment demonstrates consumers, who are still focused on price, are willing to pay more for foods they consider to be of better quality or healthier. A slew of new concepts focusing on customization, speed of service, and convenience have sprouted. These include higher quality burger chains; concepts more firmly focused on health, and a rash of pizza restaurants that can deliver a fully-cooked, customized pizza in a matter of minutes.

Open Book Business Practices

- More than ever, foodservice consumers are questioning the origin of their foods and they are demanding transparency not only in ingredient sourcing, but in general business practices, including the treatment of animals and employees. Consumers are interested in patronizing restaurant brands that reflect their own values. Concepts that understand this and offer more information about their green practices or the causes they support stand to reap the rewards of increased loyalty.

Premium Proves Practical

- Not to be left behind, full-service concepts are mimicking the winning ways of fast-casual restaurants. For example, several full-service brands are testing or have launched concepts that utilize the speedier fast-casual service model. This is

important especially during the lunch rush, when consumers don't have the time to wait. Other tactics include launching healthier, more flavorful menu items and employing technology to speed up the dining experience.

Technology Interface Revolution

- Restaurants are increasingly using technology to cut service times, and to offer loyalty programs, promotions, and discounts electronically. Furthermore, in-store tabletop tablets and menu boards offer nutritional and other information, while reducing order, wait, and check out times. Brands are redesigning their websites to allow consumers to gain all the information they want with as few clicks as possible. This includes making their sites more attractive and useful via smartphones, which consumers rely on more and more for staying organized and gaining information.

6.9 Sterling-Rice Group

Sterling-Rice Group foresees the following as cutting-edge dining trends in 2014:

Dairy Goes Nuts

- No cows or milk pails required in 2014. Instead, culinary leaders will turn to cashews, almonds, and peanuts to make their milk. This lush, nutty “dairy” will bring round, rich flavors – and a wholesome twist – to sauces, drinks, and dinners.

Lemon Steps Into The Sun

- Lemon – the often underappreciated bright side of dressings, sauces, and more – will step into the spotlight in 2014. The simple, vibrant citrus will show up in its purest form – juice. But also watch out for it as a preserve, an addition to yogurt, and a star pastry ingredient.

No Ordinary Pasta

- Spaghetti, angel hair, and penne, step aside. Out-of-the-ordinary pastas will define 2014. The traditional wheat variety, crafted in Italian tradition, will be passed up in favor of dough made with alternative flours, seasoned with global spices (think Southwestern pasta), and formed into new shapes of all sizes.

Refined Classic American Meats

- Burgers, hot dogs, and milkshakes will take a backseat in 2014 to the finer tastes of American classics. Wedge salads doused in creamy bleu cheese dressing, meaty steak tartare, and other straight-forward, full-fat foods will unapologetically serve up rich, familiar tastes that are hard to resist.

Seaweed Goes Beyond Sushi

- Sushi may have introduced the culinary scene to the wonder of paper-thin sheets of earthy seaweed, but 2014 will teach foodies to think beyond the California roll.

Seaweed will be a salty snack, an umami-rich seasoning, and a light, crispy finisher that's sustainable, nutritious, and full of deep, salty flavor.

Tea Leaves The Cup

- Tea is no longer relegated to rainy afternoons with scones. Black, green, and other leafy brews will stretch into dinner, desserts, and more, as chefs and product developers experiment with tea's natural, earthy tastes and ways to bring flavorful twists to foods – without depending on butter, bacon, or oils.

The Middle Eastern Mediterranean

- Americans have long loved the Mediterranean for its healthy, richly flavorful cuisine. In 2014, they will enjoy more of it. The flavors of Turkey, Israel, and other areas of the Middle East will join pizza, garlic, and chickpeas in popularity. Expect to taste the flavors of sumac, za'atar, aleppo peppers, and more.

The New Flavors of Farm-To-Table

- As foodies have turned their backs on industrially produced meat, they've filled their plates with a variety of protein replacements. 2014's round of alternatives will be the most exotic yet. Goat, rabbit, and even pigeon meat raised by small-scale producers will give choices that we can feel good about and a new palette of flavors for experimenting in the kitchen.

The Return of Poaching and Steaming

- Poaching and steaming often get the short shrift. Too often these techniques conjure up memories of über-healthy, supremely bland meals. 2014, however, is going to put the flavor back into these cooking processes. Wine, coffee, beer, and even smoky liquids will replace water for poached and steamed proteins and vegetables, full of delicate, nuanced flavor.

The Year of The Yolk

- Recent years have found eggs making their way across the menu, from bowls of ramen to burgers. 2014, though, will ditch the whole egg in favor of the yolk only. That creamy, decadent, golden globe will reign, bringing meals a richness that was previously provided by cheese, dairy, and sauces.

6.10 Supermarket Guru

Phil Lampert, editor of the *Supermarket Guru* (www.supermarketguru.com), identified the following trends to watch in the food industry in 2014:

Better for You Snacking

- The NPD Group found that as snacking increased, so did an individuals' overall diet quality. Healthy options are on the rise. Look for supermarkets to replace high-sugar, high-fat snacks at the checkout with healthier on-the-go offerings.

Brands Reach Consumers Locally Through Cause Initiatives

- In 2014, brands will find greater purpose in serving the larger community. A ConAgra Foods survey found that 62% of consumers appreciate and want to support companies that donate to important social causes.

Click to Cook

- People rely more on their mobile phones when grocery shopping. Next: the ability to select a recipe, order ingredients and check-out directly from mobile devices or in-car touch screens and drive-through windows for quick order pickup.

International Restaurant Flavors At Home

- From school cafeterias to the dining room table, global flavors are sprouting up everywhere. Kids become exposed to global cuisine flavors much younger, so international flavors will be more accepted by them and their palates will become more sophisticated. Kids influence nearly 80% of purchase decisions by families, so look for all shoppers to be eating more internationally inspired foods.

Millenials Make the Supermarket Social

- Fifty-seven percent (57%) of Pinterest, is made of food related content with one-third saying they have purchased food or cooking items after seeing them on site, according to a survey by PriceGrabber. Next up: “click to buy” for consumers looking to purchase ingredients for a recipe on Pinterest and have them delivered to their homes.

Packaging Evolves to Share More with Consumers

- Consumers want more information but space on the package is limiting. Using a mobile device, shoppers will learn more about an ingredient or health claim by simply focusing the device on the label to tell where the ingredients come from, who prepared the food, the company’s history, and even offer other customer reviews and ratings.

Rise and Shine – The New Way to Start Your Day

- Breakfast remains one of the most important meals of the day. In 2014, consumers will look to add more protein to their first meal, to live a healthy lifestyle without compromising taste and indulgence. Look for more protein-rich and convenient breakfast options.

Supermarkets – The New Culinary Schools

- Grocery stores create “community cooking centers” where shoppers can collaborate and learn from each other, just as they have been doing in social media – now it’s better and in person!

The Emergence of the “IndieWoman”

- Almost 31 million strong, the “IndieWoman” is 27 and older, lives alone, has no children, and spends \$50 billion on food and beverages each year. They have no time, so look for more brands to offer more semi-homemade meals that use fresh, high-quality ingredients.

The Retailer Becomes the Brand

- A ConAgra Foods survey found that 53% of consumers shop at a particular retailer because it has good store brand products. No longer will private brands just emulate national brand products, but consumers will see more private label brands creating new unique products.

6.11 Technomic

Technomic foresees the following restaurant trends in 2014:

Convince Me It’s Real

- Consumers want assurances that what they’re eating is real – in every sense of the word. Today’s menus describe items far more thoroughly, listing not only the ingredients but also where they came from and how they were prepared. Local sourcing is more important than ever, but beyond that is the idea of being true to place. If the restaurant positions itself as authentically Italian, for instance, it must use ingredients sourced from Italy and/or prepared using authentic Italian methods.

Creamy, Cheesy, High-fat Goodness

- The demand for healthier eating is real, but so is the backlash. There’ll be even more cheese melts, pasta with creamy sauces, fried appetizers, and sides, and oddities like doughnut-based sandwiches. Don’t take super-indulgent items too seriously, though; outrageous LTOs like Wendy’s nine-patty burger are crafted more for social-media buzz than for eating.

Day for Night

- Consumers are less likely to eat according to a three-square-meals schedule; they nosh, skip meals, eat breakfast for dinner, and vice versa. More restaurants are introducing innovative breakfast items – like chicken, turkey or steak breakfast sandwiches or super-spicy wraps with chipotle or Sriracha – often available all day. And while breakfast-and-lunch-only concepts are building a niche, other operators are promoting late-night breakfast menus, often in conjunction with 24-hour drive-thru service.

Every Daypart is a Snack Daypart

- As the snacking lifestyle goes mainstream, diners are paradoxically less interested in snack menus per se. Millennials see dollar and dollar-plus menus as the snack menu. LSRs are paying more attention to snack-size handhelds and car-friendly

packaging; they're also stepping up their game with grab-and-go or market-style offerings. As FSR customers move away from meat-and-potatoes meals, operators are catering to the snacking-and-sharing ethos with pairings, trios, and flights from all parts of the menu – from soup trios to beer samplers to retro popsicle-flight desserts.

Everything is Political

- Deliberately or inadvertently, restaurant operators got caught up in political controversy as never before in 2013. Some suffered customer backlash after expressing views related to Obamacare, family values, or other topics; others saw increased traffic. Consumers are increasingly aware that the personal is political – that their choices and those of the restaurants they patronize regarding food, treatment of employees and suppliers, sustainability, and the environment have real consequences. Consciously or unconsciously, they will gravitate to concepts that share their worldview, and some restaurants will promote this cultural identification.

For Fast Service, Bring Your Own Device

- The fast-casual service model has hit a hiccup: customers specifying every ingredient in their burrito or sandwich make for a slow service line. Operators in every segment are finding new ways to use technology for faster, more accurate ordering. iPad orders placed tableside will be a point of differentiation for a few tech leaders, but we'll primarily see a bring-your-own-device system of advance and inside-the-restaurant ordering – as well as more customer feedback and interactive conversations. In the back of the house, increased use of iPad communication will make new menu items easier to roll out.

On Tap

- Tap technology is revolutionizing the beverage world: barrel-stored cold-brewed coffee that can be sent through repurposed beer taps, facilitating a new kind of coffee bar; soda-water taps that allow chefs to create their own fruity soft drinks; wine-on-tap tasting stations in high-end supermarkets; keg-wine bar concepts and retrofits; RFID-card-controlled self-serve beer-tap walls at high-tech pubs.

Pucker Up

- Forays into less-familiar ethnic cuisines, from Korean to Scandinavian, are partly responsible for growing interest in pickled, fermented, and sour foods. Korean kimchi as well as pickled onion, jalapeño, ginger, radish, and more are showing up everywhere from ethnic eateries to burger joints. On the beverage menu, the trend is seen in sour cocktails as well as new flavor combinations with sour notes – a reaction to 2013's candy-sweet drinks.

Pushing The Parameters Of Proteins

- Rising commodity costs for beef mean (of course) that chicken will be big again in 2014. However, the latest protein star is pork – appearing in regional barbecue

items, in Hispanic and other ethnic fare, in charcuterie, and as pulled-pork sandwiches. Also getting time in the spotlight are lamb and game meats, from duck to bison. Beyond meat, look for creative center-of-the-plate egg dishes as well as vegetarian alternatives, from mushrooms to beans to soy-based products like Gardein and Chipotle's Sofritas.

Return of the Carbs

- Starches are staging a comeback – from ramen to buckwheat noodles to pasta made with unusual ingredients. Rice bowls, jasmine rice, basmati rice, and brown rice will be big, in part, because of continued fascination with Asian fare and, in part, because of an association with healthfulness. Look for more in the way of flatbreads, wraps, and all kinds of artisan breads, including healthy whole-grain varieties. Waffles as a base or side make traditional savory items like chicken seem edgy.

Major developments influencing adult beverages in 2014 will include the following (source: Technomic):

Cider Stakes Its Claim

- The presence of major beer suppliers in the cider market – including AB InBev, MillerCoors, Heineken, and Boston Beer Company – further bolsters the category's availability, visibility, back bar and retail shelf placement, and its appearance on bar and restaurant drink lists. Seasonal and specialty ciders add to the excitement. At the same time, smaller producers continue to grow, bringing unique offerings to the mix.

“Come Together” is a theme for both products and categories

- Hybrid products and drinks that mix categories abound: beer and spirit cocktails, alcohol milkshakes, and products that combine categories (such as Malibu Red or Blue Moon Vintage Blonde). These blended offerings afford new taste experiences, inviting experimentation, and innovation both at home and in restaurants and bars.

Hotel and High-end Nightclub Drink Sales Ramp Up

- Hotel bars and restaurants realize strong adult beverage program growth as they continue to invest and innovate, while high-energy, high-end nightclubs outperform the industry overall on drink sales.

Independents Innovate and Grow

- Nimble and motivated, independent retail and on-premise operators take the lead on many trends to differentiate, connect with consumers, ramp up service elements, and realize sales growth, ultimately outpacing chains. At the same time, many independent restaurant and bar operators feel comfortable raising drink prices.

Next-Level Craft Beer Rises

- A double-digit growth rate continues for craft beer but slows as consumers and operators seek clarity in defining the category as well as relief from the often overwhelming number of new brewers, brands, and styles. Also, craft distilling continues to expand, delivering small-batch spirits to consumers eager for unique, artisan, and “authentic” libations.

On-Premise, More Drinks On Tap Turn Up

- Wine, cocktails, craft beer, and cider duke it out with traditional offerings for tap handles at the bar, on tabletop tap systems, and on sampling systems. Consumers embrace the notion that wine coming out of a keg or tap is often of equal quality to bottled product, and high-end producers move toward the quickly evolving keg wine packaging. Operators and suppliers collaborate to address the challenges of tap cocktails and of managing the rotation of seasonal craft beer and cider through category management.

Sweet Survives In Spirits But Makes Room For Spicy and Herbal Flavors (and more)

- Dessert- and confectionary-flavored vodkas abound, but they are joined by an increasing number of less-sugar-focused options. Ginger, cucumber, lemongrass, and even tobacco show up in vodkas, and rums continue to run toward spiced varieties, while cinnamon shows up in numerous spirits and mixed drinks. Mango emerges as a hot cocktail flavor, while honey and maple expand in whiskey drinks.

The New-Product Parade Continues

- The steady stream of new spirits, wine, and beer products, including seasonal, limited-time and specialty items, prompts on-premise operators to move toward category-management initiatives to optimize product placement and capitalize on consumers’ interest in trying new products.

Truly Special Specialty Drinks Stand Out

- Barrel-aged and bottled cocktails expand in high-end libation lounges, while communal cocktails, punches, and tiki drinks bring something unique to the bar or table. Some on-premise operators move toward a “less is more” mentality, menuing not only low-calorie but also lower-alcohol drinks.

Ultra-Targeted Marketing Grows

- Adult beverage suppliers and retailers in both the on- and off-premise segments seek to engage specific consumer groups. Look for spirits, wine and beer products as well as on-premise and retail concepts that are designed to appeal to particular demographic groups. On the hot list: Millennials, Hispanics, and women, as well as groups defined by active lifestyles or other attributes.

6.12 The Food Channel

The Food Channel (www.foodchannel.com) in conjunction with CultureWaves® and the International Food Futurists® compiles an annual list of the top 10 food trends foreseen for the coming year. The Top Ten Food Trends for 2014 are as follows:

Bread Rises to the Top

- We've talked a lot about artisanal breads in the past, even calling out the now-mainstream trend toward pretzel bread. If you need an example, fast food chain Wendy's is launching a new limited time offer with brioche (replacing their more recent LTO, pretzel bread). Our culinary teams are looking carefully at what's next, but breads continue to be big, even in a gluten-free world. As we look at the overarching trend, it's about the flavor experience of bread and how it's moving more to the center of the plate. Expect breads in more flavors, more forms, and dipped in more than just egg batter in the future. Some of this is led by a return to home baked bread, but it goes beyond that to bread with benefits (flax seed, anyone?), salted bread, flavored breads, and bread as the main course. Instead of being a carrier, bread is now surrounding itself with a variety of proteins and flavors. Bread salad, breaded meatballs and meatloaf, bread pudding, muffin cups, flatbread pizzas, stuffing casseroles – all of these are making us rethink how bread impacts a meal.

Craft Everything

- Blame Pinterest if you want, but the truth is, Americans are celebrating their creativity. Sure, you can make the case that when everyone is creative, no one really is ... but when it comes to food, the new concoctions are giving us variety and excitement in our food and beverages. Our 2012 call out of Craft Chocolates and our 2011 identification of Craft Beer turns out to have been right on the mark. We're throwing it back into the mix because there is an interesting evolution happening at the packaging level, which is going to move "craft" beyond small batch production into something bigger. Expect to see the return of beer in cans, for example. While the traditional thinking has been that you can't "do craft" in anything but bottles, it benefits the brewer's bottom line and so far no one is crying out about taste differences. More interesting packaging is on the horizon, along with more in the way of beer pairings. According to our evidence, people really don't yet understand the difference between microbrew, craft beer, and contract brew. And if the buyers don't care, how do you really preserve the "craft" aspect? We've seen die-hard craft beer fans call out contracted breweries as fake, and we've seen other beer fans not really care as long as they can continue to experiment long enough to find a favorite. Other crafts may experience a similar growing up period, as prices are driven down by the push to take craft to the masses. The question is, will craft be protected? After all, when fast food places start selling wine and beer with their food items, you know an explosion isn't far behind.

Distracted Dining

- You do it at home, especially when you eat on the run. Now restaurants are beginning to put their menu items into forms that accommodate the cell phone obsessed – so you can eat with one hand while the other holds the phone. Sandwiches, wraps, small bites are all sticking to the menu and growing because they don't require two-fisted dining. These restaurants have given up the fight to have people concentrate on their food (or on their companion) and are bowing to the pressure to make it more convenient to eat and not run. Of course, we see the other side, too, where restaurants are creating "no cell phone" zones. But to accommodate the masses, we predict you'll see more catering to the multi-tasking.

Ethnic Inspired

- The big one we're watching is Indian cuisine – but this is not meant to designate ethnic Indian food as much as it is a call out of the flavors. Think curry, coconut, ginger, garlic, and more. If nothing else, the viral Google video has people searching for Jhajhariya, a dessert made with corn, milk, sugar, and a form of clarified butter called "ghee." We are seeing the flavor profiles of India coming out more and more, which perhaps is part of the globalization of food. It's not really a homogenized melting pot, although these foods are finding some Americanized forms. But when Wingstop opens a store in the United Arab Emirates, and Doritos allows international submissions for its American big game promotions, you know for a fact that the world now thinks globally. We expect to see more global flavors, forms, and more and more "melting pot" foods, but foods that retain the authentic flavors and forms of a global society. Start with India, and see where it goes.

Hybridization of Food

- Americans have upped their vegetable intake, but Meatless Mondays are not even on the radar for a majority. Enter a new mashup – what we're calling the Hybridization of Food, where we are enhancing our protein with vegetables. Mushrooms in the meat, for example. FLIP Burger Boutique (Atlanta, GA) has gone so far as to call it "earth and turf." It may have started with sneaky moms and a blender, but it's a growing trend.

Investing in Food

- Even in the worst days of the Great Recession, you'd hear people say, "invest in food – we all still eat three times a day." The financial community has begun to take notice, with restaurant investments becoming hot property and restaurant stocks soaring. The overarching trend here goes beyond investing and is more about the way the food world has begun building trust. In previous years we've called out Food Insecurity issues and Local Somewhere, which are all ways to build trust with the world. Those in the food business take it seriously. After all, one attack of food poisoning can hurt a restaurant's image irretrievably. The fact that stocks such as Potbelly and Darden are trusted means that investors have decided the food world knows what it is doing. We're beginning to trust what they serve – even when the

discussion begins to revolve around extending food expiration dates and addressing world hunger in new ways. We get behind their causes, we support their staff, we even use our own social media to help build their brand equity. Look at it this way: for a number of years, entertainment has driven celebrity chefdom, which eventually leads to those chefs opening restaurants. The tide has turned and great restaurateurs are finding ways to entertain, without having to give up their restaurant in the process – they are more believable because they continue to invest in the passion that made them popular in the first place. We’ve found “brand sanctuary” and are placing our trust in something we understand. After all, we still eat three times a day.

Low Tea

- Bet you thought it was “high tea,” didn’t you? The reality is that the designation was more based on table size than anything! High tea was served at the dinner table, usually to the middle and lower classes, and was more substantial since it held them over while they served dinner to “the family” and may have replaced lunch (and maybe dinner, too) for them all together. The upper classes had a “low tea” that was more likely to be served in the drawing room or parlor, on a low table. It was meant to sustain them prior to evening activities. The influence of *Downton Abbey* (which returned in January 2014) may reign here, but it’s just one of the reasons we’ve called out the celebration of tea. It’s also attributable to European roots and the desire to emulate great experiences at white table restaurants and bring them down-to-earth. Grandmothers everywhere love creating tea parties for their grandchildren and are pulling out all the stops to create delicacies and milk-laced tea for their grandchildren. Those who have found more frequent small meals suit them better than three heavy meals a day have added afternoon tea for a quick pick up meal. Some might even consider it a follow up to brunch, since teatime recipes are often downsized brunch concepts. Let’s just say we’ve developed a taste for tea. Low tea is a light meal or snack, usually served around 4 p.m., and often shared with guests. We see a return to this “extra” meal and some interesting recipes to help people enjoy it.

Personal Shopping

- Whether it’s app-enabled or not, we’re seeing an increase in having someone else do your shopping for you. Local grocery stores offer apps to help you select your items, then they pull them off the shelves, bag them up, and deliver them to your door. Want mail delivery? Just shop online and have even fresh food delivered overnight. Personal shopping is no longer just a convenience or novelty option for the wealthy – having someone shop for your groceries, with home delivery, is becoming a necessity for some. As the population ages, we’re seeing more people who require assistance, meaning stores will begin to accommodate it on a more universal level. People want delivery of more than pizza – they want meals, they want groceries, and they feel entitled to customization, just like they see in urban cities. And, they are willing to pay the price.

Small Scale Molecular Gastronomy

- It had to happen eventually. We've been fascinated for years by chefs such as Grant Achatz of Alinea playing around with the chemical composition of food, and now we're doing it ourselves: pickling and brining. You might even say it's a little bit of "what goes around comes around," because this sort of chemical play is what our great-grandmothers did simply to preserve food longer. With both brining and pickling you get chemical changes in the food, which can bring about new flavors. While turkey brining has picked up interest over the last few years, we are now into pickling, too. And it's not just cucumbers – it's pickled fruit, pickled onions, shrimp, and the full range of pickled vegetables. If you are a Kimchee fan, you are the target for this trend. But even if you don't go quite that far, we expect you'll find pickled and brined items on more and more restaurant menus. Glazing has picked up steam, too – just another example of our desire to change up our food and give it a different flavor, texture, or even color. The trend in customization is going a step further, so that we are not only customizing, but manipulating our flavors.

The Midwestern Food Movement

- This is all about farm fresh and local taken to the next level, using the types of food readily available in the Midwest. After all, the East Coast is known for Italian; the West Coast for seafood – perhaps its time the Midwest became more than a flyover state. In fact, chefs such as Gerard Craft at Niche (St. Louis, MO) are beginning to focus on the ingredients available in the Midwest and doing interesting things with root vegetables, steaks, and more. We expect to see more Midwestern style cooking in this true food movement, as more chefs discover and put their own twists on some traditional foods that Midwesterners have kept secret for all these years.

6.13 Market Resources

Andrew Freeman & Co., 1212 Market Street, Suite 330, San Francisco, CA 94102.
(415) 781-5700. (www.afandco.com)

Baum + Whiteman, 912 President Street, Brooklyn, NY 11215. (781) 622-0200.
(www.baumwhiteman.com)

Bon Appétit, 4 Times Square, 5th Floor, New York, NY 10036. (212) 286-3535.
(www.bonappetit.com)

Culinary Visions, 445 West Erie Street, Suite 107, Chicago, IL 60654. (312) 280-4757.
(www.culinaryvisions.org)

Mintel, 333 West Wacker Drive, Suite 1100, Chicago, IL 60606. (312) 932-0400.
(www.mintel.com)

Sterling-Rice Group, 1801 13th Street, Suite 400, Boulder, CO 80302. (303) 381-6400.
(www.srg.com)

SupermarketGuru.com, 3015 Main Street, Suite 320, Santa Monica, CA 90405.
(310) 392-0448. (www.supermarketguru.com)

Technomic, Inc., 300 South Riverside Plaza, Suite 1200 South, Chicago, IL 60606.
(312) 876-0004. (www.technomic.com)

The Food Channel, 33 West Monroe Street, 2nd Floor, Chicago, IL 60603.
(417) 875-5302.

PART III: CONSUMER SURVEYS

DINING OUT

7.1 Overview

An April 2013 survey by Harris Interactive (www.harrisinteractive.com) found that 90% of U.S. adults had dined out in the past month for lunch or dinner. By demographic, those who had done so are as follows:

Gender

- Men: 90%
- Women: 90%

Age

- 18-to-35: 92%
- 36-to-47: 91%
- 48-to-66: 88%
- 67 and older: 89%

Family

- Children in household: 92%
- No children in household: 89%

Community

- Urban: 88%
- Suburban: 90%
- Rural: 90%

This chapter presents a summary of the Harris Poll on dining out.

7.2 Dining By Restaurant Type

When asked the types of restaurants they had visited in the prior month, responses were as follows:

- Quick-service restaurant chain (QSR): 64%
- Local casual-dining restaurant: 54%
- Casual-dining restaurant chain: 52%
- Local fine-dining restaurant: 18%
- Fine-dining restaurant chain: 9%

By demographic, dining-out experiences were as follows:

		Local	Casual	Local	Fine Dining
Gender	QSR	Casual	Chain	Fine Dining	Chain
• Men:	66%	53%	50%	19%	8%
• Women:	62%	55%	54%	17%	9%
Age					
• 18-to-35:	71%	52%	57%	21%	14%
• 36-to-47:	68%	51%	52%	20%	9%
• 48-to-66:	61%	55%	51%	14%	5%
• 67 and older:	51%	61%	45%	19%	7%
Family					
• Children in HH:	73%	50%	56%	16%	13%
• No children in HH:	61%	55%	51%	18%	7%
Community					
• Urban:	64%	50%	47%	23%	11%
• Suburban:	63%	56%	57%	19%	9%
• Rural:	67%	54%	47%	10%	5%

By restaurant type, survey participants said changes in dining out during the prior 30 days were as follows:

	More Frequently	Same	Less Frequently	Not At All
• Quick-service restaurant chain (QSR):	14%	47%	26%	13%
• Local casual-dining restaurant:	14%	50%	20%	16%
• Casual-dining restaurant chain:	11%	48%	24%	17%
• Local fine-dining restaurant:	7%	31%	21%	42%
• Fine-dining restaurant chain:	4%	26%	23%	47%

7.3 Factors In Choosing A Restaurant

When asked the factors that drive them to choose a restaurant when they go out to eat, survey participants identified the following as important:

• A restaurant which has good prices:	90%
• It depends on the mood I am in for either a type of food or type of cuisine:	86%
• The restaurant offers a specific menu item that I enjoy:	84%
• A convenient restaurant location for me:	83%
• A restaurant menu which has a broad variety of menu items to choose from:	78%
• A restaurant that usually has special offers:	59%
• They have healthy menu items that fit my dietary needs:	54%

- I usually choose the same restaurant when I go out for meal: 44%
- A restaurant menu which usually has new items to choose from: 43%

7.4 Cuisine

Survey participants identified their favorite cuisine as follows:

- American: 31%
- Italian: 23%
- Mexican: 16%
- Chinese: 14%
- Japanese: 5%
- Middle-Eastern: 3%
- Indian: 2%
- French: 1%
- Other: 5%

By gender, favorite cuisine is as follows:

- | | Men | Women |
|-------------------|------------|--------------|
| • American: | 35% | 26% |
| • Italian: | 22% | 24% |
| • Mexican: | 15% | 16% |
| • Chinese: | 14% | 15% |
| • Japanese: | 4% | 6% |
| • Middle-Eastern: | 3% | 3% |
| • Indian: | 2% | 3% |
| • French: | 2% | 1% |
| • Other: | 4% | 6% |

By region, favorite cuisine is as follows:

- | | East | Midwest | South | West |
|-------------------|-------------|----------------|--------------|-------------|
| • American: | 34% | 34% | 32% | 22% |
| • Italian: | 31% | 21% | 21% | 21% |
| • Mexican: | 7% | 13% | 18% | 24% |
| • Chinese: | 13% | 17% | 13% | 15% |
| • Japanese: | 4% | 4% | 5% | 5% |
| • Middle-Eastern: | 2% | 1% | 4% | 4% |
| • Indian: | 1% | 4% | 1% | 3% |
| • French: | 1% | 2% | 1% | 2% |
| • Other: | 7% | 3% | 5% | 5% |

7.5 Market Resources

Harris Interactive, 60 Corporate Woods, Rochester, NY 14623. (585) 272-8400.
(www.harrisinteractive.com)

CONSUMER CHOICES WHEN DINING OUT

8.1 Overview

In 2013, The NPD Group (www.npd.com) conducted four surveys that assessed choices that consumers make when dining out. Findings are presented in this chapter.

8.2 Healthy Eating

According to *Healthy at Foodservice - Consumer Expectations Put In Perspective*, published in June 2013, while over 50% of adults say they eat healthful meals always or most of the time at home, only 25% say they eat healthy foods when they go out to eat. Among consumers not ordering healthy when they dine out, 37% said when they go out to eat, “I want to eat what I want to eat,” and 23% said “I want to indulge when I go out to eat.”

“The bottom line is that even with an increasing number of restaurants offering healthier menu items or posting calories and other nutritional information, at the end of the day, consumers see dining out as a treat, an indulgence. Restaurant operators are in a challenging position trying to balance meeting their customers’ wants and needs, like any successful marketer should do, and meeting societal responsibilities.”

Bonnie Riggs, Restaurant Analyst
The NPD Group, 6/11/13

When selecting healthier options from a restaurant, consumers choose as follows (percentage of respondents):

• Have a salad as a meal:	39
• No dessert or sweets:	38
• No beverage or water only:	37
• Pick a healthier protein or meat:	28
• Select a smaller portion:	23
• No appetizer:	22
• Don't eat the entire meal:	19
• Have items prepared in a healthier way:	17
• No dressing, sauce, gravy; or have on the side:	16
• Have a light or diet version:	15
• Get items that fit diet:	13
• Share an entree:	12
• Have soup as a meal:	11
• Have an appetizer instead of an entree:	10
• No side items:	10

8.3 Key Factors In Assessing Value

According to *Defining Value: Where Consumers Choose to Eat Out*, published in June 2013, value ranks highest when selecting a restaurant, as follows:

- Quality for the price
- Fresh ingredients
- Choice

When assessing the value of combo meals, almost two-thirds of consumers say that "I'd rather choose items in combo meals than pre-determined combo meals." While offering choices in combo meals is important across all key restaurant channels, consumers visiting fast-casual, midscale/family-dining, and casual-dining restaurants are the most likely to seek choice.

According to the report, foodies and restaurant regulars, which together represent 58% of the market, care less about price and deals and more about the quality and freshness of their meal. Fresh ingredients and freshly prepared food are also strong motivators among fast-casual visitors.

“Quality remains the most important value driver when choosing restaurants and should be viewed as a cost of entry. Operators must go further, however, and deliver on customization and fresh ingredients as these are other important factors in the value equation.”

Bonnie Riggs, Restaurant Analyst
The NPD Group, 6/24/13

8.4 Restaurant Loyalty

According to *Defining Value: Where Consumers Choose to Eat Out*, when deciding between promotions and loyalty to a favorite restaurant, consumers choose as follows:

- Go to the same place regardless of promotions: 42%
- Switch around based on promotions: 26%
- Go where it is the cheapest: 19%
- Seldom eat out: 9%
- Other: 4%

“More than forty percent of consumers say they are loyal to their favorite restaurants and will go there whether or not the establishment has a promotion. And although there are still over one-third of consumers looking for bargains when choosing a restaurant, this large group of loyal restaurant consumers defines value as more than price.”

Bonnie Riggs, Restaurant Analyst
The NPD Group, 5/1/13

8.5 Trying New Menu Items

Menu Item Trial: Motivating First-Time and Repeat Orders assessed that 70% of consumers are reluctant to try a new menu item. Seventeen percent (17%) are early adopters and are willing to order a brand new menu item; 10% will try a limited-time offer item.

According to the NPD study, consumers try a new or unfamiliar menu item based on their perceptions of its taste and visual appeal. They also consider healthfulness and price when making the decision to try a new item. Customers with a particular menu item in mind will generally try a new item only if it is similar to what they were already considering. The exception to this is snacks, where customers more freely try new items.

Trying a new menu item occurs less frequently at quick-service places than at full-service restaurants. At casual-dining restaurants, the choice of a new menu item depends upon the quality/freshness of the ingredients used, the item being a good meal accompaniment choice, and if the item being shareable with others. Half of new menu items ordered are main dishes, sandwiches make up another half.

“Insight into the reasons why consumers try a food or beverage menu item that they have not purchased before provides restaurant operators with the knowledge required for successful product innovation, introduction, and marketing. In addition, stimulating menu-item trial and delivering a satisfying experience should lead to repeat visits and sustained customer loyalty.”

Bonnie Riggs, Restaurant Analyst
The NPD Group, 1/14/14

8.6 Market Resources

The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700.
(www.npd.com)

CONSUMER RESPONSE TO DINING EXPERIENCES

9.1 Overview

In 2013, Technomic (www.technomic.com) conducted five surveys that assessed customer satisfaction with restaurant dining. The surveys were part of Technomic's Consumer Brand Metrics and Consumer Trends initiatives. Findings are presented in this chapter.

9.2 Ambiance

Consumer Assessments of Decor, Music and Atmosphere at Leading Restaurant Chains provided the following assessment of consumer response to ambiance:

- Ninety-one percent (91%) of casual-dining restaurant patrons say that an appealing ambiance influences their decision to visit a particular concept. For quick-service restaurants, 84% of customers say it is important that the units they visit have a welcoming and comfortable atmosphere.
- Younger consumers put a greater emphasis on music and decor. Across all restaurant segments, Generation X and Generation Z most strongly prioritizes music and decor. Fifty-two percent (52%) of those in the younger generations say that a concept's music selection is an important factor in their decision to visit a casual-dining restaurant; only 43% of older consumers consider this important.
- Ninety-eight percent (98%) of consumers who rated a restaurant's atmosphere and ambiance as very good also rated their overall visit favorably (excellent or good). In comparison, less than half of those who rated the ambiance as bad (43%) or very bad (31%) gave their overall visit a favorable rating.

“It’s essential for operators, particularly in the full-service segment, to consider how atmosphere can play a role in the way consumers rate their overall dining experience.”

Darren Tristano, Exec. V.P.
Technomic, 2/27/14

Technomic ranked chain restaurants based on customers' evaluation of four attributes: overall atmosphere and ambiance; a welcoming, comfortable atmosphere; music selection; decor. The following chains had the highest customer satisfaction ratings:

Full Service

- Bahama Breeze Island Grille
- Seasons 52
- The Capital Grille
- Maggiano's Little Italy
- Romano's Macaroni Grill

Limited Service

- Caribou Coffee
- McAlister's Deli
- Firehouse Subs
- Pinkberry
- Potbelly Sandwich Shop

9.3 Beverage Consumption

Adult Beverage Consumption at the Leading Restaurant Chains, published in November 2013, assessed how adult beverage programs enhance guest satisfaction. Findings are as follows:

- Sixty-one percent (61%) of consumers who ordered an adult beverage gave their visit an "excellent" rating, compared to 55% of those who did not order an adult beverage.
- Forty-two percent (42%) of adult-beverage consumers said that they will return to that restaurant in the near future; 42% say they will recommend the concept to friends and family. Among all restaurant guests, these percentages are 39% and 37%, respectively.
- Forty-three percent (43%) of those who consumed an adult beverage while standing and waiting for a table said that the restaurant they visited was the right place for that specific occasion, more than those who consumed their beverages elsewhere.
- While more consumers participating in the survey ordered beer rather than mixed drinks or wine on their last restaurant visit, consumers who ordered mixed drinks were most likely to say that they'll return to the restaurant (45%) and recommend it to others (44%).

9.4 Craveability

Cultivating Craveability: Consumer Assessments of the Most Craveable Restaurant Chains, published in July 2013, assessed the importance of craveable menu items. Findings are as follows:

- Eighty-three percent (83%) of consumers say that cravings are a main reason they purchase food away from home.
- Seventy-five percent (75%) of customers who say that the chain they visited does a very good job at menuing craveable items rated their last visit to this chain as excellent; 21% rated it as very good or good.
- Ninety-five percent (95%) of customers who rate a restaurant chain's craveable items as very good say that they will return to the restaurant in the near future; 66% of those who gave the chain lower ratings on craveability say they will do so.

“Craveable menu items are a critical element of the menu mix. Craveable items promote impulse-driven occasions, can build a strong emotional connection with consumers and, in many cases, are the items that restaurants become known for. To cultivate craveability, operators must develop and refine unique signature items that have the power to transform guests into regulars. Some of these items might include comfort foods, memorable sides, and sweet snacks.”

Darren Tristano, Exec. V.P.
Technomic, 7/9/13

9.5 Flavors

Flavor Consumer Trend Report, published in November 2013, assessed restaurant customers' response to flavors. Findings are as follows:

- Seventy-three percent (73%) say that if they try and like a menu item with an innovative flavor, they would be highly likely to return to the restaurant for the same menu item.
- Fifty-four percent (54%) of adults prefer hot or spicy sauces, dips, or condiments. Two years earlier, in 2011, 48% said they had this preference; in 2009, 46% said so.
- Thirty-seven percent (37%) of adults say they are increasingly driven to try new flavors; 41% say that new flavors can influence them to visit a restaurant.

9.6 Value

Value & Pricing Consumer Trend Report, published in August 2013, reported that 88% of consumers rate value as highly important when deciding which restaurant to visit.

When asked which attributes of food and beverage are most important in their overall value equation at restaurants, responses were as follows:

- Quality: 80%
- Taste of food: 66%
- Freshness: 49%
- Portion size: 37%
- Variety: 13%
- Healthfulness: 6%

The following are other findings of the study:

- “Fresh” and “premium” descriptors can increase consumers’ perception of value. Forty-eight percent (48%) say they would be likely to purchase and pay more for food and beverages that are fresh, and 37% say the same for premium food and drink.
- Forty-five percent (45%) of consumers place a high importance on staggered portion sizes at different prices; 44% say that large portion sizes create strong value at restaurants.
- Deal-seeking behavior has become ingrained in consumers. Fifty-four percent (54%) say they are seeking restaurant deals and promotions more often now than they were in 2011.
- Fifty-one percent (51%) of consumers polled said that the ability to customize ingredients for their meal is “important” or “extremely important” in creating good value.

9.7 Market Resources

Technomic, Inc., 300 South Riverside Plaza, Suite 1200, Chicago, IL 60606.
(312) 876-0004. (www.technomic.com)

CONSUMER PREFERENCES

10.1 Overview

Surveys by Service Management Group (SMG, www.smg.com) assess consumers' preferences related to various aspects of dining out. The surveys query customers based on their most recent restaurant visit and compare various factors that relate to their satisfaction with that experience.

10.2 Factors Contributing To High Customer Satisfaction

The following are findings based on SMG surveys:

Age Demographic

By age, the percentages of customers highly satisfied with their most recent dining experience are as follows:

	Under 18	18-to-24	25-to-34	35-to-49	50 and Older
• Fine-dining:	n/a	76%	70%	72%	78%
• Casual-dining:	78%	77%	70%	71%	77%
• Fast-casual:	76%	71%	65%	67%	74%
• Fast-food:	63%	65%	58%	58%	67%

“Customers over 50 years old are more satisfied than the average customer across all restaurant segments. Meanwhile, guests between the ages of 25 and 49 are the least satisfied.”

Service Management Group

Alcoholic Beverage Consumption While Dining

Customer satisfaction between patrons who consume alcoholic beverages and those who do not compares as follows:

	Satisfied Overall	Likely To Recommend
• Ordered alcoholic beverage:	74%	75%
• Did not order alcohol:	70%	71%

“When diners order drinks they perceive heightened levels of service and tend to spend more.”

Service Management Group

Corporate Headquarters Markets

SMG research found chain restaurants don't have an advantage with locations in the same city as corporate headquarters. Customers rated their satisfaction at restaurant chain locations as follows:

	Overall Satisfaction	Likely To Return
• Corporate headquarters market:	71%	73%
• All other markets:	71%	73%

“Diners in other markets are just as satisfied and likely to return as diners in the corporate headquarters market. Delivering on customer service is still the key to having satisfied customers.”

Service Management Group

Corporate-Owned vs. Franchise-Owned Locations

Customers rated satisfaction with their most recent experience at corporate-owned and franchise-owned chain restaurant as follows:

	Overall Satisfaction	Temperature of Food	Cleanliness
• Corporate-owned locations:	66%	67%	61%
• Franchise-owned locations:	68%	70%	63%

“Customers visiting franchised quick-service restaurants are slightly more satisfied than customers visiting corporate-owned locations. It seems as though franchisees are better at delivering on metrics that make a difference to customers.”

Service Management Group

Day-Of-Week

By the day of the week, the percentages of customers highly satisfied with their dining experiences are as follows:

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
• Full menu:	67%	68%	70%	70%	68%	68%	67%
• Pizza:	63%	68%	67%	67%	66%	67%	67%
• Fast-casual:	63%	67%	66%	67%	66%	66%	64%
• Fast-food:	61%	63%	63%	64%	63%	63%	61%

“On weekends, higher volumes and higher expectations for ‘destination’ trips can raise the bar for service excellence, resulting in less satisfied customers.”

Service Management Group

Dining Room vs. Bar Area Dining

Restaurant patrons compare their table service as follows:

	Satisfied Overall	Taste of Food	Pace of Meal
• Dining room:	70%	72%	64%
• Bar area:	75%	72%	70%

“Guests in the bar area are more satisfied overall than those in the dining room. While diners are equally happy with the food regardless of seating choice, those in the dining room are less satisfied with the pace of their meals than bar patrons.”

Service Management Group

Dining With Children

Customers dining with children rate their dining experience as follows:

	Highly Satisfied	Likely To Return
• Diners with children under age 12:	62%	68%
• Diners without children under age 12:	63%	64%

“Across all loyalty measures, restaurant customers who visit with children are less satisfied than those who visit without children.”

Service Management Group

Drive-Thru Dine-In

By type of service, the following percentages of customers rated their most recent restaurant experience as highly satisfactory:

- Dine-In: 69%
- Drive-Thru: 65%

“Many fast-food patrons choose to use drive-thrus for convenience and accessibility, but they don’t receive the same quality of dining experience as those who dine in.”

Service Management Group

First-Time vs. Returning Customers

The percentages of first-time and returning customers highly satisfied with their dining experience and those likely to return are as follows:

	Highly Satisfied	Likely To Return
• First-time customers:	67%	57%
• Returning customers:	70%	73%

Gift Card Use

Customer satisfaction among restaurant customers using and not using a gift card is as follows:

	Experienced A Problem	Likely To Return
• Gift card user:	24%	28%
• No use of gift card:	12%	40%

“Gift card users are twice as likely to experience a problem during their visits, often related to gift card use.”

Service Management Group

Guest Experience and Tipping

Not surprisingly, as the guest experience increases, so does the tip. The following are average tip percentages based on customers’ dining experience:

- Highly satisfied: 19.7%
- Neutral: 17.3%
- Highly dissatisfied: 16.2%

Healthful Fare By Daypart

Across the following three segments, the same percentage of diners resolved to eat healthier in 2014:

- Casual-dining: 18%
- Fast-Casual: 18%
- Fast-Food: 18%

“The desire to eat more healthfully in 2014 is the same across all restaurant segments.”

Service Management Group

Loyalty Club Membership

Diners who are members of a restaurant’s loyalty club are least likely to give the restaurant a second chance after experiencing a problem during service. Compared with non-loyalty club members, the percentage of patrons who would not return to a restaurant after an issue is as follows:

- Loyalty Club Members: 12%
- Non-loyalty Club Members: 23%

Loyalty Patrons’ Preferences

Among loyal restaurant patrons who are likely to return to an establishment, by segment, positive mentions are made based on the following criteria:

	Fast-Casual	Quick-Service	Casual-Dining
• Friendliness:	88%	87%	87%
• Taste:	86%	83%	87%
• Speed:	73%	75%	61%
• Accuracy:	59%	60%	53%

“Loyalty customers talk positively about all aspects of the dining experience, but friendliness is the clear winner, showing that a smile and a positive attitude are key.”

Service Management Group

Manager Presence

Customer satisfaction with and without a manager on duty is as follows:

	Overall Satisfaction	Likely To Return
• Manager visible:	84%	81%
• Manager not visible:	65%	55%

“When a manager interacts with or serves customers, guests indicate they have a better overall experience.”

Service Management Group

Morning Meals

By daypart, the percentage of visits to QSRs that were return trips to a single brand were as follows:

- Breakfast: 69%
- Lunch: 49%
- Dinner: 50%

“Customers at the top 50 QSRs based on domestic unit count concentrated 69% of their breakfast visits with one brand, versus roughly half of lunch and dinner visits that were repeat trips to a single brand.”

Service Management Group

Newer vs. Older Restaurants

Based on the age of the restaurant, the following percentages of customers said they likely would recommend a restaurant:

- Restaurant under five years old: 69%
- Restaurant 5-to-10 years old: 67%
- Restaurant more than 10 years old: 65%

“Guests visiting restaurants that have been operating for fewer than five years are slightly more likely to recommend the restaurant to friends. This helps make the case that investing in store updates can help drive customer loyalty.”

Service Management Group

Ordering Takeout

Customer satisfaction for takeout from a restaurant when ordering in person, by phone, and via fax or online is as follows:

	Overall Satisfaction	Experienced A Problem
• In person:	71%	12%
• Telephone:	69%	15%
• Online or fax:	61%	22%

“Diners who order takeout in person at the restaurant are the most satisfied of all to-go orderers and experience fewer problems overall.”

Service Management Group

Party Size

By party size, the following percentages of customers rated their most recent restaurant experience as highly satisfactory:

- Single person: 68%
- Party of two: 67%
- Three or four: 64%
- Five or more: 62%

“Diners in groups of three or more report lower overall satisfaction than smaller parties. This is likely related to timing, and operators can combat this tendency toward lower satisfaction by focusing on speed of service for larger parties.”

Service Management Group

Problem Resolution

Following resolution of a dining-related problem, these percentages of diners rated their overall dining experience as highly satisfactory:

- Fine-dining: 37%
- Casual-dining: 36%
- Fast-casual: 32%
- Fast-food: 30%

“Fine- and casual-dining operators resolve problems better than their fast-casual and fast-food counterparts because they have more interaction with guests.”

Service Management Group

Problem With Promotional Item

The following percentage of restaurant patrons had problems with promotional items they ordered:

- Speed/Pacing: 27%
- Price: 16%
- Taste: 11%
- Accuracy: 6%

Reasons For Return Visits

When asked why they returned to the restaurant of their most recent visit, customers responded as follows:

- Previous positive experience: 79%
- Recommendation from friend or family, advertisement, type of cuisine, variety of menu selections: 64%
- Convenient location: 58%

“A superior previous experience trumps convenience and other reasons for visit. Give them great food and great service and watch them come back.”

Service Management Group

Restaurant Choice

Customers say they chose the restaurant they most recently visited for the following reason:

- Previous positive experience: 79%
- Convenient location: 58%
- Other reason: 64%

“Nothing guarantees a return visit like a great dining experience.”

Service Management Group

Rural vs. Urban Locations

Based on market population, the following percentages of customers said they likely would recommend a restaurant based on their most recent dining experience:

- Population more than 50,000: 61%
- Population 10,000-to-50,000: 64%
- Population less than 10,000: 67%

“Fast-food diners in rural areas are more satisfied than fast-food diners in urban areas. Rural diners gave higher scores for friendliness, speed of service, and taste of food and were more satisfied overall.”

Service Management Group

Special Occasions

Satisfaction of restaurant guests celebrating a special occasion compared with normal dining visits is as follows:

- | | Satisfied Overall | Likely To Return |
|---------------------|-------------------|------------------|
| • Special occasion: | 75% | 72% |
| • Normal dining: | 76% | 79% |

“Guests celebrating a special occasion at fine-dining restaurants are slightly less satisfied than other fine-dining guests and far less likely to return in the future. Expectations are likely high for celebrating guests, so service must be extra special to impress these diners.”

Service Management Group

Steakhouse Customer Satisfaction

Steak preparation at steakhouse restaurants is reflected in customer satisfaction as follows:

	Overall Satisfaction	Likely To Return	Reported A Problem
• Steak prepared correctly:	74%	74%	6%
• Steak prepared incorrectly:	43%	50%	26%

“At steakhouses, correct preparation is everything.”

Service Management Group

Sub Shop Customer Satisfaction

Customer satisfaction at sub shops compared with other quick-service restaurants is as follows:

	Taste of Food	Likely To Return
• Sub shop:	73%	67%
• QSR:	67%	57%

“Sub shops enjoy more customer loyalty than other QSRs.”

Service Management Group

Suggestive Selling

The influence of menu suggestions by waitstaff on customer satisfaction is as follows:

	Satisfied Overall	Likely To Recommend
• With suggestive selling:	80%	76%
• Without suggestive selling:	58%	54%

“Upselling makes customers feel they’re getting special service, boosts ticket prices, and strengthens the likelihood that guests will recommend a restaurant.”

Service Management Group

Type Of Service

By restaurant segment, the percentage of customers experiencing a problem is as follows:

• Fine-dining:	10.0%
• Fast-casual:	9.1%
• Casual-dining:	8.7%
• Quick-service:	7.7%

“The expectations of fine-dining customers are much higher, and raised expectations mean customers are more likely to perceive problems with their experience.”

Service Management Group

10.3 Market Resources

Service Management Group, 1737 McGee Street, Kansas City, MO 64108.
(800) 764-0439. (www.smg.com)

CONSUMER PICKS

11.1 Overview

Since 2011, WD Partners (www.wdpartners.com) has annually polled consumers across the U.S. about their attitudes toward restaurant chain brands. Survey participants rate 10 attributes for chains they patronized in the previous six months, as follows:

- Atmosphere
- Cleanliness
- Craveability
- Food quality
- Likelihood to recommend
- Likelihood to return
- Menu variety
- Reputation
- Service
- Value

Overall scores for each brand are a weighted average of the 10 attribute scores.

The results of the survey, based on ratings of 171 restaurant chain brands, were published by *Nation's Restaurant News* in March 2013 and presented online at <http://nrn.com/industry-data/consumer-picks>. The top ranked brands are summarized in this chapter.

11.2 Favorites By Segment

The top restaurant brands by segment are as follows:

Casual-Dining

1. The Cheesecake Factory
2. Bonefish Grill
3. P.F. Chang's China Bistro
4. The Melting Pot
5. Carrabba's Italian Grill

Family-Dining

1. Cracker Barrel Old Country Store
2. Bob Evans Restaurants
3. The Original Pancake House
4. Big Boy
5. IHOP

Fine-Dining

1. Ruth's Chris Steak House
2. Morton's The Steakhouse
3. McCormick & Schmick's

Limited-Service

1. In-N-Out Burger
2. Cold Stone Creamery
3. Papa Murphy's Take 'N' Bake
4. Marble Slab Creamery
5. Ben & Jerry's

11.3 Market Resources

WD Partners, 7007 Discovery Boulevard, Dublin, OH 43017. (614) 634-7000.
(www.wdpartners.com)

12

CUSTOMER SATISFACTION

12.1 Overview

The American Customer Satisfaction Index (ACSI, www.theacsi.org) is a national economic indicator of satisfaction with the quality of products and services available to U.S. household consumers. Established in 1994, the ACSI produces indices of customer satisfaction on a 0-100 scale.

The ACSI is based on about 65,000 interviews conducted annually, with 250 to 260 interviews completed per company/agency. Industry sample sizes vary from 750 to 10,000, depending on the number of measured companies in each industry.

The ACSI is produced by the Stephen M. Ross Business School at the University of Michigan (www.bus.umich.edu), in partnership with the American Society for Quality (www.asq.org) and the international consulting firm CFI Group (www.cfigroup.com). ForeSee Results (www.foreseeresults.com) sponsors the e-commerce and e-business measurements.

12.2 ACSI Scores

The ACSI scores for restaurant sectors have been as follows:

	Full-Service	Limited-Service
• 2007:	81	77
• 2008:	80	78
• 2009:	84	78
• 2010:	81	75
• 2011:	82	79
• 2012:	80	80
• 2013:	81	80

12.3 Customer Satisfaction Scores

ACSI scores from 2012 surveys and change from 2011 scores for restaurant chains are as follows:

Full-Service Restaurants

- Red Lobster: 83 (no change)
- Outback Steakhouse: 83 (3.8%)
- Applebee's: 82 (6.5%)

- Outback Steakhouse: 81 (no change)
- Chili's: 78 (2.6%)
- All others: 81 (no change)
- Sector average: 81 (1.3%)

Limited-Service Restaurants

- Subway: 83 (1.2%)
- Papa John's: 82 (-1.2%)
- Little Caesar: 82 (no change)
- Domino's Pizza: 81 (5.2%)
- KFC (YUM! Brands): 81 (8.0%)
- Starbucks: 80 (5.3%)
- Pizza Hut (YUM! Brands): 80 (2.6%)
- Dunkin' Donuts: 80 (1.3%)
- Wendy's: 79 (1.3%)
- Burger King: 76 (1.3%)
- Taco Bell (YUM! Brands): 74 (-3.9%)
- McDonald's: 73 (no change)
- All others: 82 (no change)
- Sector average: 80 (no change)

12.4 Market Resources

American Customer Satisfaction Index (ACSI), 625 Avis Drive, Ann Arbor, MI 48108. (734) 913-0788. (www.theacsi.org)

Foresee Results, 2500 Green Road, Suite 400, Ann Arbor, MI 48105. (800) 621-2850. (www.foreseeresults.com)

PART IV: CITY-BY-CITY ANALYSIS

DINING OUT

13.1 Metropolitan Areas

According to a July 2013 assessment by International Demographics (www.themediiaudit.com), the following are the metropolitan areas with the highest percentage of adults who dine at full-service restaurants, on average, two or more times per week:

• Fort Myers-Naples, FL:	19.4%
• West Palm Beach, FL:	19.2%
• Sarasota-Bradenton, FL:	18.5%
• Dallas-Ft. Worth, TX:	18.0%
• Lexington, KY:	18.0%
• Tampa, FL:	16.9%
• Greenville-Spartanburg, SC:	16.7%
• Nashville, TN:	16.4%
• Austin, TX:	16.2%
• Greensboro-Winston Salem, SC:	15.6%

The following metropolitan areas have the lowest percentage of adults dining at full-service restaurants two or more times per week:

• Rochester, NY:	5.0%
• Colorado Springs, CO:	5.9%
• Southern New Hampshire:	7.0%
• Harrisonburg, VA:	7.1%
• Buffalo, NY:	7.2%

Across 80 metropolitan areas, International Demographics found that 12.2% of adults dine out at full-service restaurants two or more times per week. This represents a population of more than 17 million people.

Data on full-service dining in 80 metropolitan areas is available online at www.themediiaudit.com/press/local-releases.

13.2 Market Resources

International Demographics, 10333 Richmond Avenue, Suite 200, Houston, TX 77042. (713) 626-0333. (www.themediiaudit.com)

QUICK-SERVICE RESTAURANT VISITS

14.1 Metropolitan Areas

According to International Demographics ([www.themediiaudit.com](http://www.themediiaaudit.com)), the following are the metropolitan areas with the highest average number of weekly quick-service restaurant purchases among residents of various metropolitan areas:

- Oklahoma City, OK: 4.11
- Decatur, IL: 3.42
- Ft. Myers-Naples, FL: 3.40
- Dallas-Ft. Worth, TX: 3.18
- Little Rock, AR: 3.15
- Northwest Arkansas: 3.08
- Savannah, GA: 3.08
- Tulsa, OK: 3.08
- Indianapolis, IN: 3.03
- Syracuse, NY: 3.03

The following metropolitan areas have the lowest average number of weekly quick-service restaurant purchases:

- Allentown-Bethlehem, PA: 1.94
- Charlottesville, VA: 1.97
- Southern New Hampshire: 1.98
- Buffalo, NY: 2.01
- Madison, WI: 2.06

Data on quick-service restaurant visits in 80 metropolitan areas is available online at www.themediiaaudit.com/press/local-releases.

14.2 Market Resources

International Demographics, 10333 Richmond Avenue, Suite 200, Houston, TX 77042. (713) 626-0333. (www.themediiaaudit.com)

LARGEST CHAINS IN METROPOLITAN AREAS

15.1 Largest Chains and Unit Counts

The following are the largest restaurant chains, ranked by number of units, in select metropolitan areas (source: *Chain Store Guide - Instant Demographics*):

Albuquerque, New Mexico

• Subway:	67
• McDonald's:	43
• Starbucks:	38
• Sonic:	23
• Taco Bell:	22
• Pizza Hut:	19
• Wendy's:	18
• Domino's Pizza:	16
• KFC:	15
• Burger King:	14

Anchorage, Alaska

• Subway:	37
• Starbucks:	23
• McDonald's:	18
• Pizza Hut:	10
• Quiznos:	9
• Taco Bell:	9
• Arby's:	8
• Burger King:	6
• Cold Stone Creamery:	6
• Dunkin' Donuts/Baskin-Robbins (co-branded):	5

Atlanta, Georgia

• Subway:	378
• McDonald's:	247
• Waffle House:	231
• Starbucks:	199
• Wendy's:	172

• Pizza Hut:	121
• Burger King:	114
• Chick-fil-A:	112
• Taco Bell:	106
• Blimpie:	95

Austin, Texas

• Subway:	109
• Starbucks:	92
• McDonald's:	67
• Sonic:	57
• Taco Bell:	45
• Jack in The Box:	39
• Quiznos:	36
• Pizza Hut:	34
• Wendy's:	32
• Whataburger:	29

Baltimore, Maryland

• Subway:	192
• McDonald's:	132
• Starbucks:	99
• Dunkin' Donuts/Baskin-Robbins (co-branded):	64
• Wendy's:	57
• Burger King:	55
• Quiznos:	53
• Pizza Hut:	48
• Domino's Pizza:	46
• KFC:	45

Billings, Montana

• Subway:	15
• McDonald's:	9
• Burger King:	6
• Arby's:	5
• Dairy Queen:	5
• Pizza Hut:	5
• Starbucks:	5
• Taco John's:	5
• Wendy's:	5
• Domino's Pizza:	4

Boston, Massachusetts

• Dunkin' Donuts/Baskin-Robbins (co-branded):	810
• McDonald's:	171
• Starbucks:	156
• Subway:	156
• Papa Gino's:	95
• D'Angelo Sandwiches:	79
• Domino's Pizza:	73
• Burger King:	72
• Wendy's:	60
• Honey Dew Donuts:	56

Charleston, South Carolina

• Subway:	58
• McDonald's:	31
• Burger King:	21
• Pizza Hut:	21
• Wendy's:	19
• KFC:	18
• Starbucks:	18
• Taco Bell:	18
• Dunkin' Donuts/Baskin-Robbins (co-branded):	17
• Hardee's:	16

Charlotte, North Carolina

• Subway:	139
• McDonald's:	75
• Starbucks:	65
• Bojangles:	59
• Wendy's:	50
• Pizza Hut:	47
• Burger King:	42
• Taco Bell:	37
• Chick-fil-A:	36
• Quiznos:	34

Chicago, Illinois

• Subway:	777
• Starbucks:	484
• McDonald's:	466
• Dunkin' Donuts:	310
• Burger King:	221

• Taco Bell:	173
• Jimmy John's:	161
• Wendy's:	158
• Dunkin' Donuts/Baskin-Robbins (co-branded):	147
• KFC:	142

Cleveland, Ohio

• Subway:	203
• McDonald's:	111
• Burger King:	72
• Starbucks:	56
• Pizza Hut:	51
• Wendy's:	51
• Arby's:	44
• Taco Bell:	44
• KFC:	42
• Dairy Queen:	41

Columbus, Ohio

• Subway:	160
• Wendy's:	99
• McDonald's:	95
• Starbucks:	91
• Donatos Pizza:	55
• Taco Bell:	53
• Bob Evans:	41
• Burger King:	41
• KFC:	41
• Arby's:	38

Concord, New Hampshire

• Dunkin' Donuts:	23
• Subway:	13
• McDonald's:	8
• Wendy's:	4
• Burger King:	3
• Applebee's:	2
• D'Angelo:	2
• Friendly's:	2
• KFC:	2
• Ninety Nine:	2

Denver, Colorado

• Starbucks:	254
• Subway:	173
• McDonald's:	122
• Taco Bell:	76
• Burger King:	68
• Wendy's:	63
• Quiznos:	60
• Pizza Hut:	51
• Chipotle Mexican Grill:	48
• Dairy Queen:	47

Des Moines, Iowa

• Subway:	41
• McDonald's:	29
• Starbucks:	22
• Burger King:	19
• Dairy Queen:	15
• Pizza Hut:	15
• Quiznos:	15
• Arby's:	13
• Taco John's:	13
• Godfather's Pizza:	12

Hartford, Connecticut

• Dunkin' Donuts:	174
• Subway:	114
• McDonald's:	56
• Starbucks:	28
• Burger King:	24
• Friendly's:	19
• Wendy's:	19
• KFC:	18
• Taco Bell:	16
• Domino's:	14

Honolulu, Hawaii

• Subway:	89
• Starbucks:	52
• McDonald's:	49
• L&L Hawaiian Barbecue:	33
• Jamba Juice:	25
• Jack In The Box:	21
• Burger King:	20

- Dunkin' Donuts/Baskin-Robbins (co-branded): 19
- Papa John's: 15
- The Coffee Bean & Tea Leaf: 14

Houston, Texas

- Subway: 378
- McDonald's: 289
- Starbucks: 255
- Jack In The Box: 203
- Sonic: 175
- Domino's Pizza: 121
- Taco Bell: 121
- Pizza Hut: 117
- Church's Chicken: 111
- Whataburger: 111

Indianapolis, Indiana

- Subway: 152
- McDonald's: 99
- Starbucks: 86
- Taco Bell: 53
- Burger King: 52
- Wendy's: 51
- Arby's: 49
- Dairy Queen: 49
- Pizza Hut: 49
- Papa John's Pizza: 37

Jacksonville, Florida

- Subway: 104
- McDonald's: 74
- Starbucks: 50
- Wendy's: 44
- Burger King: 39
- Dunkin' Donuts: 37
- Pizza Hut: 35
- Domino's Pizza: 35
- KFC: 29
- Firehouse Subs: 25

Las Vegas, Nevada

- Starbucks: 156
- Subway: 138

• McDonald's:	105
• Jack in the Box:	57
• Panda Express:	57
• Taco Bell:	49
• Burger King:	43
• Pizza Hut:	42
• Quiznos:	41
• Port of Subs:	38

Little Rock, Arkansas

• Subway:	67
• Sonic:	43
• McDonald's:	38
• Taco Bell:	22
• Burger King:	21
• Starbucks:	21
• Wendy's:	21
• Pizza Pro:	20
• Pizza Hut:	19
• KFC:	18

Los Angeles, California

• Starbucks Coffee:	774
• Subway:	755
• McDonald's:	455
• Jack in the Box:	308
• Taco Bell:	268
• Quiznos:	225
• Pizza Hut:	217
• Dunkin' Donuts/Baskin- Robbins (co-branded):	213
• El Pollo Loco:	213
• Burger King:	197

Louisville, Kentucky

• Subway:	111
• McDonald's:	72
• Dairy Queen:	43
• Taco Bell:	39
• Arby's:	38
• KFC:	37
• Wendy's:	36
• Starbucks:	35

- Dominos: 34
- Papa John's Pizza: 34

Madison, Wisconsin

- Subway: 57
- McDonald's: 32
- Pizza Hut: 19
- Culver's: 17
- Cousins Subs: 15
- Starbucks: 13
- Taco Bell: 13
- Arby's: 12
- Dippin' Dots: 11
- KFC: 10

Miami, Florida

- Subway: 375
- McDonald's: 238
- Starbucks: 200
- Burger King: 157
- Wendy's: 144
- Dunkin' Donuts: 139
- Quiznos: 98
- KFC: 92
- Pizza Hut: 86
- Domino's Pizza: 80

Milwaukee, Wisconsin

- Subway: 111
- McDonald's: 81
- Cousins Subs: 63
- Starbucks: 53
- Pizza Hut: 34
- Taco Bell: 34
- Culver's: 29
- Burger King: 27
- Dairy Queen: 27
- KFC: 22

Minneapolis, Minnesota

- Subway: 265
- Caribou Coffee: 184
- McDonald's: 133
- Dairy Queen: 116

• Starbucks:	108
• Domino's Pizza:	78
• Burger King:	75
• Taco Bell:	64
• Arby's:	57
• Jimmy John's:	56

Mobile, Alabama

• Subway:	35
• McDonald's:	30
• Waffle House:	19
• Pizza Hut:	15
• Church's Chicken:	13
• Burger King:	10
• Checkers Drive-In:	10
• Sonic Drive-In:	10
• Hardee's:	9
• Starbucks Coffee:	9

Montgomery, Alabama

• Subway:	42
• McDonald's:	22
• Hardee's:	13
• Pizza Hut:	11
• Wendy's:	11
• KFC:	10
• Sonic:	9
• Taco Bell:	9
• Waffle House:	9
• Church's Chicken:	8

Nashville, Tennessee

• Subway:	133
• McDonald's:	81
• Sonic:	60
• Starbucks:	47
• Taco Bell:	45
• Wendy's:	44
• Pizza Hut:	40
• Waffle House:	34
• Arby's:	32
• KFC:	31

New Orleans, Louisiana

• Subway:	120
• McDonald's:	71
• Smoothie King:	42
• Burger King:	41
• Wendy's:	41
• Popeyes:	35
• Domino's Pizza:	32
• PJ's Coffee & Wine Bar:	28
• Quiznos:	28
• Pizza Hut:	27

New York, New York

• Dunkin' Donuts:	879
• Subway:	879
• Starbucks:	592
• McDonald's:	591
• Dunkin' Donuts/Baskin-Robbins (co-branded):	341
• Wendy's:	221
• Burger King:	219
• Domino's Pizza:	219
• Blimpie:	177
• KFC:	176

Omaha, Nebraska

• Subway:	61
• Burger King:	42
• McDonald's:	34
• Starbucks:	30
• Godfather's Pizza:	29
• Taco Bell:	26
• Arby's:	23
• Pizza Hut:	23
• Dairy Queen:	20
• Jimmy John's:	19

Orlando, Florida

• Subway:	129
• McDonald's:	109
• Starbucks:	89
• Burger King:	67
• Wendy's:	60
• Pizza Hut:	57

- Taco Bell: 53
- KFC: 42
- Domino's Pizza: 37
- Blimpie: 35

Philadelphia, Pennsylvania

- Dunkin' Donuts: 325
- McDonald's: 223
- Subway: 217
- Starbucks: 171
- Rita's Italian Ice: 140
- Wendy's: 97
- Burger King: 96
- Domino's Pizza: 78
- KFC: 76
- Taco Bell: 76

Phoenix, Arizona

- Subway: 270
- Starbucks: 263
- McDonald's: 179
- Jack in the Box: 125
- Taco Bell: 109
- Burger King: 88
- Pizza Hut: 78
- Wendy's: 69
- Domino's Pizza: 68
- Panda Express: 67

Pittsburgh, Pennsylvania

- Subway: 202
- McDonald's: 107
- Wendy's: 67
- Dairy Queen: 66
- Pizza Hut: 65
- Starbucks: 65
- Fox's Pizza Den: 62
- Vocelli Pizza: 44
- KFC: 40
- Taco Bell: 38

Portland, Maine

- Dunkin' Donuts: 60
- Subway: 38

- McDonald's: 21
- Starbucks: 19
- Dairy Queen: 12
- Burger King: 11
- Domino's Pizza: 11
- Wendy's: 11
- KFC: 7
- Pizza Hut: 7

Portland, Oregon

- Starbucks: 251
- Subway: 174
- McDonald's: 83
- Papa Murphy's Pizza: 54
- Taco Bell: 54
- Quiznos: 48
- Burger King: 44
- Dunkin' Donuts/Baskin-Robbins (co-branded): 41
- Wendy's: 36
- Domino's Pizza: 35

Providence, Rhode Island

- Dunkin' Donuts: 266
- Subway: 107
- McDonald's: 56
- Burger King: 40
- D'Angelo Sandwiches: 36
- Domino's Pizza: 35
- Wendy's: 35
- Starbucks: 28
- Papa Gino's: 25
- KFC: 24

Raleigh, North Carolina

- Subway: 88
- McDonald's: 58
- Starbucks: 43
- Wendy's: 37
- Burger King: 31
- Bojangles: 26
- Domino's Pizza: 26
- Quiznos: 25

- Chick-Fil-A: 24
- KFC: 24

Richmond, Virginia

- Subway: 97
- McDonald's: 63
- Starbucks: 51
- Burger King: 39
- Wendy's: 35
- Hardee's: 28
- Pizza Hut: 28
- Dominos's Pizza: 25
- Arby's: 22
- KFC: 22

Sacramento, California

- Starbucks: 186
- Subway: 157
- McDonald's: 93
- Taco Bell: 67
- Round Table Pizza: 59
- Jack In The Box: 43
- Jamba Juice: 41
- Dunkin' Donuts/Baskin-Robbins (co-branded): 40
- KFC: 38
- Burger King: 34

Salem, Oregon

- Starbucks: 24
- Subway: 23
- McDonald's: 21
- Dairy Queen: 12
- Figaro's Pizza: 11
- Burger King: 10
- Papa Murphy's: 10
- Quiznos: 9
- Dunkin' Donuts/Baskin-Robbins (co-branded): 8
- Taco Bell: 8

San Diego, California

- Starbucks: 240
- Subway: 196

• McDonald's:	118
• Jack In The Box:	94
• Taco Bell:	58
• KFC:	52
• Panda Express:	52
• Burger King:	48
• Pizza Hut:	47
• Wendy's:	35

San Francisco, California

• Starbucks:	364
• Subway:	243
• McDonald's:	104
• Peet's:	90
• Burger King:	87
• Taco Bell:	85
• Round Table Pizza:	84
• Quiznos:	78
• Jack In The Box:	70
• Jamba Juice:	64

Seattle, Washington

• Starbucks Coffee:	449
• Subway:	264
• McDonald's:	135
• Quiznos:	88
• Jack in the Box:	80
• Tully's Coffee:	78
• Dunkin' Donuts/Baskin- Robbins (co-branded):	75
• Taco Bell:	65
• Papa Murphy's Pizza:	64
• Taco Time:	60

St. Louis, Missouri

• Subway:	187
• McDonald's:	138
• Taco Bell:	92
• Domino's Pizza:	81
• Dairy Queen:	73
• Pizza Hut:	71
• Jack in the Box:	68
• Starbucks Coffee:	66

- Hardee's: 54
- Quiznos: 54

Tampa, Florida

- Subway: 204
- McDonald's: 122
- Starbucks: 87
- Dunkin' Donuts: 72
- Wendy's: 66
- Burger King: 65
- Taco Bell: 57
- Pizza Hut: 51
- Quiznos: 51
- Hungry Howie's: 48

Trenton, New Jersey

- Dunkin' Donuts: 26
- Subway: 22
- McDonald's: 11
- Starbucks: 10
- Rita's Italian Ice: 9
- Dunkin' Donuts/Baskin-Robbins (co-branded): 7
- Wendy's: 7
- Burger King: 6
- Taco Bell: 6
- Blimpie: 5

15.2 Market Resources

Chain Store Guide, 10117 Princess Palm Avenue, Suite 375, Tampa, FL 33610.
(800) 927-9292. (www.chainstoreguide.com)

16

RESTAURANT SALES

16.1 Overview

The United States Office of Management and Budget (OMB, www.omb.gov) defines a Metropolitan Statistical Area (MSA) as one or more adjacent counties or county equivalents that has at least one urban core area with a population of at least 50,000, plus adjacent territory that has a high degree of social and economic integration with the core as measured by commuting ties. There are 366 MSAs.

A Micropolitan Statistical Area (μSA) is defined as an urban area based around a core city or town with a population of 10,000 to 49,999. There are 576 μSAs.

Combined, there are 942 MSAs and μSAs.

16.2 Restaurant Sales, Unit Counts, and Sales Per Unit

Restaurant sales per capita, sales as a percentage of income, unit counts, and average sales per unit for each for each MSA and μSA are as follows (source: *Restaurant Business*, April 2013):

	Restaurant Sales			
	Restaurant Sales Per Capita	As Percent Of Income	Number of Restaurants	Sales Per Restaurant
• Abbeville, LA:	\$ 793	3.66%	98	\$ 474,489
• Aberdeen, SD:	\$1,932	7.99%	107	\$ 743,925
• Aberdeen, WA:	\$ 962	4.81%	190	\$ 371,052
• Abilene, TX:	\$1,495	6.94%	331	\$ 757,703
• Ada, OK:	\$1,240	6.29%	64	\$ 739,062
• Adrian, MI:	\$1,241	6.86%	180	\$ 681,666
• Akron, OH:	\$1,678	6.61%	1,517	\$ 773,500
• Alamogordo, NM:	\$ 935	4.77%	94	\$ 676,595
• Albany, GA:	\$1,391	7.96%	311	\$ 708,360
• Albany-Lebanon, OR:	\$1,023	5.84%	240	\$ 509,166
• Albany-Schenectady, NY:	\$1,572	5.19%	2,241	\$ 612,003
• Albemarle, NC:	\$1,254	5.76%	122	\$ 623,770
• Albert Lea, MN:	\$1,529	6.49%	70	\$ 678,571
• Albertville, AL:	\$1,158	5.79%	186	\$ 594,623
• Albuquerque, NM:	\$1,485	5.76%	1,790	\$ 756,815
• Alexander City, AL:	\$ 730	3.73%	74	\$ 510,810
• Alexandria, MN:	\$1,686	6.66%	83	\$ 738,554
• Alexandria, LA:	\$1,160	5.77%	269	\$ 669,516

• Alice, TX:	\$ 989	5.54%	80	\$ 518,750
• Allegan, MI:	\$1,234	6.90%	199	\$ 688,442
• Allentown-Bethlehem, PA-NJ:	\$1,266	4.56%	1,864	\$ 563,304
• Alma, MI:	\$1,035	6.63%	76	\$ 568,421
• Alpena, MI:	\$1,483	6.93%	70	\$ 617,142
• Altoona, PA:	\$1,873	8.08%	320	\$ 744,062
• Altus, OK:	\$1,362	6.28%	66	\$ 545,454
• Amarillo, TX:	\$1,757	7.62%	626	\$ 725,559
• Americus, GA:	\$ 801	5.56%	57	\$ 522,807
• Ames, IA:	\$2,069	8.46%	187	\$ 993,582
• Amsterdam, NY:	\$ 991	4.55%	104	\$ 472,115
• Anchorage, AK:	\$1,506	4.37%	983	\$ 607,019
• Anderson, IN:	\$1,495	8.02%	265	\$ 737,358
• Anderson, SC:	\$1,400	7.38%	392	\$ 679,081
• Andrews, TX:	\$ 788	3.16%	34	\$ 376,470
• Angola, IN:	\$1,791	7.80%	96	\$ 631,250
• Ann Arbor, MI:	\$1,852	5.92%	815	\$ 799,263
• Anniston-Oxford, AL:	\$1,613	7.98%	230	\$ 819,130
• Appleton, WI:	\$1,922	7.60%	596	\$ 740,100
• Arcadia, FL:	\$ 652	4.92%	48	\$ 475,000
• Ardmore, OK:	\$1,249	6.08%	122	\$ 594,262
• Arkadelphia, AR:	\$1,701	8.94%	48	\$ 804,166
• Asheville, NC:	\$1,621	7.23%	1,006	\$ 699,105
• Ashland, OH:	\$1,603	9.49%	94	\$ 906,382
• Ashtabula, OH:	\$1,328	7.02%	249	\$ 539,357
• Astoria, OR:	\$2,648	10.90%	200	\$ 495,500
• Atchison, KS:	\$1,196	6.84%	33	\$ 603,030
• Athens, TX:	\$1,094	6.11%	161	\$ 537,888
• Athens, OH:	\$2,092	11.95%	154	\$ 879,870
• Athens, TN:	\$1,167	5.90%	97	\$ 635,051
• Athens, GA:	\$1,946	8.68%	458	\$ 825,327
• Atlanta, GA:	\$1,553	5.93%	11,535	\$ 736,038
• Atlantic City, NJ:	\$3,086	12.04%	835	\$1,012,694
• Auburn, IN:	\$1,341	6.78%	89	\$ 643,820
• Auburn, NY:	\$1,247	5.30%	173	\$ 572,254
• Auburn-Opelika, AL:	\$1,441	6.53%	301	\$ 704,983
• Augusta, GA-SC:	\$1,424	6.21%	1,149	\$ 703,568
• Augusta-Waterville, ME:	\$1,510	6.07%	266	\$ 690,601
• Austin, MN:	\$1,150	4.99%	73	\$ 623,287
• Austin, TX:	\$1,607	5.53%	4,059	\$ 737,718
• Bainbridge, GA:	\$ 872	5.15%	44	\$ 545,454
• Bakersfield-Delano, CA:	\$1,006	5.49%	1,460	\$ 596,232
• Baltimore-Towson, MD:	\$1,558	4.51%	6,172	\$ 694,539
• Bangor, ME:	\$1,533	6.59%	318	\$ 740,566

• Baraboo, WI:	\$3,261	13.35%	210	\$ 972,857
• Barnstable Town, MA:	\$2,787	8.23%	892	\$ 673,654
• Barre, VT:	\$1,371	4.78%	150	\$ 546,000
• Bartlesville, OK:	\$1,218	4.69%	99	\$ 640,404
• Bastrop, LA:	\$ 718	4.43%	35	\$ 557,142
• Batavia, NY:	\$1,672	6.79%	135	\$ 741,481
• Batesville, AR:	\$1,064	5.73%	56	\$ 705,357
• Baton Rouge, LA:	\$1,486	5.80%	1,749	\$ 692,510
• Battle Creek, MI:	\$1,428	6.70%	278	\$ 691,726
• Bay City, TX:	\$1,097	4.74%	89	\$ 455,056
• Bay City, MI:	\$1,882	8.29%	238	\$ 840,756
• Beatrice, NE:	\$1,457	6.54%	61	\$ 518,032
• Beaumont-Port Arthur, TX:	\$1,509	7.02%	765	\$ 774,248
• Beaver Dam, WI:	\$ 923	4.26%	182	\$ 448,901
• Beckley, WV:	\$1,658	7.79%	188	\$ 700,531
• Bedford, IN:	\$1,260	6.44%	74	\$ 787,837
• Beeville, TX:	\$ 837	5.24%	52	\$ 521,153
• Bellefontaine, OH:	\$1,229	6.51%	108	\$ 517,592
• Bellingham, WA:	\$1,265	5.00%	487	\$ 537,371
• Bemidji, MN:	\$1,377	6.88%	81	\$ 786,419
• Bend, OR:	\$1,632	7.99%	475	\$ 558,315
• Bennettsville, SC:	\$ 575	4.17%	43	\$ 374,418
• Bennington, VT:	\$1,773	6.58%	112	\$ 582,142
• Berlin, NH-VT:	\$1,018	4.88%	93	\$ 421,505
• Big Rapids, MI:	\$1,032	5.59%	76	\$ 596,052
• Big Spring, TX:	\$1,032	5.79%	74	\$ 491,891
• Billings, MT:	\$1,921	7.53%	403	\$ 774,689
• Binghamton, NY:	\$1,502	6.07%	645	\$ 577,674
• Birmingham-Hoover, AL:	\$1,379	5.72%	2,278	\$ 688,235
• Bishop, CA:	\$1,560	5.83%	65	\$ 443,076
• Bismarck, ND:	\$1,792	6.39%	227	\$ 895,154
• Blackfoot, ID:	\$ 617	3.74%	55	\$ 520,000
• Blacksburg, VA:	\$1,465	6.84%	319	\$ 748,589
• Bloomington, IN:	\$1,822	8.35%	415	\$ 860,240
• Bloomington-Normal, IL:	\$1,905	6.37%	364	\$ 898,626
• Bloomsburg-Berwick, PA:	\$1,409	6.30%	182	\$ 665,934
• Bluefield, WV-VA:	\$1,371	7.12%	223	\$ 661,434
• Blytheville, AR:	\$1,012	5.47%	90	\$ 510,000
• Bogalusa, LA:	\$ 698	4.18%	74	\$ 444,594
• Boise City-Nampa, ID:	\$1,375	6.41%	1,299	\$ 678,367
• Bonham, TX:	\$ 614	3.01%	54	\$ 387,037
• Boone, IA:	\$ 905	3.45%	47	\$ 504,255
• Boone, NC:	\$3,301	17.76%	170	\$1,002,352
• Borger, TX:	\$1,312	5.91%	48	\$ 604,166

• Boston-Cambridge, MA-NH:	\$1,748	4.68%	11,733	\$ 690,965
• Boulder, CO:	\$2,029	5.60%	827	\$ 748,367
• Bowling Green, KY:	\$2,055	9.87%	279	\$ 954,480
• Bozeman, MT:	\$2,126	7.90%	284	\$ 700,704
• Bradford, PA:	\$ 931	4.78%	103	\$ 388,349
• Brainerd, MN:	\$1,765	7.60%	257	\$ 626,459
• Branson, MO:	\$3,282	16.57%	297	\$ 953,872
• Bremerton-Silverdale, WA:	\$1,220	4.23%	558	\$ 570,071
• Brenham, TX:	\$1,428	6.46%	88	\$ 550,000
• Brevard, NC:	\$ 951	4.29%	70	\$ 441,428
• Bridgeport-Stamford, CT:	\$1,308	2.96%	2,482	\$ 493,674
• Brigham City, UT:	\$ 926	4.50%	57	\$ 822,807
• Brookhaven, MS:	\$ 988	5.58%	56	\$ 616,071
• Brookings, OR:	\$1,409	6.10%	74	\$ 428,378
• Brookings, SD:	\$2,545	11.73%	88	\$ 940,909
• Brownsville, TN:	\$ 846	4.74%	34	\$ 450,000
• Brownsville-Harlingen, TX:	\$1,230	9.00%	787	\$ 661,880
• Brownwood, TX:	\$1,121	5.37%	86	\$ 498,837
• Brunswick, GA:	\$1,903	8.37%	311	\$ 694,855
• Bucyrus, OH:	\$1,228	6.34%	80	\$ 658,750
• Buffalo-Niagara Falls, NY:	\$1,737	6.61%	2,689	\$ 731,089
• Burley, ID:	\$1,098	6.35%	103	\$ 466,019
• Burlington, IA-IL:	\$1,593	7.60%	127	\$ 589,763
• Burlington, NC:	\$1,797	8.98%	335	\$ 836,119
• Burlington-South Burlington, VT:	\$1,573	5.35%	506	\$ 665,415
• Butte-Silver Bow, MT:	\$1,789	8.28%	116	\$ 533,620
• Cadillac, MI:	\$1,311	7.22%	94	\$ 664,893
• Calhoun, GA:	\$ 917	5.33%	88	\$ 585,227
• Cambridge, MD:	\$1,182	4.65%	68	\$ 567,647
• Cambridge, OH:	\$1,208	6.39%	80	\$ 600,000
• Camden, AR:	\$ 725	3.82%	54	\$ 409,259
• Campbellsville, KY:	\$1,080	5.90%	41	\$ 658,536
• Canon City, CO:	\$ 863	4.58%	74	\$ 559,459
• Canton, IL:	\$1,116	5.66%	90	\$ 456,666
• Canton-Massillon, OH:	\$1,647	7.38%	880	\$ 754,545
• Cape Coral-Fort Myers, FL:	\$1,607	7.03%	1,492	\$ 695,509
• Cape Girardeau-Jackson, MO-IL:	\$1,614	7.23%	205	\$ 770,731
• Carbondale, IL:	\$1,951	9.28%	158	\$ 747,468
• Carlsbad, NM:	\$1,148	4.48%	95	\$ 658,947
• Carson City, NV:	\$1,390	5.97%	145	\$ 540,000
• Casper, WY:	\$1,658	6.21%	183	\$ 701,639
• Cedar City, UT:	\$1,187	8.00%	89	\$ 632,584
• Cedar Rapids, IA:	\$1,545	5.55%	587	\$ 694,037
• Cedartown, GA:	\$1,110	7.23%	71	\$ 639,436

• Celina, OH:	\$1,304	6.62%	90	\$ 592,222
• Central City, KY:	\$1,129	5.99%	57	\$ 614,035
• Centralia, WA:	\$1,154	6.31%	191	\$ 467,015
• Centralia, IL:	\$ 946	4.61%	71	\$ 522,535
• Chambersburg, PA:	\$1,112	4.71%	261	\$ 648,659
• Champaign-Urbana, IL:	\$2,090	8.06%	606	\$ 802,805
• Charleston, SC:	\$1,751	6.60%	1,716	\$ 717,424
• Charleston, WV:	\$1,625	6.45%	746	\$ 659,785
• Charleston-Mattoon, IL:	\$1,917	8.92%	159	\$ 784,905
• Charlotte-Gastonia, NC-SC:	\$1,571	6.13%	3,875	\$ 746,038
• Charlottesville, VA:	\$1,528	4.95%	514	\$ 619,066
• Chattanooga, TN-GA:	\$1,603	6.87%	1,229	\$ 703,580
• Chester, SC:	\$ 796	4.72%	53	\$ 490,566
• Cheyenne, WY:	\$1,866	7.02%	187	\$ 935,828
• Chicago, IL-IN-WI:	\$1,586	5.43%	22,380	\$ 677,247
• Chico, CA:	\$1,445	6.33%	483	\$ 663,354
• Chillicothe, OH:	\$1,525	7.34%	145	\$ 825,517
• Cincinnati, OH-KY-IN:	\$1,661	6.22%	4,438	\$ 803,785
• Claremont, NH:	\$ 691	2.57%	70	\$ 425,714
• Clarksburg, WV:	\$1,372	6.85%	210	\$ 620,000
• Clarksdale, MS:	\$ 917	6.24%	50	\$ 470,000
• Clarksville, TN-KY:	\$1,352	6.76%	534	\$ 714,232
• Clearlake, CA:	\$1,097	6.35%	142	\$ 490,845
• Cleveland, MS:	\$1,011	5.84%	63	\$ 534,920
• Cleveland, OH:	\$1,729	6.67%	4,814	\$ 738,803
• Cleveland, TN:	\$1,331	7.40%	205	\$ 766,829
• Clewiston, FL:	\$ 847	5.68%	74	\$ 447,297
• Clinton, IA:	\$1,327	5.36%	119	\$ 545,378
• Clovis, NM:	\$1,278	6.40%	99	\$ 660,606
• Coeur d'Alene, ID:	\$1,514	7.41%	374	\$ 583,957
• Coffeyville, KS:	\$1,314	6.19%	75	\$ 600,000
• Coldwater, MI:	\$ 997	6.14%	78	\$ 576,923
• College Station-Bryan, TX:	\$1,683	8.01%	528	\$ 749,431
• Colorado Springs, CO:	\$1,426	5.40%	1,320	\$ 732,424
• Columbia, MO:	\$1,913	8.04%	441	\$ 778,231
• Columbia, SC:	\$1,590	6.88%	1,616	\$ 775,742
• Columbia, TN:	\$1,551	6.99%	186	\$ 684,946
• Columbus, GA-AL:	\$1,505	7.15%	658	\$ 707,294
• Columbus, IN:	\$1,808	8.98%	166	\$ 862,048
• Columbus, MS:	\$1,377	6.68%	133	\$ 616,541
• Columbus, OH:	\$1,830	6.72%	4,287	\$ 804,548
• Columbus, NE:	\$1,648	6.93%	79	\$ 688,607
• Concord, NH:	\$1,437	4.78%	294	\$ 717,346
• Connersville, IN:	\$ 910	5.43%	44	\$ 502,272

• Cookeville, TN:	\$1,430	7.43%	226	\$ 677,433
• Coos Bay, OR:	\$1,034	4.91%	166	\$ 392,168
• Corbin, KY:	\$1,015	6.82%	66	\$ 554,545
• Cordele, GA:	\$1,506	8.78%	49	\$ 738,775
• Corinth, MS:	\$1,174	6.76%	85	\$ 511,764
• Cornelia, GA:	\$1,132	6.00%	91	\$ 541,758
• Corning, NY:	\$1,006	4.16%	195	\$ 511,282
• Corpus Christi, TX:	\$1,618	7.26%	1,030	\$ 683,398
• Corsicana, TX:	\$1,136	5.57%	82	\$ 670,731
• Cortland, NY:	\$1,334	6.03%	123	\$ 535,772
• Corvallis, OR:	\$1,383	5.17%	183	\$ 655,737
• Coshocton, OH:	\$ 953	5.37%	57	\$ 619,298
• Crawfordsville, IN:	\$1,244	6.90%	75	\$ 644,000
• Crescent City, CA:	\$ 931	5.39%	55	\$ 485,454
• Crestview, FL:	\$2,600	9.27%	602	\$ 804,152
• Crossville, TN:	\$1,226	6.68%	120	\$ 585,833
• Crowley, LA:	\$ 856	4.53%	99	\$ 538,383
• Cullman, AL:	\$1,053	5.87%	128	\$ 664,062
• Culpeper, VA:	\$1,015	3.69%	75	\$ 650,666
• Cumberland, MD-WV:	\$1,426	7.19%	217	\$ 672,811
• Dallas-Fort Worth, TX:	\$1,576	5.72%	14,162	\$ 747,034
• Dalton, GA:	\$1,132	6.81%	253	\$ 641,501
• Danville, KY:	\$1,172	6.27%	77	\$ 812,987
• Danville, IL:	\$1,215	6.55%	174	\$ 568,390
• Danville, VA:	\$1,273	6.49%	188	\$ 713,829
• Daphne-Fairhope-Foley, AL:	\$2,063	7.72%	548	\$ 722,810
• Davenport-Moline, IA-IL:	\$1,908	7.40%	1,084	\$ 674,538
• Dayton, OH:	\$1,771	7.84%	1,820	\$ 826,978
• Decatur, AL:	\$1,190	5.56%	254	\$ 722,834
• Decatur, IL:	\$1,896	9.32%	259	\$ 810,038
• Decatur, IN:	\$1,307	7.64%	58	\$ 774,137
• Defiance, OH:	\$1,388	6.42%	84	\$ 639,285
• Del Rio, TX:	\$1,152	7.05%	92	\$ 618,478
• Deltona-Daytona Beach, FL:	\$1,570	6.67%	1,157	\$ 677,960
• Deming, NM:	\$ 992	5.98%	45	\$ 562,222
• Denver-Aurora, CO:	\$1,690	5.33%	6,166	\$ 730,651
• DeRidder, LA:	\$ 556	2.58%	41	\$ 497,560
• Des Moines, IA:	\$1,772	6.20%	1,369	\$ 767,640
• Detroit-Warren-Livonia, MI:	\$1,601	6.44%	9,295	\$ 736,148
• Dickinson, ND:	\$2,184	7.78%	89	\$ 667,415
• Dillon, SC:	\$ 959	6.67%	58	\$ 518,965
• Dixon, IL:	\$1,032	4.65%	92	\$ 390,217
• Dodge City, KS:	\$1,163	6.22%	59	\$ 698,305
• Dothan, AL:	\$2,415	12.20%	336	\$1,061,011

• Douglas, GA:	\$ 701	4.41%	77	\$ 472,727
• Dover, DE:	\$1,482	6.14%	321	\$ 774,766
• Dublin, GA:	\$1,249	7.04%	114	\$ 628,070
• DuBois, PA:	\$1,306	7.21%	190	\$ 557,894
• Dubuque, IA:	\$2,083	8.32%	270	\$ 739,259
• Duluth, MN-WI:	\$1,706	7.24%	690	\$ 692,028
• Dumas, TX:	\$ 931	5.10%	48	\$ 427,083
• Duncan, OK:	\$ 939	4.21%	86	\$ 495,348
• Dunn, NC:	\$ 802	4.22%	173	\$ 578,034
• Durango, CO:	\$2,083	6.91%	195	\$ 562,051
• Durant, OK:	\$1,144	5.79%	87	\$ 577,011
• Durham-Chapel Hill, NC:	\$1,569	5.52%	1,078	\$ 761,502
• Dyersburg, TN:	\$1,257	6.65%	85	\$ 562,352
• Eagle Pass, TX:	\$ 960	7.93%	89	\$ 612,359
• East Liverpool-Salem, OH:	\$1,089	7.12%	192	\$ 608,333
• East Stroudsburg, PA:	\$1,333	5.40%	422	\$ 536,729
• Easton, MD:	\$2,449	6.42%	122	\$ 768,852
• Eau Claire, WI:	\$1,800	7.76%	445	\$ 665,168
• Edwards, CO:	\$3,283	12.37%	302	\$ 641,390
• Effingham, IL:	\$2,553	10.42%	92	\$ 952,173
• El Campo, TX:	\$1,219	7.04%	104	\$ 484,615
• El Centro, CA:	\$ 815	5.17%	253	\$ 585,770
• El Dorado, AR:	\$ 906	4.42%	87	\$ 428,735
• El Paso, TX:	\$1,294	7.65%	1,424	\$ 767,837
• Elizabeth City, NC:	\$1,337	6.04%	117	\$ 735,042
• Elizabethtown, KY:	\$1,468	6.71%	213	\$ 855,868
• Elk City, OK:	\$1,735	8.30%	68	\$ 573,529
• Elkhart-Goshen, IN:	\$1,403	8.72%	380	\$ 740,789
• Elko, NV:	\$1,330	4.92%	140	\$ 500,714
• Ellensburg, WA:	\$1,694	7.55%	150	\$ 480,666
• Elmira, NY:	\$1,847	7.48%	210	\$ 781,428
• Emporia, KS:	\$1,654	8.31%	97	\$ 625,773
• Enid, OK:	\$1,460	6.82%	144	\$ 615,972
• Enterprise-Ozark, AL:	\$1,024	4.56%	191	\$ 541,361
• Erie, PA:	\$1,671	7.65%	658	\$ 714,741
• Escanaba, MI:	\$1,378	6.43%	91	\$ 562,637
• Espanola, NM:	\$ 875	4.34%	66	\$ 539,393
• Eufaula, AL-GA:	\$ 862	5.59%	52	\$ 482,692
• Eugene-Springfield, OR:	\$1,499	6.61%	926	\$ 577,105
• Eureka-Arcata-Fortuna, CA:	\$1,261	5.55%	362	\$ 470,718
• Evanston, WY:	\$1,321	5.87%	56	\$ 491,071
• Evansville, IN-KY:	\$1,786	7.83%	783	\$ 823,882
• Fairbanks, AK:	\$1,421	5.10%	267	\$ 529,962
• Fairmont, MN:	\$1,717	6.68%	45	\$ 782,222

• Fairmont, WV:	\$1,192	5.40%	139	\$ 487,050
• Fallon, NV:	\$ 947	4.12%	50	\$ 472,000
• Fargo, ND-MN:	\$2,277	8.41%	477	\$1,032,075
• Faribault-Northfield, MN:	\$1,095	4.78%	105	\$ 675,238
• Farmington, MO:	\$1,247	6.55%	130	\$ 631,538
• Farmington, NM:	\$1,204	6.16%	213	\$ 712,206
• Fayetteville, AR-MO:	\$1,424	6.48%	968	\$ 715,702
• Fayetteville, NC:	\$1,355	6.19%	701	\$ 741,369
• Fergus Falls, MN:	\$1,126	4.77%	106	\$ 607,547
• Fernley, NV:	\$ 660	3.86%	83	\$ 416,867
• Findlay, OH:	\$3,705	15.83%	183	\$1,525,683
• Fitzgerald, GA:	\$ 620	3.84%	41	\$ 417,073
• Flagstaff, AZ:	\$2,569	13.53%	372	\$ 929,301
• Flint, MI:	\$1,525	8.82%	832	\$ 765,384
• Florence, SC:	\$1,454	8.12%	426	\$ 705,868
• Florence-Muscle Shoals, AL:	\$1,414	6.48%	288	\$ 723,958
• Fond du Lac, WI:	\$1,802	7.60%	242	\$ 764,049
• Forest City, NC:	\$1,004	5.60%	129	\$ 523,255
• Forrest City, AR:	\$ 804	5.80%	45	\$ 493,333
• Fort Collins-Loveland, CO:	\$1,916	6.53%	771	\$ 776,783
• Fort Dodge, IA:	\$1,644	8.19%	95	\$ 644,210
• Fort Leonard Wood, MO:	\$1,027	6.02%	106	\$ 525,471
• Fort Madison-Keokuk, IA-MO:	\$1,249	5.93%	109	\$ 483,486
• Fort Morgan, CO:	\$ 883	4.63%	58	\$ 429,310
• Fort Payne, AL:	\$1,011	5.65%	104	\$ 697,115
• Fort Polk South, LA:	\$1,001	4.78%	97	\$ 535,051
• Fort Smith, AR-OK:	\$1,214	6.21%	568	\$ 645,070
• Fort Valley, GA:	\$ 987	5.06%	43	\$ 641,860
• Fort Wayne, IN:	\$1,797	7.79%	837	\$ 908,482
• Frankfort, KY:	\$1,507	6.47%	157	\$ 685,350
• Frankfort, IN:	\$1,032	5.15%	55	\$ 618,181
• Fredericksburg, TX:	\$1,761	6.59%	78	\$ 574,358
• Freeport, IL:	\$1,465	7.76%	121	\$ 573,553
• Fremont, OH:	\$1,640	7.64%	134	\$ 740,298
• Fremont, NE:	\$1,394	6.47%	90	\$ 571,111
• Fresno, CA:	\$1,073	5.70%	1,769	\$ 581,910
• Gadsden, AL:	\$1,269	7.33%	178	\$ 742,134
• Gaffney, SC:	\$1,382	10.09%	109	\$ 707,339
• Gainesville, FL:	\$1,740	7.11%	604	\$ 773,841
• Gainesville, GA:	\$1,121	5.62%	320	\$ 655,312
• Gainesville, TX:	\$1,625	8.03%	79	\$ 788,607
• Galesburg, IL:	\$1,399	6.85%	173	\$ 572,832
• Gallup, NM:	\$1,246	8.97%	132	\$ 719,696
• Garden City, KS:	\$1,274	6.77%	76	\$ 627,631

• Gardnerville Ranchos, NV:	\$1,714	5.79%	130	\$ 627,692
• Georgetown, SC:	\$1,858	8.40%	197	\$ 563,959
• Gettysburg, PA:	\$1,141	4.45%	197	\$ 587,817
• Gillette, WY:	\$1,305	4.25%	91	\$ 676,923
• Glasgow, KY:	\$1,343	7.62%	119	\$ 591,596
• Glens Falls, NY:	\$1,708	6.58%	404	\$ 545,792
• Gloversville, NY:	\$1,045	4.66%	146	\$ 391,780
• Goldsboro, NC:	\$1,211	5.84%	206	\$ 734,951
• Granbury, TX:	\$1,245	4.23%	131	\$ 576,335
• Grand Forks, ND-MN:	\$1,984	7.91%	234	\$ 826,923
• Grand Island, NE:	\$1,532	7.11%	176	\$ 648,863
• Grand Junction, CO:	\$1,753	8.41%	293	\$ 882,252
• Grand Rapids-Wyoming, MI:	\$1,780	8.52%	1,661	\$ 842,143
• Grants, NM:	\$ 805	5.44%	40	\$ 567,500
• Grants Pass, OR:	\$1,206	6.15%	196	\$ 513,775
• Great Bend, KS:	\$1,305	5.44%	63	\$ 580,952
• Great Falls, MT:	\$1,788	7.58%	218	\$ 676,146
• Greeley, CO:	\$1,156	5.43%	439	\$ 699,544
• Green Bay, WI:	\$1,847	7.38%	814	\$ 710,933
• Greeneville, TN:	\$1,039	5.64%	118	\$ 616,101
• Greensboro-High Point, NC:	\$1,659	7.86%	1,625	\$ 754,953
• Greensburg, IN:	\$1,371	6.12%	62	\$ 579,032
• Greenville, MS:	\$1,022	7.36%	98	\$ 516,326
• Greenville, NC:	\$1,525	6.69%	372	\$ 805,376
• Greenville, OH:	\$ 946	4.89%	85	\$ 585,882
• Greenville-Mauldin-Easley, SC:	\$1,696	7.66%	1,553	\$ 720,605
• Greenwood, SC:	\$1,462	8.56%	155	\$ 660,645
• Greenwood, MS:	\$ 799	5.65%	61	\$ 542,622
• Grenada, MS:	\$1,384	6.94%	51	\$ 582,352
• Gulfport-Biloxi, MS:	\$2,384	10.96%	586	\$1,053,924
• Guymon, OK:	\$1,000	4.82%	48	\$ 460,416
• Hagerstown, MD-WV:	\$1,364	5.54%	546	\$ 685,164
• Hammond, LA:	\$1,350	6.78%	281	\$ 597,153
• Hanford-Corcoran, CA:	\$ 730	4.42%	223	\$ 504,484
• Hannibal, MO:	\$1,324	5.94%	97	\$ 532,989
• Harriman, TN:	\$ 833	3.69%	70	\$ 635,714
• Harrisburg, IL:	\$1,401	7.11%	55	\$ 638,181
• Harrisburg-Carlisle, PA:	\$1,635	5.77%	1,309	\$ 695,492
• Harrison, AR:	\$1,037	5.49%	86	\$ 547,674
• Harrisonburg, VA:	\$1,368	6.08%	239	\$ 738,493
• Hartford-West Hartford, CT:	\$1,428	4.21%	2,775	\$ 624,756
• Hastings, NE:	\$1,543	6.38%	85	\$ 680,000
• Hattiesburg, MS:	\$1,921	9.59%	360	\$ 792,500
• Havre, MT:	\$1,540	7.27%	44	\$ 586,363

• Hays, KS:	\$2,035	8.43%	77	\$ 768,831
• Heber, UT:	\$1,118	3.90%	46	\$ 619,565
• Helena, AR:	\$ 911	5.41%	33	\$ 581,818
• Helena, MT:	\$1,621	6.10%	200	\$ 622,000
• Henderson, NC:	\$1,333	7.96%	82	\$ 734,146
• Hereford, TX:	\$ 785	4.56%	37	\$ 421,621
• Hickory-Lenoir-Morganton, NC:	\$1,321	7.11%	688	\$ 697,529
• Hilo, HI:	\$1,537	7.53%	497	\$ 583,501
• Hilton Head Island-Beaufort, SC:	\$2,414	8.57%	645	\$ 723,255
• Hinesville-Fort Stewart, GA:	\$ 882	4.82%	123	\$ 600,813
• Hobbs, NM:	\$1,066	5.31%	130	\$ 543,076
• Holland-Grand Haven, MI:	\$1,386	5.99%	433	\$ 862,124
• Homosassa Springs, FL:	\$1,033	5.30%	258	\$ 562,790
• Honolulu, HI:	\$1,931	6.51%	2,418	\$ 779,197
• Hood River, OR:	\$1,957	7.98%	88	\$ 509,090
• Hope, AR:	\$ 755	4.24%	43	\$ 553,488
• Hot Springs, AR:	\$1,789	8.36%	285	\$ 617,894
• Houghton, MI:	\$1,640	8.40%	105	\$ 606,666
• Houma-Thibodaux, LA:	\$1,414	5.88%	481	\$ 614,553
• Houston, TX:	\$1,431	5.21%	12,920	\$ 692,561
• Hudson, NY:	\$1,036	3.36%	165	\$ 388,484
• Humboldt, TN:	\$ 910	4.72%	89	\$ 513,483
• Huntingdon, PA:	\$ 829	4.31%	76	\$ 500,000
• Huntington, IN:	\$1,241	6.22%	80	\$ 578,750
• Huntington-Ashland, WV-KY-OH:	\$1,605	7.89%	610	\$ 756,229
• Huntsville, AL:	\$1,559	5.18%	873	\$ 776,288
• Huntsville, TX:	\$1,359	8.75%	119	\$ 780,672
• Huron, SD:	\$1,308	5.84%	40	\$ 580,000
• Hutchinson, KS:	\$1,307	6.04%	114	\$ 742,105
• Hutchinson, MN:	\$1,344	5.30%	64	\$ 759,375
• Idaho Falls, ID:	\$1,375	6.72%	246	\$ 749,593
• Indiana, PA:	\$1,276	5.84%	163	\$ 703,067
• Indianapolis-Carmel, IN:	\$1,766	7.11%	3,764	\$ 846,785
• Indianola, MS:	\$ 525	4.37%	36	\$ 425,000
• Iowa City, IA:	\$2,125	7.57%	396	\$ 845,707
• Iron Mountain, MI-WI:	\$1,461	6.89%	100	\$ 448,000
• Ithaca, NY:	\$1,585	6.04%	270	\$ 598,148
• Jackson, MS:	\$1,445	6.28%	1,120	\$ 713,482
• Jackson, WY-ID:	\$3,178	10.38%	135	\$ 753,333
• Jackson, MI:	\$1,648	8.64%	318	\$ 824,842
• Jackson, TN:	\$1,896	8.68%	289	\$ 756,747
• Jacksonville, FL:	\$1,594	6.46%	3,085	\$ 711,247
• Jacksonville, IL:	\$1,616	6.89%	91	\$ 723,076
• Jacksonville, NC:	\$1,524	8.03%	353	\$ 786,118

• Jacksonville, TX:	\$1,058	6.26%	76	\$ 717,105
• Jamestown, ND:	\$1,708	6.84%	58	\$ 618,965
• Jamestown-Fredonia, NY:	\$1,443	7.09%	317	\$ 608,517
• Janesville, WI:	\$1,628	7.34%	362	\$ 718,784
• Jasper, IN:	\$2,744	13.71%	131	\$1,154,961
• Jefferson City, MO:	\$1,206	5.15%	290	\$ 629,310
• Jennings, LA:	\$1,028	4.98%	53	\$ 616,981
• Jesup, GA:	\$ 876	6.02%	52	\$ 515,384
• Johnson City, TN:	\$1,594	6.95%	410	\$ 781,951
• Johnstown, PA:	\$1,296	6.14%	356	\$ 523,595
• Jonesboro, AR:	\$1,532	7.37%	250	\$ 765,600
• Joplin, MO:	\$1,644	8.36%	409	\$ 717,359
• Juneau, AK:	\$1,289	3.70%	84	\$ 511,904
• Kahului-Wailuku, HI:	\$2,494	8.83%	493	\$ 803,651
• Kalamazoo-Portage, MI:	\$1,784	7.36%	702	\$ 839,031
• Kalispell, MT:	\$1,839	8.21%	280	\$ 602,500
• Kankakee-Bradley, IL:	\$1,610	7.53%	279	\$ 657,706
• Kansas City, MO-KS:	\$1,622	5.85%	4,162	\$ 808,000
• Kapaa, HI:	\$2,168	9.52%	215	\$ 689,767
• Kearney, NE:	\$1,753	7.46%	132	\$ 718,181
• Keene, NH:	\$1,312	5.39%	150	\$ 670,666
• Kendallville, IN:	\$ 925	5.50%	81	\$ 543,209
• Kennett, MO:	\$ 984	6.04%	70	\$ 450,000
• Kennewick-Pasco-Richland, WA:	\$1,165	4.78%	485	\$ 658,762
• Kerrville, TX:	\$1,251	4.82%	119	\$ 525,210
• Ketchikan, AK:	\$1,481	4.96%	53	\$ 386,792
• Key West, FL:	\$4,041	13.24%	451	\$ 662,527
• Kill Devil Hills, NC:	\$5,305	20.56%	271	\$ 680,442
• Killeen-Temple-Fort Hood, TX:	\$1,300	5.97%	719	\$ 757,719
• Kingsport-Bristol, TN-VA:	\$1,409	6.81%	586	\$ 746,928
• Kingston, NY:	\$1,183	4.29%	572	\$ 377,272
• Kingsville, TX:	\$1,560	8.14%	82	\$ 624,390
• Kinston, NC:	\$1,303	6.77%	115	\$ 670,434
• Kirksville, MO:	\$1,450	8.19%	61	\$ 708,196
• Klamath Falls, OR:	\$1,181	6.01%	161	\$ 490,062
• Knoxville, TN:	\$1,795	7.70%	1,634	\$ 782,374
• Kodiak, AK:	\$1,893	6.97%	37	\$ 727,027
• Kokomo, IN:	\$1,865	10.35%	221	\$ 830,769
• La Crosse, WI-MN:	\$1,993	7.97%	350	\$ 771,142
• La Follette, TN:	\$ 852	5.37%	72	\$ 476,388
• La Grande, OR:	\$1,373	5.95%	65	\$ 552,307
• Laconia, NH:	\$1,969	8.18%	159	\$ 747,798
• Lafayette, IN:	\$1,918	8.99%	422	\$ 935,308
• Lafayette, LA:	\$1,934	7.50%	744	\$ 731,989

• LaGrange, GA:	\$1,341	6.62%	151	\$ 609,271
• Lake Charles, LA:	\$1,541	6.83%	409	\$ 762,102
• Lake City, FL:	\$1,205	7.74%	128	\$ 639,843
• Lake Havasu City-Kingman, AZ:	\$1,409	7.93%	486	\$ 594,032
• Lakeland-Winter Haven, FL:	\$1,015	5.62%	951	\$ 660,357
• Lamesa, TX:	\$ 762	5.05%	21	\$ 495,238
• Lancaster, PA:	\$1,322	5.44%	935	\$ 747,486
• Lancaster, SC:	\$ 772	4.66%	126	\$ 486,507
• Lansing-East Lansing, MI:	\$1,688	6.98%	951	\$ 827,865
• Laramie, WY:	\$1,724	6.53%	94	\$ 689,361
• Laredo, TX:	\$1,292	9.10%	443	\$ 769,751
• Las Cruces, NM:	\$1,173	6.19%	339	\$ 756,932
• Las Vegas, NM:	\$1,017	5.48%	58	\$ 512,068
• Las Vegas, NV:	\$1,965	8.76%	4,818	\$ 812,121
• Laurel, MS:	\$1,415	7.88%	141	\$ 851,773
• Laurinburg, NC:	\$1,885	12.89%	57	\$1,173,684
• Lawrence, KS:	\$1,984	8.03%	286	\$ 789,860
• Lawrenceburg, TN:	\$ 813	4.63%	65	\$ 530,769
• Lawton, OK:	\$1,567	7.55%	239	\$ 837,656
• Lebanon, MO:	\$1,364	7.14%	78	\$ 624,358
• Lebanon, NH-VT:	\$1,513	5.49%	479	\$ 550,939
• Lebanon, PA:	\$1,078	4.14%	250	\$ 582,800
• Levelland, TX:	\$ 753	3.57%	44	\$ 390,909
• Lewisburg, TN:	\$ 772	4.42%	50	\$ 482,000
• Lewisburg, PA:	\$1,626	7.58%	81	\$ 897,530
• Lewiston, ID-WA:	\$1,460	6.30%	154	\$ 588,311
• Lewiston-Auburn, ME:	\$1,642	7.26%	254	\$ 691,732
• Lewistown, PA:	\$ 975	5.16%	89	\$ 515,730
• Lexington, NE:	\$1,370	7.08%	74	\$ 489,189
• Lexington Park, MD:	\$1,116	3.02%	196	\$ 628,061
• Lexington-Fayette, KY:	\$1,903	7.88%	1,050	\$ 884,095
• Liberal, KS:	\$2,881	17.24%	54	\$1,268,518
• Lima, OH:	\$1,827	9.15%	237	\$ 815,611
• Lincoln, IL:	\$1,112	5.02%	68	\$ 489,705
• Lincoln, NE:	\$1,842	7.16%	706	\$ 813,314
• Lincolnton, NC:	\$ 877	3.78%	112	\$ 624,107
• Little Rock, AR:	\$1,632	6.50%	1,549	\$ 760,813
• Lock Haven, PA:	\$1,054	5.57%	92	\$ 448,913
• Logan, UT-ID:	\$1,032	5.70%	153	\$ 877,777
• Logansport, IN:	\$1,042	6.03%	84	\$ 479,761
• London, KY:	\$1,448	7.37%	101	\$ 859,405
• Longview, TX:	\$1,425	7.12%	482	\$ 648,547
• Longview, WA:	\$1,070	5.27%	213	\$ 521,126
• Los Alamos, NM:	\$1,057	1.93%	35	\$ 560,000

• Los Angeles-Long Beach, CA:	\$1,476	5.37%	31,124	\$ 620,427
• Louisville, KY-IN:	\$1,856	7.49%	2,654	\$ 914,883
• Lubbock, TX:	\$1,796	7.90%	627	\$ 848,165
• Lufkin, TX:	\$1,234	6.84%	164	\$ 667,682
• Lumberton, NC:	\$ 915	6.06%	190	\$ 660,526
• Lynchburg, VA:	\$1,372	6.47%	477	\$ 736,897
• Macomb, IL:	\$1,875	10.01%	82	\$ 743,902
• Macon, GA:	\$1,465	6.76%	492	\$ 695,528
• Madera-Chowchilla, CA:	\$ 702	3.84%	213	\$ 511,737
• Madison, IN:	\$1,324	6.48%	80	\$ 530,000
• Madison, WI:	\$1,945	6.25%	1,470	\$ 774,897
• Madisonville, KY:	\$1,258	5.87%	83	\$ 710,843
• Magnolia, AR:	\$ 702	3.65%	35	\$ 485,714
• Malone, NY:	\$ 942	4.59%	122	\$ 397,540
• Manchester-Nashua, NH:	\$1,517	4.45%	872	\$ 700,802
• Manhattan, KS:	\$1,524	7.03%	260	\$ 785,384
• Manitowoc, WI:	\$1,341	5.97%	203	\$ 531,034
• Mankato-North Mankato, MN:	\$1,751	7.58%	198	\$ 864,141
• Mansfield, OH:	\$1,833	8.83%	281	\$ 797,864
• Marble Falls, TX:	\$1,049	4.13%	103	\$ 443,689
• Marinette, WI-MI:	\$1,500	7.88%	216	\$ 453,703
• Marion, IN:	\$1,455	8.55%	138	\$ 732,608
• Marion, OH:	\$1,307	7.23%	130	\$ 662,307
• Marion-Herrin, IL:	\$1,647	7.16%	149	\$ 739,597
• Marquette, MI:	\$1,589	6.69%	155	\$ 701,290
• Marshall, MN:	\$2,206	9.34%	60	\$ 953,333
• Marshall, MO:	\$1,234	7.15%	56	\$ 510,714
• Marshall, TX:	\$ 960	4.10%	95	\$ 677,894
• Marshalltown, IA:	\$1,228	6.13%	81	\$ 627,160
• Marshfield-Wisconsin Rapids, WI:	\$1,270	5.23%	187	\$ 508,021
• Martin, TN:	\$1,033	5.72%	66	\$ 546,969
• Martinsville, VA:	\$ 986	5.22%	118	\$ 560,169
• Maryville, MO:	\$1,836	10.13%	50	\$ 866,000
• Mason City, IA:	\$2,102	8.69%	157	\$ 684,713
• Mayfield, KY:	\$ 681	3.23%	55	\$ 470,909
• Maysville, KY:	\$1,349	6.80%	64	\$ 668,750
• McAlester, OK:	\$1,160	5.62%	90	\$ 584,444
• McAllen-Edinburg-Mission, TX:	\$1,133	8.23%	1,365	\$ 685,274
• McComb, MS:	\$ 912	5.34%	83	\$ 586,746
• McMinnville, TN:	\$ 902	5.61%	68	\$ 530,882
• McPherson, KS:	\$1,597	5.84%	77	\$ 607,792
• Meadville, PA:	\$1,057	5.72%	180	\$ 521,111
• Medford, OR:	\$1,474	6.49%	543	\$ 560,773
• Memphis, TN-MS-AR:	\$1,456	6.18%	2,666	\$ 730,195

• Menomonie, WI:	\$1,397	6.56%	95	\$ 648,421
• Merced, CA:	\$ 887	5.09%	375	\$ 625,333
• Meridian, MS:	\$1,174	6.12%	198	\$ 635,858
• Merrill, WI:	\$1,252	5.77%	98	\$ 363,265
• Mexico, MO:	\$ 804	4.03%	40	\$ 515,000
• Miami, OK:	\$ 851	4.77%	55	\$ 492,727
• Miami-Fort Lauderdale, FL:	\$1,484	6.10%	12,987	\$ 658,635
• Michigan City-La Porte, IN:	\$1,680	8.53%	274	\$ 682,116
• Middlesborough, KY:	\$1,405	8.95%	53	\$ 762,264
• Midland, TX:	\$1,452	5.01%	314	\$ 667,834
• Midland, MI:	\$1,406	4.84%	159	\$ 747,798
• Milledgeville, GA:	\$1,370	8.69%	111	\$ 644,144
• Milwaukee-Waukesha, WI:	\$1,630	6.11%	3,464	\$ 738,481
• Minden, LA:	\$ 896	4.62%	78	\$ 475,641
• Mineral Wells, TX:	\$1,298	5.76%	76	\$ 480,263
• Minneapolis, MN-WI:	\$1,640	5.18%	6,096	\$ 905,068
• Minot, ND:	\$1,839	7.22%	197	\$ 701,015
• Missoula, MT:	\$2,202	8.71%	325	\$ 752,923
• Mitchell, SD:	\$2,129	9.41%	63	\$ 785,714
• Moberly, MO:	\$ 993	5.46%	47	\$ 534,042
• Mobile, AL:	\$1,364	6.21%	772	\$ 728,108
• Modesto, CA:	\$1,165	6.03%	958	\$ 638,726
• Monroe, LA:	\$1,639	7.53%	374	\$ 784,759
• Monroe, MI:	\$1,289	6.23%	260	\$ 748,461
• Monroe, WI:	\$1,277	4.88%	88	\$ 536,363
• Montgomery, AL:	\$1,406	5.92%	747	\$ 721,820
• Montrose, CO:	\$1,199	5.68%	73	\$ 668,493
• Morehead City, NC:	\$2,082	8.86%	221	\$ 644,796
• Morgan City, LA:	\$1,095	5.29%	120	\$ 490,000
• Morgantown, WV:	\$1,711	6.98%	365	\$ 634,246
• Morristown, TN:	\$ 996	5.54%	212	\$ 650,943
• Moscow, ID:	\$1,469	7.45%	87	\$ 645,977
• Moses Lake, WA:	\$ 835	4.37%	172	\$ 454,069
• Moultrie, GA:	\$ 755	4.50%	66	\$ 524,242
• Mount Airy, NC:	\$1,327	6.65%	166	\$ 589,759
• Mount Pleasant, MI:	\$1,899	11.11%	128	\$1,053,125
• Mount Pleasant, TX:	\$1,173	7.24%	60	\$ 643,333
• Mount Sterling, KY:	\$ 832	4.75%	56	\$ 673,214
• Mount Vernon, IL:	\$1,689	8.27%	89	\$ 891,011
• Mount Vernon, OH:	\$1,191	5.58%	106	\$ 693,396
• Mount Vernon-Anacortes, WA:	\$1,486	5.77%	311	\$ 572,668
• Mountain Home, AR:	\$1,196	5.64%	89	\$ 558,426
• Mountain Home, ID:	\$ 988	4.99%	53	\$ 475,471
• Muncie, IN:	\$1,732	8.94%	228	\$ 893,421

• Murray, KY:	\$1,797	8.43%	76	\$ 897,368
• Muscatine, IA:	\$1,180	6.21%	125	\$ 512,000
• Muskegon-Norton Shores, MI:	\$1,455	8.08%	329	\$ 752,887
• Muskogee, OK:	\$1,394	7.39%	164	\$ 603,048
• Myrtle Beach, SC:	\$3,771	17.68%	1,431	\$ 750,174
• Nacogdoches, TX:	\$2,122	11.69%	129	\$1,095,348
• Napa, CA:	\$1,572	4.86%	311	\$ 708,038
• Naples-Marco Island, FL:	\$1,812	5.79%	915	\$ 661,748
• Nashville-Davidson, TN:	\$1,664	6.72%	3,625	\$ 756,965
• Natchez, MS-LA:	\$1,092	7.46%	117	\$ 492,307
• Natchitoches, LA:	\$1,255	6.59%	85	\$ 580,000
• New Bern, NC:	\$1,290	5.80%	238	\$ 701,680
• New Castle, IN:	\$ 959	5.19%	74	\$ 635,135
• New Castle, PA:	\$1,131	5.68%	184	\$ 552,173
• New Haven-Milford, CT:	\$1,364	4.35%	2,306	\$ 508,369
• New Iberia, LA:	\$1,011	4.89%	124	\$ 600,000
• New Orleans-Metairie, LA:	\$1,842	7.18%	3,447	\$ 651,203
• New Philadelphia-Dover, OH:	\$1,389	7.48%	236	\$ 544,067
• New Ulm, MN:	\$1,954	8.35%	69	\$ 723,188
• New York, NY-NJ-PA:	\$1,408	4.07%	55,310	\$ 487,559
• Newberry, SC:	\$ 816	3.71%	66	\$ 469,696
• Newport, TN:	\$1,212	8.30%	65	\$ 660,000
• Newton, IA:	\$1,268	6.37%	79	\$ 581,012
• Niles-Benton Harbor, MI:	\$1,491	6.69%	385	\$ 608,311
• Nogales, AZ:	\$ 823	5.71%	79	\$ 500,000
• Norfolk, NE:	\$1,725	7.75%	112	\$ 744,642
• North Platte, NE:	\$1,808	6.92%	90	\$ 748,888
• North Port-Bradenton, FL:	\$1,626	6.20%	1,659	\$ 707,474
• North Vernon, IN:	\$ 669	3.70%	36	\$ 516,666
• North Wilkesboro, NC:	\$ 850	5.55%	108	\$ 539,814
• Norwalk, OH:	\$1,192	5.77%	107	\$ 660,747
• Norwich-New London, CT:	\$1,635	4.88%	716	\$ 623,044
• Oak Harbor, WA:	\$ 916	3.32%	145	\$ 506,206
• Oak Hill, WV:	\$1,135	6.47%	86	\$ 597,674
• Ocala, FL:	\$1,131	6.38%	622	\$ 610,771
• Ocean City, NJ:	\$4,111	12.44%	546	\$ 721,062
• Ocean Pines, MD:	\$8,039	25.36%	371	\$1,117,250
• Odessa, TX:	\$1,569	8.19%	319	\$ 706,583
• Ogden-Clearfield, UT:	\$1,059	4.49%	757	\$ 792,338
• Ogdensburg-Massena, NY:	\$ 897	4.22%	220	\$ 454,090
• Oil City, PA:	\$1,132	5.47%	111	\$ 554,054
• Okeechobee, FL:	\$1,199	6.74%	79	\$ 611,392
• Oklahoma City, OK:	\$1,668	6.78%	2,837	\$ 768,699
• Olean, NY:	\$1,210	5.68%	168	\$ 570,833

• Olympia, WA:	\$1,483	5.04%	623	\$ 622,953
• Omaha-Council Bluffs, NE-IA:	\$1,766	6.50%	1,943	\$ 809,881
• Oneonta, NY:	\$1,193	5.25%	174	\$ 421,839
• Ontario, OR-ID:	\$ 971	6.38%	116	\$ 451,724
• Opelousas-Eunice, LA:	\$ 904	4.62%	144	\$ 525,694
• Orangeburg, SC:	\$1,345	8.47%	180	\$ 681,666
• Orlando-Kissimmee-Sanford, FL:	\$1,979	8.95%	5,223	\$ 840,072
• Oshkosh-Neenah, WI:	\$1,644	6.89%	393	\$ 705,089
• Oskaloosa, IA:	\$1,202	6.10%	45	\$ 606,666
• Ottawa-Streator, IL:	\$1,485	6.27%	478	\$ 475,523
• Ottumwa, IA:	\$1,618	7.45%	88	\$ 646,590
• Owatonna, MN:	\$1,686	6.92%	71	\$ 866,197
• Owensboro, KY:	\$1,803	9.12%	232	\$ 901,724
• Owosso, MI:	\$ 982	4.59%	115	\$ 587,826
• Oxford, MS:	\$1,843	9.50%	130	\$ 706,153
• Oxnard-Ventura, CA:	\$1,325	4.09%	1,760	\$ 634,772
• Paducah, KY-IL:	\$2,058	8.46%	273	\$ 749,816
• Pahrump, NV:	\$ 885	5.30%	74	\$ 525,675
• Palatka, FL:	\$ 883	4.96%	127	\$ 515,748
• Palestine, TX:	\$ 724	4.27%	74	\$ 568,918
• Palm Bay-Melbourne, FL:	\$1,552	5.74%	1,222	\$ 698,527
• Palm Coast, FL:	\$1,088	4.52%	164	\$ 656,707
• Pampa, TX:	\$ 891	4.10%	47	\$ 451,063
• Panama City-Lynn Haven, FL:	\$2,641	11.51%	577	\$ 786,308
• Paragould, AR:	\$ 991	5.51%	71	\$ 607,042
• Paris, TN:	\$1,047	5.19%	75	\$ 452,000
• Paris, TX:	\$1,008	4.83%	99	\$ 513,131
• Parkersburg-Marietta, WV-OH:	\$1,610	7.06%	365	\$ 716,438
• Parsons, KS:	\$1,028	5.26%	43	\$ 511,627
• Pascagoula, MS:	\$1,153	5.32%	303	\$ 622,112
• Payson, AZ:	\$1,365	6.62%	129	\$ 556,589
• Pecos, TX:	\$ 874	7.54%	28	\$ 428,571
• Pella, IA:	\$1,520	6.24%	71	\$ 714,084
• Pendleton-Hermiston, OR:	\$ 992	4.84%	174	\$ 508,620
• Pensacola-Ferry Pass-Brent, FL:	\$1,555	6.67%	885	\$ 815,254
• Peoria, IL:	\$1,683	6.40%	948	\$ 674,789
• Peru, IN:	\$ 940	5.75%	58	\$ 587,931
• Philadelphia, PA-NJ-DE-MD:	\$1,488	4.75%	14,602	\$ 613,888
• Phoenix Lake-Cedar Ridge, CA:	\$1,144	5.07%	148	\$ 418,243
• Phoenix-Mesa-Glendale, AZ:	\$1,415	6.14%	7,549	\$ 814,611
• Picayune, MS:	\$ 876	4.28%	88	\$ 553,409
• Pierre, SD:	\$1,583	5.69%	45	\$ 726,666
• Pierre Part, LA:	\$ 267	1.20%	20	\$ 305,000
• Pine Bluff, AR:	\$ 978	5.56%	156	\$ 610,256

• Pittsburg, KS:	\$1,788	9.17%	94	\$ 747,872
• Pittsburgh, PA:	\$1,720	6.16%	5,937	\$ 684,807
• Pittsfield, MA:	\$1,914	7.06%	448	\$ 553,348
• Plainview, TX:	\$ 930	5.49%	61	\$ 560,655
• Platteville, WI:	\$1,400	7.08%	151	\$ 474,834
• Plattsburgh, NY:	\$1,508	6.69%	206	\$ 598,058
• Plymouth, IN:	\$1,471	8.77%	99	\$ 698,989
• Pocatello, ID:	\$1,384	7.44%	180	\$ 710,555
• Point Pleasant, WV-OH:	\$ 889	4.38%	97	\$ 534,020
• Ponca City, OK:	\$1,216	6.31%	92	\$ 603,260
• Pontiac, IL:	\$1,131	5.02%	82	\$ 535,365
• Poplar Bluff, MO:	\$1,322	6.70%	89	\$ 644,943
• Port Angeles, WA:	\$1,167	5.00%	192	\$ 442,187
• Port St. Lucie, FL:	\$1,189	5.31%	805	\$ 641,614
• Portales, NM:	\$1,068	5.79%	29	\$ 779,310
• Portland, ME:	\$2,100	7.10%	1,584	\$ 686,426
• Portland-Vancouver, OR-WA:	\$1,586	5.85%	5,809	\$ 627,612
• Portsmouth, OH:	\$1,253	6.72%	142	\$ 697,183
• Pottsville, PA:	\$ 954	4.54%	346	\$ 404,335
• Poughkeepsie-Newburgh, NY:	\$1,476	4.84%	1,997	\$ 499,449
• Prescott, AZ:	\$1,405	7.05%	521	\$ 574,088
• Price, UT:	\$1,273	6.40%	52	\$ 519,230
• Prineville, OR:	\$1,077	5.93%	46	\$ 486,956
• Providence, RI-MA:	\$1,763	6.49%	4,092	\$ 689,125
• Provo-Orem, UT:	\$1,038	6.13%	731	\$ 791,928
• Pueblo, CO:	\$1,458	7.18%	357	\$ 663,025
• Pullman, WA:	\$1,353	6.26%	107	\$ 575,700
• Punta Gorda, FL:	\$1,589	6.76%	368	\$ 701,358
• Quincy, IL-MO:	\$1,446	6.21%	171	\$ 653,801
• Racine, WI:	\$1,427	5.76%	417	\$ 668,585
• Raleigh-Cary, NC:	\$1,624	5.50%	2,484	\$ 786,513
• Rapid City, SD:	\$2,026	8.04%	306	\$ 865,359
• Raymondville, TX:	\$ 585	5.70%	31	\$ 416,129
• Reading, PA:	\$1,233	5.09%	927	\$ 551,132
• Red Bluff, CA:	\$ 927	4.86%	121	\$ 491,735
• Red Wing, MN:	\$1,472	5.25%	102	\$ 667,647
• Redding, CA:	\$1,311	6.09%	424	\$ 553,301
• Reno-Sparks, NV:	\$1,693	7.17%	1,034	\$ 705,319
• Rexburg, ID:	\$1,085	7.32%	89	\$ 624,719
• Richmond, VA:	\$1,573	5.37%	2,606	\$ 775,249
• Richmond, IN:	\$1,873	11.70%	169	\$ 756,804
• Richmond-Berea, KY:	\$1,328	6.52%	158	\$ 863,924
• Rio Grande City-Roma, TX:	\$ 731	6.34%	95	\$ 482,105
• Riverside, CA:	\$1,143	5.42%	7,481	\$ 670,966

• Riverton, WY:	\$1,235	5.80%	112	\$ 453,571
• Roanoke, VA:	\$1,675	6.61%	714	\$ 727,450
• Roanoke Rapids, NC:	\$1,045	5.98%	126	\$ 623,809
• Rochelle, IL:	\$1,141	4.61%	114	\$ 527,192
• Rochester, MN:	\$1,666	5.29%	380	\$ 831,052
• Rochester, NY:	\$1,514	5.66%	2,428	\$ 658,649
• Rock Springs, WY:	\$1,495	5.10%	124	\$ 537,903
• Rockford, IL:	\$1,523	6.96%	716	\$ 738,407
• Rockingham, NC:	\$1,026	6.27%	87	\$ 549,425
• Rockland, ME:	\$1,498	5.90%	115	\$ 516,521
• Rocky Mount, NC:	\$1,353	6.74%	282	\$ 728,723
• Rolla, MO:	\$1,623	7.72%	98	\$ 742,857
• Rome, GA:	\$1,477	7.93%	194	\$ 727,835
• Roseburg, OR:	\$1,156	6.61%	281	\$ 444,483
• Roswell, NM:	\$1,162	7.17%	105	\$ 732,380
• Ruidoso, NM:	\$1,843	7.55%	86	\$ 437,209
• Russellville, AR:	\$1,199	6.55%	153	\$ 665,359
• Ruston, LA:	\$1,232	6.12%	100	\$ 781,000
• Rutland, VT:	\$1,717	6.68%	217	\$ 481,566
• Sacramento--Arden, CA:	\$1,336	4.86%	4,531	\$ 651,114
• Safford, AZ:	\$ 769	5.01%	72	\$ 490,277
• Saginaw, MI:	\$1,685	7.84%	372	\$ 895,698
• Salem, OR:	\$1,125	5.40%	794	\$ 567,380
• Salina, KS:	\$1,641	6.93%	135	\$ 757,037
• Salinas, CA:	\$1,426	6.03%	961	\$ 636,628
• Salisbury, MD:	\$1,400	6.16%	239	\$ 737,656
• Salisbury, NC:	\$1,229	7.63%	242	\$ 698,347
• Salt Lake City, UT:	\$1,532	6.51%	2,374	\$ 756,065
• San Angelo, TX:	\$1,643	7.57%	264	\$ 718,181
• San Antonio-New Braunfels, TX:	\$1,665	6.90%	4,813	\$ 780,968
• San Diego-Carlsbad, CA:	\$1,474	5.06%	7,059	\$ 666,850
• San Francisco-Oakland, CA:	\$1,534	3.76%	12,426	\$ 550,450
• San Jose-Sunnyvale, CA:	\$1,421	3.48%	4,056	\$ 665,853
• San Luis Obispo-P. Robles, CA:	\$1,740	6.15%	863	\$ 553,070
• Sandusky, OH:	\$2,075	8.55%	244	\$ 649,180
• Sanford, NC:	\$1,130	5.64%	111	\$ 609,009
• Santa Barbara, CA:	\$1,412	5.06%	1,084	\$ 560,977
• Santa Cruz-Watsonville, CA:	\$1,578	5.22%	674	\$ 627,299
• Santa Fe, NM:	\$1,906	7.39%	412	\$ 682,038
• Santa Rosa-Petaluma, CA:	\$2,949	10.32%	1,233	\$1,178,994
• Sault Ste. Marie, MI:	\$1,378	7.21%	91	\$ 592,307
• Savannah, GA:	\$1,935	8.29%	994	\$ 710,462
• Sayre, PA:	\$ 855	3.89%	127	\$ 425,984
• Scottsbluff, NE:	\$1,521	6.94%	100	\$ 575,000

• Scottsboro, AL:	\$ 898	4.85%	93	\$ 515,053
• Scottsburg, IN:	\$1,272	6.37%	40	\$ 755,000
• Scranton-Wilkes-Barre, PA:	\$1,740	7.30%	1,816	\$ 538,931
• Seaford, DE:	\$1,959	7.74%	593	\$ 674,367
• Searcy, AR:	\$1,280	7.10%	135	\$ 753,333
• Seattle-Tacoma-Bellevue, WA:	\$1,584	4.70%	9,341	\$ 604,528
• Sebastian-Vero Beach, FL:	\$1,388	4.89%	323	\$ 605,572
• Sebring, FL:	\$1,183	6.33%	171	\$ 686,549
• Sedalia, MO:	\$1,466	7.71%	84	\$ 735,714
• Selinsgrove, PA:	\$1,592	7.75%	83	\$ 766,265
• Selma, AL:	\$ 737	4.90%	59	\$ 533,898
• Seneca, SC:	\$ 815	3.40%	127	\$ 478,740
• Seneca Falls, NY:	\$1,161	5.32%	74	\$ 551,351
• Sevierville, TN:	\$3,561	18.95%	369	\$ 900,813
• Seymour, IN:	\$1,456	6.93%	93	\$ 683,870
• Shawnee, OK:	\$1,312	7.37%	127	\$ 736,220
• Sheboygan, WI:	\$1,840	8.01%	305	\$ 691,803
• Shelby, NC:	\$1,097	5.97%	174	\$ 610,344
• Shelbyville, TN:	\$1,049	6.05%	62	\$ 779,032
• Shelton, WA:	\$ 697	3.36%	110	\$ 393,636
• Sheridan, WY:	\$1,957	7.26%	90	\$ 638,888
• Sherman-Denison, TX:	\$1,432	6.16%	266	\$ 657,142
• Show Low, AZ:	\$ 903	5.16%	201	\$ 482,089
• Shreveport-Bossier City, LA:	\$1,605	6.87%	908	\$ 724,118
• Sidney, OH:	\$1,283	7.08%	96	\$ 657,291
• Sierra Vista-Douglas, AZ:	\$1,167	5.11%	252	\$ 628,174
• Sikeston, MO:	\$1,198	5.91%	80	\$ 585,000
• Silver City, NM:	\$1,232	5.71%	71	\$ 507,042
• Silverthorne, CO:	\$4,167	14.98%	189	\$ 615,873
• Sioux City, IA-NE-SD:	\$2,011	9.62%	382	\$ 761,256
• Sioux Falls, SD:	\$1,943	7.33%	501	\$ 920,758
• Snyder, TX:	\$ 987	5.12%	45	\$ 371,111
• Somerset, KY:	\$1,184	5.72%	107	\$ 712,149
• Somerset, PA:	\$ 993	4.94%	146	\$ 523,972
• South Bend-Mishawaka, IN-MI:	\$1,547	7.17%	656	\$ 750,000
• Southern Pines-Pinehurst, NC:	\$1,484	5.18%	229	\$ 587,336
• Spartanburg, SC:	\$1,475	6.91%	600	\$ 712,500
• Spearfish, SD:	\$2,174	8.57%	80	\$ 667,500
• Spencer, IA:	\$1,625	6.80%	52	\$ 515,384
• Spirit Lake, IA:	\$3,185	10.70%	83	\$ 659,036
• Spokane, WA:	\$1,522	6.17%	1,125	\$ 649,422
• Springfield, IL:	\$1,906	6.64%	608	\$ 668,092
• Springfield, MA:	\$1,502	5.90%	1,607	\$ 648,226
• Springfield, MO:	\$1,739	8.25%	946	\$ 816,384

• Springfield, OH:	\$1,453	7.35%	255	\$ 780,000
• St. Cloud, MN:	\$1,715	7.38%	418	\$ 783,971
• St. George, UT:	\$1,212	6.19%	243	\$ 727,572
• St. Joseph, MO-KS:	\$1,486	7.10%	251	\$ 756,972
• St. Louis, MO-IL:	\$1,734	6.34%	6,076	\$ 805,579
• St. Marys, GA:	\$1,344	6.28%	109	\$ 620,183
• St. Marys, PA:	\$1,044	5.32%	69	\$ 476,811
• Starkville, MS:	\$1,602	7.99%	89	\$ 860,674
• State College, PA:	\$1,732	7.26%	325	\$ 828,923
• Statesboro, GA:	\$1,625	10.65%	160	\$ 772,500
• Statesville-Mooresville, NC:	\$1,542	6.74%	345	\$ 729,855
• Staunton-Waynesboro, VA:	\$1,317	5.77%	234	\$ 671,794
• Stephenville, TX:	\$1,795	8.44%	108	\$ 643,518
• Sterling, CO:	\$1,360	7.74%	54	\$ 566,666
• Sterling, IL:	\$1,286	5.48%	146	\$ 513,013
• Steubenville-Weirton, OH-WV:	\$1,379	6.88%	349	\$ 481,088
• Stevens Point, WI:	\$1,850	7.69%	190	\$ 683,157
• Stillwater, OK:	\$2,173	10.61%	165	\$1,036,363
• Stockton, CA:	\$ 999	4.84%	1,236	\$ 572,977
• Storm Lake, IA:	\$1,312	6.25%	49	\$ 551,020
• Sturgis, MI:	\$1,047	5.74%	127	\$ 502,362
• Sulphur Springs, TX:	\$1,112	5.27%	64	\$ 618,750
• Summerville, GA:	\$ 488	3.15%	31	\$ 400,000
• Sumter, SC:	\$1,367	8.46%	194	\$ 757,216
• Sunbury, PA:	\$ 786	3.90%	184	\$ 404,347
• Susanville, CA:	\$ 604	3.36%	49	\$ 414,285
• Sweetwater, TX:	\$1,148	5.53%	47	\$ 374,468
• Syracuse, NY:	\$1,579	6.03%	1,587	\$ 658,979
• Tahlequah, OK:	\$ 755	4.59%	72	\$ 512,500
• Talladega-Sylacauga, AL:	\$ 835	5.59%	133	\$ 508,270
• Tallahassee, FL:	\$1,673	7.50%	816	\$ 771,200
• Tallulah, LA:	\$1,000	7.52%	25	\$ 476,000
• Tampa-St. Petersburg, FL:	\$1,555	6.38%	6,191	\$ 720,578
• Taos, NM:	\$1,873	8.25%	112	\$ 550,000
• Taylorville, IL:	\$1,079	4.86%	91	\$ 414,285
• Terre Haute, IN:	\$1,670	7.91%	396	\$ 729,040
• Texarkana, TX-AR:	\$1,615	7.68%	302	\$ 733,443
• The Dalles, OR:	\$1,474	6.87%	72	\$ 520,833
• The Villages, FL:	\$1,271	4.98%	133	\$ 985,714
• Thomaston, GA:	\$1,054	6.76%	54	\$ 522,222
• Thomasville, GA:	\$1,175	6.56%	87	\$ 603,448
• Thomasville-Lexington, NC:	\$ 930	5.41%	230	\$ 657,391
• Tiffin, OH:	\$1,302	6.68%	115	\$ 635,652
• Tifton, GA:	\$1,921	10.79%	96	\$ 861,458

• Toccoa, GA:	\$1,121	5.21%	43	\$ 669,767
• Toledo, OH:	\$1,952	8.56%	1,703	\$ 743,394
• Topeka, KS:	\$1,396	5.73%	468	\$ 702,564
• Torrington, CT:	\$1,096	3.18%	439	\$ 468,109
• Traverse City, MI:	\$2,032	7.67%	376	\$ 786,968
• Trenton-Ewing, NJ:	\$1,444	3.82%	986	\$ 538,438
• Troy, AL:	\$1,236	6.45%	61	\$ 667,213
• Truckee-Grass Valley, CA:	\$1,216	4.44%	246	\$ 486,178
• Tucson, AZ:	\$1,477	6.31%	1,799	\$ 821,289
• Tullahoma, TN:	\$1,139	5.78%	200	\$ 572,500
• Tulsa, OK:	\$1,512	6.46%	2,073	\$ 698,456
• Tupelo, MS:	\$1,349	7.08%	287	\$ 651,916
• Tuscaloosa, AL:	\$1,481	6.48%	425	\$ 780,705
• Tuskegee, AL:	\$ 609	3.58%	26	\$ 488,461
• Twin Falls, ID:	\$1,284	7.57%	211	\$ 620,379
• Tyler, TX:	\$1,521	6.31%	431	\$ 768,445
• Ukiah, CA:	\$1,265	6.59%	262	\$ 423,282
• Union, SC:	\$ 759	4.29%	46	\$ 467,391
• Union City, TN-KY:	\$1,050	5.10%	83	\$ 486,746
• Urbana, OH:	\$ 794	3.56%	55	\$ 569,090
• Utica-Rome, NY:	\$1,307	5.48%	719	\$ 540,611
• Uvalde, TX:	\$1,289	7.31%	67	\$ 513,432
• Valdosta, GA:	\$1,570	8.95%	308	\$ 741,883
• Vallejo-Fairfield, CA:	\$1,260	4.44%	842	\$ 626,484
• Valley, AL:	\$ 797	5.43%	60	\$ 446,666
• Van Wert, OH:	\$ 971	4.91%	48	\$ 575,000
• Vermillion, SD:	\$1,317	6.40%	34	\$ 552,941
• Vernal, UT:	\$1,022	5.30%	53	\$ 652,830
• Vernon, TX:	\$1,321	6.48%	35	\$ 500,000
• Vicksburg, MS:	\$1,052	4.85%	97	\$ 518,556
• Victoria, TX:	\$1,464	6.53%	286	\$ 600,000
• Vidalia, GA:	\$1,096	6.15%	78	\$ 515,384
• Vincennes, IN:	\$1,514	7.58%	86	\$ 679,069
• Vineland-Millville-Bridgeton, NJ:	\$1,051	4.78%	288	\$ 574,305
• Virginia Beach, VA-NC:	\$1,706	6.08%	3,862	\$ 749,067
• Visalia-Porterville, CA:	\$ 939	5.47%	700	\$ 615,142
• Wabash, IN:	\$1,255	7.56%	68	\$ 595,588
• Waco, TX:	\$1,668	8.18%	514	\$ 788,132
• Wahpeton, ND-MN:	\$1,370	5.83%	51	\$ 611,764
• Walla Walla, WA:	\$1,116	4.89%	128	\$ 525,000
• Walterboro, SC:	\$1,249	7.48%	69	\$ 692,753
• Wapakoneta, OH:	\$1,256	5.93%	98	\$ 585,714
• Warner Robins, GA:	\$1,512	5.96%	286	\$ 786,363
• Warren, PA:	\$1,171	5.05%	95	\$ 505,263

• Warrensburg, MO:	\$1,113	5.99%	92	\$ 658,695
• Warsaw, IN:	\$1,397	6.16%	171	\$ 631,578
• Washington, DC-VA-MD-WV:	\$1,529	3.45%	12,169	\$ 732,714
• Washington, IN:	\$1,221	6.02%	60	\$ 658,333
• Washington, NC:	\$1,101	5.09%	88	\$ 595,454
• Washington Court House, OH:	\$1,895	9.72%	62	\$ 883,870
• Waterloo-Cedar Falls, IA:	\$1,907	7.87%	390	\$ 825,384
• Watertown, SD:	\$1,887	7.69%	96	\$ 663,541
• Watertown-Fort Atkinson, WI:	\$1,388	6.23%	188	\$ 621,808
• Watertown-Fort Drum, NY:	\$1,439	6.68%	296	\$ 582,770
• Wauchula, FL:	\$ 542	4.72%	38	\$ 400,000
• Wausau, WI:	\$1,754	7.62%	362	\$ 653,038
• Waycross, GA:	\$1,194	6.49%	107	\$ 618,691
• Weatherford, OK:	\$1,486	6.53%	68	\$ 613,235
• Wenatchee, WA:	\$1,226	5.07%	256	\$ 546,875
• West Plains, MO:	\$1,296	7.03%	88	\$ 603,409
• West Point, MS:	\$ 850	4.59%	36	\$ 477,777
• Wheeling, WV-OH:	\$1,877	8.69%	398	\$ 689,698
• Whitewater, WI:	\$1,945	7.83%	293	\$ 688,737
• Wichita, KS:	\$1,680	7.45%	1,358	\$ 777,172
• Wichita Falls, TX:	\$1,646	8.58%	306	\$ 801,633
• Williamsport, PA:	\$1,509	7.43%	287	\$ 617,770
• Willimantic, CT:	\$1,072	3.91%	227	\$ 556,387
• Williston, ND:	\$1,312	4.31%	70	\$ 501,428
• Willmar, MN:	\$1,818	7.17%	77	\$ 993,506
• Wilmington, NC:	\$1,818	6.97%	997	\$ 690,070
• Wilmington, OH:	\$1,620	8.42%	84	\$ 805,952
• Wilson, NC:	\$1,432	7.71%	150	\$ 780,000
• Winchester, VA-WV:	\$1,591	6.31%	299	\$ 696,989
• Winfield, KS:	\$1,154	5.65%	70	\$ 597,142
• Winona, MN:	\$1,428	6.79%	108	\$ 677,777
• Winston-Salem, NC:	\$1,455	6.32%	982	\$ 721,792
• Woodward, OK:	\$1,347	5.62%	51	\$ 527,450
• Wooster, OH:	\$1,199	5.81%	185	\$ 743,243
• Worcester, MA:	\$1,365	4.45%	1,794	\$ 611,817
• Worthington, MN:	\$1,219	5.84%	43	\$ 606,976
• Yakima, WA:	\$1,074	5.60%	493	\$ 547,870
• Yankton, SD:	\$1,955	7.64%	64	\$ 696,875
• Yazoo City, MS:	\$ 527	4.11%	37	\$ 394,594
• York-Hanover, PA:	\$1,293	4.75%	824	\$ 688,834
• Youngstown-Warren, OH-PA:	\$1,672	8.31%	1,298	\$ 720,261
• Yuba City, CA:	\$ 939	4.69%	276	\$ 576,086
• Yuma, AZ:	\$ 991	5.74%	288	\$ 712,500
• Zanesville, OH:	\$1,689	8.81%	200	\$ 730,000

16.3 Market Resources

Restaurant Business, 1 Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181.
(630) 574-5075. (www.restaurantbusinessonline.com)

The Nielsen Company, 770 Broadway, New York, NY 10003. (646) 654-5000.
(www.nielsen.com)

MARKET GROWTH POTENTIAL

17.1 Overview

The Nielsen Company (www.nielsen.com) ranks Metropolitan Statistical Areas (MSAs) and Micropolitan Statistical Area (μSAs) for restaurant growth potential using a Restaurant Growth Index (RGI). The RGI identifies restaurant spending and gaps in spending per capita compared to a national average. (note: MSAs are defined in Section 16.1 of this handbook).

The RGI is calculated based on an area's total restaurant sales and sales as a percentage of per capita income, compared to the nation as a whole. The national average is 100. The higher the score over 100, the better the potential opportunities; scores below 100 may indicate poorer opportunities.

The RGI is calculated annually for 942 MSAs and μSAs by Nielsen; the data is published in *Restaurant Business*.

17.2 Growth Potential for MSAs

The 2013 Restaurant Growth Index for each MSA and μSA is as follows:

• Ocean Pines, MD:	732
• Findlay, OH:	623
• Liberal, KS:	565
• Boone, NC:	460
• Sevierville, TN:	441
• Jasper, IN:	409
• Branson, MO:	408
• Laurinburg, NC:	391
• Kill Devil Hills, NC:	361
• Myrtle Beach, SC:	343
• Baraboo, WI:	335
• Dothan, AL:	334
• Nacogdoches, TX:	331
• Flagstaff, AZ:	325
• Atlantic City-Hammonton, NJ:	315
• Santa Rosa-Petaluma, CA:	314
• Mount Pleasant, MI:	302
• Gulfport-Biloxi, MS:	298

• Brookings, SD:	285
• Stillwater, OK:	284
• Athens, OH:	271
• Effingham, IL:	256
• Bowling Green, KY:	243
• Tifton, GA:	240
• Silverthorne, CO:	238
• Panama City-Lynn Haven, FL:	234
• Ocean City, NJ:	232
• Marshall, MN:	230
• Richmond, IN:	229
• Maryville, MO:	227
• Key West, FL:	226
• Fargo, ND-MN:	224
• Ashland, OH:	222
• Kokomo, IN:	222
• Washington Court House, OH:	222
• Lafayette, IN:	217
• Ames, IA:	217
• Statesboro, GA:	212
• Owensboro, KY:	212
• Muncie, IN:	206
• Edwards, CO:	205
• Jackson, WY-ID:	202
• Columbus, IN:	200
• Hattiesburg, MS:	196
• Murray, KY:	195
• Decatur, IL:	195
• Orlando-Kissimmee-Sanford, FL:	194
• Burlington, NC:	194
• Lima, OH:	193
• Crestview, FL:	193
• Macomb, IL:	192
• Grand Junction, CO:	192
• Mitchell, SD:	191
• Mount Vernon, IL:	190
• Sioux City, IA-NE-SD:	189
• Arkadelphia, AR:	186
• Bloomington, IN:	186
• Grand Rapids-Wyoming, MI:	185
• Athens-Clarke County, GA:	185
• Gaffney, SC:	184
• Jackson, MI:	184
• Willmar, MN:	184

• Las Vegas-Paradise, NV:	184
• Kahului-Wailuku, HI:	183
• Fort Wayne, IN:	183
• Spirit Lake, IA:	182
• Mansfield, OH:	182
• Saginaw, MI:	181
• Laredo, TX:	181
• Charleston-Mattoon, IL:	181
• Lexington-Fayette, KY:	180
• Bay City, MI:	180
• Rapid City, SD:	180
• Carbondale, IL:	179
• Starkville, MS:	178
• Wichita Falls, TX:	177
• Pittsburg, KS:	177
• Louisville, KY-IN:	177
• Huntsville, TX:	176
• Middlesborough, KY:	176
• Lewisburg, PA:	176
• Wilmington, OH:	175
• Sioux Falls, SD:	174
• Flint, MI:	174
• Springfield, MO:	174
• Laurel, MS:	173
• Oxford, MS:	173
• Lubbock, TX:	173
• Valdosta, GA:	171
• Cheyenne, WY:	170
• Jackson, TN:	170
• Kapaa, HI:	169
• Missoula, MT:	169
• Mankato-North Mankato, MN:	169
• Grand Forks, ND-MN:	169
• Anniston-Oxford, AL:	169
• Waterloo-Cedar Falls, IA:	168
• Cordele, GA:	167
• Dayton, OH:	167
• Hays, KS:	167
• Champaign-Urbana, IL:	167
• Elkhart-Goshen, IN:	167
• Gallup, NM:	167
• Evansville, IN-KY:	166
• Waco, TX:	166
• Zanesville, OH:	166

• Sumter, SC:	165
• Iowa City, IA:	165
• Toledo, OH:	164
• Paducah, KY-IL:	164
• Lawrence, KS:	164
• London, KY:	164
• Gainesville, TX:	163
• Lawton, OK:	163
• Jacksonville, NC:	163
• Marion, IN:	162
• Columbia, MO:	162
• Hilton Head Island-Beaufort, SC:	160
• Kalamazoo-Portage, MI:	159
• Dubuque, IA:	159
• La Crosse, WI-MN:	159
• Plymouth, IN:	158
• Laconia, NH:	158
• Muskegon-Norton Shores, MI:	157
• Chillicothe, OH:	157
• New Ulm, MN:	156
• Traverse City, MI:	156
• Knoxville, TN:	156
• Indianapolis-Carmel, IN:	155
• State College, PA:	155
• Wilson, NC:	155
• Altoona, PA:	155
• College Station-Bryan, TX:	155
• Wheeling, WV-OH:	155
• Owatonna, MN:	155
• Joplin, MO:	155
• Youngstown-Warren, OH-PA:	155
• Huntington-Ashland, WV-KY-OH:	154
• Brownsville-Harlingen, TX:	154
• Mason City, IA:	154
• Aberdeen, SD:	153
• Selinsgrove, PA:	153
• Greensboro-High Point, NC:	153
• Anderson, IN:	153
• Decatur, IN:	153
• Monroe, LA:	153
• Savannah, GA:	152
• El Paso, TX:	152
• Henderson, NC:	151
• Elmira, NY:	151

• Billings, MT:	151
• Lincoln, NE:	150
• Michigan City-La Porte, IN:	150
• Brunswick, GA:	150
• Fond du Lac, WI:	150
• Kirksville, MO:	150
• Wichita, KS:	149
• Odessa, TX:	149
• Tallahassee, FL:	149
• St. Cloud, MN:	149
• Lansing-East Lansing, MI:	149
• Orangeburg, SC:	149
• Rome, GA:	149
• Norfolk, NE:	149
• Terre Haute, IN:	149
• Elizabethtown, KY:	148
• Rolla, MO:	148
• Springfield, OH:	148
• Florence, SC:	148
• Bloomington-Normal, IL:	148
• Spearfish, SD:	148
• Bismarck, ND:	148
• Morehead City, NC:	148
• Sedalia, MO:	146
• Cleveland, TN:	146
• Fremont, OH:	146
• Greenwood, SC:	146
• McAllen-Edinburg-Mission, TX:	146
• Jonesboro, AR:	146
• Albany, GA:	146
• Richmond-Berea, KY:	145
• Texarkana, TX-AR:	145
• Appleton, WI:	145
• Milledgeville, GA:	145
• Daphne-Fairhope, AL:	144
• Cape Girardeau-Jackson, MO-IL:	144
• Canton-Massillon, OH:	144
• Sandusky, OH:	143
• Barnstable Town, MA:	143
• Sheboygan, WI:	143
• Bozeman, MT:	143
• Amarillo, TX:	143
• Manhattan, KS:	143
• Greenville-Mauldin-Easley, SC:	143

• Gainesville, FL:	142
• Lafayette, LA:	142
• Newport, TN:	141
• Erie, PA:	141
• Beckley, WV:	141
• Gadsden, AL:	141
• Beaumont-Port Arthur, TX:	140
• Pensacola-Ferry Pass-Brent, FL:	140
• Johnson City, TN:	140
• San Angelo, TX:	140
• Stephenville, TX:	140
• Shawnee, OK:	140
• Bemidji, MN:	140
• Columbus, OH:	140
• Astoria, OR:	139
• Whitewater, WI:	139
• San Antonio-New Braunfels, TX:	139
• Greenville, NC:	139
• South Bend-Mishawaka, IN-MI:	139
• St. Joseph, MO-KS:	139
• Kearney, NE:	138
• Searcy, AR:	138
• Columbia, SC:	138
• Salisbury, NC:	138
• Yankton, SD:	137
• Marion-Herrin, IL:	137
• Pocatello, ID:	137
• Janesville, WI:	136
• Fort Dodge, IA:	136
• Omaha-Council Bluffs, NE-IA:	136
• Abilene, TX:	136
• Stevens Point, WI:	136
• Roswell, NM:	136
• Green Bay, WI:	136
• Salina, KS:	135
• Fairmont, MN:	135
• Seaford, DE:	135
• Oklahoma City, OK:	135
• Lake Charles, LA:	134
• Emporia, KS:	134
• Dickinson, ND:	134
• North Platte, NE:	134
• Tucson, AZ:	134
• Waltherboro, SC:	134

• Hot Springs, AR:	133
• Holland-Grand Haven, MI:	133
• Eau Claire, WI:	133
• Vincennes, IN:	133
• Rockford, IL:	133
• Great Falls, MT:	132
• Blacksburg, VA:	132
• Akron, OH:	132
• St. Louis, MO-IL:	132
• Danville, KY:	132
• Watertown, SD:	132
• Houghton, MI:	132
• Kingsport-Bristol-Bristol, TN-VA:	131
• Nashville-Davidson, TN:	131
• Kingsville, TX:	131
• Bedford, IN:	131
• Honolulu, HI:	131
• Fort Collins-Loveland, CO:	131
• Kodiak, AK:	131
• Minot, ND:	131
• Cedar City, UT:	131
• Tuscaloosa, AL:	131
• Parkersburg-Marietta-Vienna, WV-OH:	131
• Reno-Sparks, NV:	131
• Columbus, GA-AL:	131
• Asheville, NC:	130
• Santa Fe, NM:	130
• Idaho Falls, ID:	130
• Batavia, NY:	130
• Cookeville, TN:	130
• Lewiston-Auburn, ME:	130
• Duluth, MN-WI:	129
• Anderson, SC:	129
• Phoenix-Mesa-Glendale, AZ:	129
• Logan, UT-ID:	129
• Cincinnati-Middletown, OH-KY-IN:	129
• Davenport-Moline, IA-IL:	129
• Jacksonville, IL:	129
• Wausau, WI:	129
• Shreveport-Bossier City, LA:	128
• Corpus Christi, TX:	128
• Hickory-Lenoir-Morganton, NC:	128
• Lake City, FL:	128
• Kankakee-Bradley, IL:	128

• Kalispell, MT:	128
• Little Rock, AR:	128
• Easton, MD:	127
• Cleveland-Elyria-Mentor, OH:	127
• Angola, IN:	127
• Salt Lake City, UT:	127
• Spartanburg, SC:	127
• Statesville-Mooresville, NC:	127
• Alexandria, MN:	127
• Rocky Mount, NC:	127
• The Villages, FL:	127
• Cape Coral-Fort Myers, FL:	126
• Bangor, ME:	126
• Portland, ME:	126
• Oshkosh-Neenah, WI:	126
• Eagle Pass, TX:	125
• Provo-Orem, UT:	125
• Tyler, TX:	125
• Madison, WI:	125
• Cumberland, MD-WV:	125
• Buffalo-Niagara Falls, NY:	125
• Chattanooga, TN-GA:	125
• Clarksville, TN-KY:	125
• Ottumwa, IA:	124
• Roanoke, VA:	124
• Wilmington, NC:	124
• Moscow, ID:	124
• Scottsburg, IN:	124
• Cadillac, MI:	124
• Marion, OH:	124
• Columbia, TN:	124
• Ruston, LA:	123
• Columbus, NE:	123
• Lynchburg, VA:	123
• Brainerd, MN:	123
• Pueblo, CO:	123
• Dover, DE:	123
• Elk City, OK:	123
• Des Moines-West Des Moines, IA:	123
• Allegan, MI:	123
• Punta Gorda, FL:	122
• Detroit-Warren-Livonia, MI:	122
• Seymour, IN:	122
• Charleston, SC:	122

• Georgetown, SC:	122
• Ann Arbor, MI:	122
• Kansas City, MO-KS:	122
• Lake Havasu City-Kingman, AZ:	122
• Bluefield, WV-VA:	122
• Shelbyville, TN:	122
• Macon, GA:	121
• Twin Falls, ID:	121
• Florence-Muscle Shoals, AL:	121
• Minneapolis, MN-WI:	121
• Marquette, MI:	121
• Warner Robins, GA:	121
• Las Cruces, NM:	121
• Portsmouth, OH:	121
• Adrian, MI:	121
• New Orleans-Metairie-Kenner, LA:	121
• Monroe, MI:	120
• Mount Pleasant, TX:	120
• Sidney, OH:	120
• Ada, OK:	120
• Fayetteville, AR-MO:	120
• Danville, VA:	120
• Sheridan, WY:	120
• Battle Creek, MI:	120
• Cedartown, GA:	119
• Tupelo, MS:	119
• Longview, TX:	119
• Grand Island, NE:	119
• Winona, MN:	119
• Auburn-Opelika, AL:	119
• Tampa-St. Petersburg, FL:	119
• Jacksonville, FL:	119
• Williamsport, PA:	119
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• Charlotte-Gastonia, NC-SC:	118
• Lufkin, TX:	118
• Winston-Salem, NC:	118
• Virginia Beach, VA-NC:	118
• Maysville, KY:	117
• Salisbury, MD:	117
• Kinston, NC:	117
• Taos, NM:	117
• Harrisburg, IL:	117

• Mobile, AL:	117
• Daytona Beach, FL:	117
• Killeen-Temple-Fort Hood, TX:	117
• Memphis, TN-MS-AR:	117
• Milwaukee-Waukesha-W. Allis, WI:	117
• Tulsa, OK:	117
• Portales, NM:	116
• Glasgow, KY:	116
• St. George, UT:	116
• Wabash, IN:	116
• Laramie, WY:	116
• Jacksonville, TX:	116
• Harrisonburg, VA:	116
• Jackson, MS:	116
• Burlington, IA-IL:	116
• Hutchinson, KS:	116
• Providence, RI-MA:	115
• Bend, OR:	115
• Muskogee, OK:	115
• Lebanon, MO:	115
• Pella, IA:	115
• Freeport, IL:	115
• Crawfordsville, IN:	115
• Elizabeth City, NC:	115
• Springfield, IL:	114
• Frankfort, KY:	114
• Morgantown, WV:	114
• Dublin, GA:	114
• Butte-Silver Bow, MT:	114
• Albert Lea, MN:	114
• Winchester, VA-WV:	114
• Rochester, MN:	114
• Hilo, HI:	113
• North Port-Bradenton, FL:	113
• Sterling, CO:	113
• Farmington, NM:	113
• Augusta-Richmond County, GA-SC:	113
• Auburn, IN:	113
• Dalton, GA:	113
• Atlanta-Sandy Springs, GA:	113
• Albuquerque, NM:	113
• Casper, WY:	113
• Russellville, AR:	113
• Del Rio, TX:	113

• Boise City-Nampa, ID:	112
• Sebring, FL:	112
• Dodge City, KS:	112
• Hastings, NE:	112
• East Liverpool-Salem, OH:	112
• Raleigh-Cary, NC:	112
• Coeur d'Alene, ID:	112
• Poplar Bluff, MO:	112
• Peoria, IL:	111
• Wooster, OH:	111
• Jamestown-Dunkirk-Fredonia, NY:	111
• Troy, AL:	111
• Goldsboro, NC:	111
• Alpena, MI:	110
• Montgomery, AL:	110
• Dallas-Fort Worth-Arlington, TX:	110
• Sault Ste. Marie, MI:	110
• Havre, MT:	110
• Charleston, WV:	110
• Menomonie, WI:	110
• Garden City, KS:	110
• Tiffin, OH:	110
• Clarksburg, WV:	110
• West Plains, MO:	110
• Jamestown, ND:	109
• Clovis, NM:	109
• Pittsburgh, PA:	109
• Durham-Chapel Hill, NC:	109
• Enid, OK:	108
• Chico, CA:	108
• Bloomsburg-Berwick, PA:	108
• Augusta-Waterville, ME:	108
• Boulder, CO:	108
• Bucyrus, OH:	108
• Madisonville, KY:	108
• Richmond, VA:	108
• Farmington, MO:	107
• Pierre, SD:	107
• Atchison, KS:	107
• Okeechobee, FL:	106
• Columbus, MS:	106
• Indiana, PA:	106
• Defiance, OH:	106
• Yuma, AZ:	106

• Austin-Round Rock-San Marcos, TX:	105
• Niles-Benton Harbor, MI:	105
• Somerset, KY:	105
• New Philadelphia-Dover, OH:	105
• New Bern, NC:	105
• Lancaster, PA:	105
• Hood River, OR:	105
• Quincy, IL-MO:	105
• Sherman-Denison, TX:	105
• Hammond, LA:	105
• Prescott, AZ:	105
• Batesville, AR:	104
• Grenada, MS:	104
• LaGrange, GA:	104
• Topeka, KS:	104
• Huntsville, AL:	104
• Hutchinson, MN:	104
• DuBois, PA:	104
• Decatur, AL:	104
• Baton Rouge, LA:	104
• Waycross, GA:	104
• Miami-Fort Lauderdale, FL:	104
• Harrisburg-Carlisle, PA:	104
• Spokane, WA:	103
• Palm Bay-Melbourne, FL:	103
• Fort Smith, AR-OK:	103
• Weatherford, OK:	103
• Lumberton, NC:	103
• Plattsburgh, NY:	103
• Scottsbluff, NE:	103
• Syracuse, NY:	103
• Washington, IN:	102
• Thomasville, GA:	102
• Colorado Springs, CO:	102
• Warrensburg, MO:	102
• Fort Payne, AL:	102
• Birmingham, AL:	102
• Scranton-Wilkes-Barre, PA:	102
• Galesburg, IL:	101
• Mount Airy, NC:	101
• Victoria, TX:	101
• Celina, OH:	101
• Crossville, TN:	101
• Pittsfield, MA:	101

• Ocala, FL:	101
• Cullman, AL:	101
• St. Marys, GA:	101
• Warsaw, IN:	101
• Watertown-Fort Drum, NY:	101
• Denver-Aurora-Broomfield, CO:	100
• Meridian, MS:	100
• Campbellsville, KY:	100
• Durango, CO:	100
• Staunton-Waynesboro, VA:	100
• Watertown-Fort Atkinson, WI:	100
• Mount Vernon, OH:	100
• Oak Hill, WV:	100
• Alexandria, LA:	100
• Racine, WI:	99
• Modesto, CA:	99
• Cedar Rapids, IA:	99
• Marshalltown, IA:	99
• Salinas, CA:	99
• Cambridge, OH:	99
• Naples-Marco Island, FL:	99
• Bennington, VT:	99
• Springfield, MA:	99
• Natchitoches, LA:	99
• Eugene-Springfield, OR:	99
• Norwalk, OH:	98
• Ponca City, OK:	98
• Greenville, MS:	98
• Montrose, CO:	98
• Greeley, CO:	98
• Helena, MT:	98
• Hagerstown-Martinsburg, MD-WV:	98
• Fredericksburg, TX:	98
• Ashtabula, OH:	98
• Corbin, KY:	98
• Alma, MI:	97
• Uvalde, TX:	97
• Athens, TN:	97
• Dyersburg, TN:	97
• Corsicana, TX:	96
• Rochester, NY:	96
• Roanoke Rapids, NC:	96
• Danville, IL:	96
• Coffeyville, KS:	96

• Lakeland-Winter Haven, FL:	96
• Lewiston, ID-WA:	96
• Brigham City, UT:	96
• Oskaloosa, IA:	96
• Newton, IA:	96
• Fremont, NE:	95
• Payson, AZ:	95
• Gainesville, GA:	95
• Central City, KY:	95
• Chicago, IL-IN-WI:	95
• Portland-Vancouver, OR-WA:	95
• Natchez, MS-LA:	95
• Marshall, MO:	94
• Shelby, NC:	94
• Medford, OR:	94
• Riverside, CA:	94
• Gardnerville Ranchos, NV:	94
• Ellensburg, WA:	94
• Midland, MI:	93
• Keene, NH:	93
• Escanaba, MI:	93
• Ardmore, OK:	93
• Houma-Bayou Cane-Thibodaux, LA:	93
• Ithaca, NY:	93
• Houston-Sugar Land-Baytown, TX:	93
• Morristown, TN:	93
• Pullman, WA:	93
• Huntington, IN:	93
• Albemarle, NC:	93
• Glens Falls, NY:	93
• Tallulah, LA:	92
• The Dalles, OR:	92
• Marinette, WI-MI:	92
• Borger, TX:	92
• Wahpeton, ND-MN:	92
• Burlington-South Burlington, VT:	92
• Ogden-Clearfield, UT:	92
• Thomasville-Lexington, NC:	92
• Brenham, TX:	92
• McPherson, KS:	92
• Greensburg, IN:	91
• Worthington, MN:	91
• Coldwater, MI:	91
• Vermillion, SD:	91

• Thomaston, GA:	91
• Binghamton, NY:	91
• Red Wing, MN:	90
• Spencer, IA:	90
• Toccoa, GA:	90
• Greeneville, TN:	90
• Wapakoneta, OH:	90
• Lexington, NE:	89
• Dillon, SC:	89
• Vernal, UT:	89
• Corinth, MS:	89
• Sikeston, MO:	89
• Albertville, AL:	89
• Rockingham, NC:	89
• Storm Lake, IA:	89
• Napa, CA:	89
• Sanford, NC:	89
• Brookhaven, MS:	89
• Madison, IN:	89
• Concord, NH:	89
• Altus, OK:	88
• El Campo, TX:	88
• Port St. Lucie, FL:	88
• San Luis Obispo-Paso Robles, CA:	88
• Pine Bluff, AR:	88
• Corvallis, OR:	88
• Huron, SD:	88
• Beatrice, NE:	87
• Peru, IN:	87
• Winfield, KS:	87
• San Diego-Carlsbad, CA:	87
• Redding, CA:	87
• Bellefontaine, OH:	87
• Visalia-Porterville, CA:	87
• Platteville, WI:	87
• Deming, NM:	87
• Midland, TX:	86
• Paragould, AR:	86
• Durant, OK:	86
• Big Rapids, MI:	86
• Los Angeles-Long Beach, CA:	86
• Coshocton, OH:	86
• Price, UT:	86
• Fresno, CA:	86

• Tullahoma, TN:	86
• Steubenville-Weirton, OH-WV:	85
• Pascagoula, MS:	85
• Mount Vernon-Anacortes, WA:	85
• Ruidoso, NM:	85
• New Castle, IN:	85
• Athens, TX:	85
• La Grande, OR:	85
• McAlester, OK:	85
• Santa Cruz-Watsonville, CA:	85
• Bakersfield-Delano, CA:	84
• York-Hanover, PA:	84
• Sulphur Springs, TX:	84
• Cornelia, GA:	84
• Fort Valley, GA:	84
• Olean, NY:	84
• Jefferson City, MO:	84
• Vernon, TX:	84
• Boston-Cambridge-Quincy, MA-NH:	84
• Pecos, TX:	83
• Cortland, NY:	83
• Faribault-Northfield, MN:	83
• Alamogordo, NM:	83
• Carson City, NV:	83
• Rutland, VT:	83
• Johnstown, PA:	83
• Sierra Vista-Douglas, AZ:	83
• Mount Sterling, KY:	83
• Frankfort, IN:	82
• Merced, CA:	82
• Muscatine, IA:	82
• Albany-Schenectady-Troy, NY:	82
• Manitowoc, WI:	82
• Vidalia, GA:	82
• Hannibal, MO:	82
• Fort Leonard Wood, MO:	82
• Sacramento-Arden, CA:	82
• Grants Pass, OR:	82
• Great Bend, KS:	82
• Kennewick-Pasco-Richland, WA:	81
• Mountain Home, AR:	81
• Helena-West Helena, AR:	81
• Olympia, WA:	81
• New Castle, PA:	81

• Baltimore-Towson, MD:	81
• McComb, MS:	81
• Martin, TN:	81
• Cleveland, MS:	81
• Calhoun, GA:	81
• Clearlake, CA:	80
• Manchester-Nashua, NH:	80
• Austin, MN:	80
• Jesup, GA:	80
• Iron Mountain, MI-WI:	80
• Grants, NM:	80
• Plainview, TX:	79
• Jennings, LA:	79
• Yakima, WA:	79
• Greenwood, MS:	79
• Charlottesville, VA:	79
• Salem, OR:	79
• Rio Grande City-Roma, TX:	79
• Chambersburg, PA:	79
• Rockland, ME:	79
• Southern Pines-Pinehurst, NC:	79
• Norwich-New London, CT:	79
• Auburn, NY:	78
• Washington, NC:	78
• Oil City, PA:	78
• El Centro, CA:	78
• Lebanon, NH-VT:	78
• Harrison, AR:	78
• Bartlesville, OK:	78
• North Wilkesboro, NC:	77
• Kendallville, IN:	77
• Homosassa Springs, FL:	77
• Ottawa-Streator, IL:	77
• Meadville, PA:	77
• McMinnville, TN:	77
• Albany-Lebanon, OR:	77
• Palm Coast, FL:	77
• Sebastian-Vero Beach, FL:	77
• Woodward, OK:	77
• Utica-Rome, NY:	77
• Burley, ID:	76
• Carlsbad-Artesia, NM:	76
• Centralia, WA:	76
• Klamath Falls, OR:	76

• Roseburg, OR:	76
• New Iberia, LA:	76
• Forest City, NC:	76
• Seneca Falls, NY:	76
• Clarksdale, MS:	76
• Martinsville, VA:	75
• Clinton, IA:	75
• Moberly, MO:	75
• Philadelphia, PA-NJ-DE-MD:	75
• Americus, GA:	75
• Fergus Falls, MN:	75
• East Stroudsburg, PA:	75
• Silver City, NM:	75
• Hinesville-Fort Stewart, GA:	75
• Logansport, IN:	75
• Prineville, OR:	75
• Hobbs, NM:	75
• Evanston, WY:	74
• Sturgis, MI:	74
• Ontario, OR-ID:	74
• Gillette, WY:	74
• Alice, TX:	74
• Fort Madison-Keokuk, IA-MO:	74
• Greenville, OH:	74
• Forrest City, AR:	74
• Nogales, AZ:	74
• Big Spring, TX:	74
• Talladega, AL:	73
• Seattle-Tacoma-Bellevue, WA:	73
• Santa Barbara, CA:	73
• Van Wert, OH:	73
• Sterling, IL:	73
• Bainbridge, GA:	73
• Las Vegas, NM:	72
• Reading, PA:	72
• Blytheville, AR:	72
• Ukiah, CA:	72
• Pahrump, NV:	72
• Vallejo-Fairfield, CA:	72
• Marshall, TX:	72
• Stockton, CA:	72
• Wenatchee-East Wenatchee, WA:	72
• Mineral Wells, TX:	71
• Longview, WA:	71

• Vineland-Millville-Bridgeton, NJ:	71
• Rock Springs, WY:	71
• Beeville, TX:	71
• Connersville, IN:	70
• Worcester, MA:	70
• Kennett, MO:	70
• Yuba City, CA:	70
• Fairbanks, AK:	70
• Owosso, MI:	70
• Eufaula, AL-GA:	70
• Parsons, KS:	70
• Bellingham, WA:	69
• Pontiac, IL:	69
• Brownwood, TX:	69
• Lewistown, PA:	69
• Marshfield-Wisconsin Rapids, WI:	69
• Anchorage, AK:	68
• Cambridge, MD:	68
• Fairmont, WV:	68
• Riverton, WY:	68
• Hartford-West Hartford, CT:	68
• Selma, AL:	68
• Monroe, WI:	68
• Gettysburg, PA:	68
• Crescent City, CA:	68
• Brookings, OR:	67
• Eureka-Arcata-Fortuna, CA:	67
• Barre, VT:	67
• Oxnard-Thousand Oaks-Ventura, CA:	67
• Morgan City, LA:	67
• Somerset, PA:	67
• Canton, IL:	67
• Bishop, CA:	67
• Allentown-Bethlehem, PA-NJ:	66
• Walla Walla, WA:	66
• Canon City, CO:	66
• La Follette, TN:	66
• Fort Polk South, LA:	66
• Palatka, FL:	66
• Warren, PA:	66
• Clewiston, FL:	66
• St. Marys, PA:	65
• Washington, DC-VA-MD-WV:	65
• Kerrville, TX:	65

• Vicksburg, MS:	65
• Lamesa, TX:	65
• Scottsboro, AL:	65
• Lock Haven, PA:	65
• Show Low, AZ:	64
• Union City, TN-KY:	64
• Paris, TX:	64
• Bastrop, LA:	64
• Enterprise-Ozark, AL:	64
• Elko, NV:	64
• Pendleton-Hermiston, OR:	64
• Lincoln, IL:	63
• Safford, AZ:	63
• Lawrenceburg, TN:	63
• Dunn, NC:	63
• Granbury, TX:	63
• Crowley, LA:	63
• Rochelle, IL:	63
• Palestine, TX:	63
• Opelousas-Eunice, LA:	63
• Humboldt, TN:	63
• Valley, AL:	63
• Heber, UT:	62
• Poughkeepsie-Newburgh, NY:	62
• Lebanon, PA:	62
• Bremerton-Silverdale, WA:	62
• Centralia, IL:	62
• Culpeper, VA:	62
• Red Bluff, CA:	62
• Mountain Home, ID:	61
• Raymondville, TX:	61
• Picayune, MS:	61
• Lincolnton, NC:	61
• Moultrie, GA:	61
• Tahlequah, OK:	61
• Hope, AR:	61
• Miami, OK:	61
• Paris, TN:	61
• Harriman, TN:	61
• Espanola, NM:	60
• Point Pleasant, WV-OH:	60
• Arcadia, FL:	60
• San Jose-Sunnyvale, CA:	60
• Chester, SC:	60

• Lancaster, SC:	59
• Hanford-Corcoran, CA:	58
• Guymon, OK:	57
• Oneonta, NY:	57
• Port Angeles, WA:	57
• New Haven-Milford, CT:	57
• Minden, LA:	57
• West Point, MS:	57
• Dumas, TX:	56
• Willimantic, CT:	56
• Williston, ND:	56
• Bay City, TX:	56
• Truckee-Grass Valley, CA:	56
• Huntingdon, PA:	56
• Amsterdam, NY:	55
• Brownsville, TN:	55
• Lewisburg, TN:	55
• Corning, NY:	55
• Phoenix Lake-Cedar Ridge, CA:	55
• Merrill, WI:	54
• Douglas, GA:	54
• Duncan, OK:	54
• Mexico, MO:	54
• San Francisco-Oakland, CA:	54
• Sweetwater, TX:	53
• Trenton-Ewing, NJ:	53
• Berlin, NH-VT:	53
• Urbana, OH:	52
• Taylorville, IL:	52
• Union, SC:	52
• Fort Morgan, CO:	51
• Moses Lake, WA:	51
• New York, NY-NJ-PA:	51
• Madera-Chowchilla, CA:	51
• Blackfoot, ID:	50
• Fallon, NV:	50
• Coos Bay, OR:	50
• Hereford, TX:	50
• Ketchikan, AK:	50
• Ogdensburg-Massena, NY:	49
• Beaver Dam, WI:	49
• North Vernon, IN:	49
• Alexander City, AL:	49
• Snyder, TX:	49

• Lexington Park, MD:	49
• Juneau, AK:	49
• Brevard, NC:	49
• El Dorado, AR:	49
• Wauchula, FL:	49
• Bogalusa, LA:	48
• Indianola, MS:	48
• Bradford, PA:	48
• Pampa, TX:	48
• Pottsville, PA:	47
• Marble Falls, TX:	47
• Gloversville, NY:	47
• Malone, NY:	47
• Dixon, IL:	47
• Aberdeen, WA:	46
• Magnolia, AR:	46
• Tuskegee, AL:	45
• Newberry, SC:	45
• Abbeville, LA:	45
• Boone, IA:	45
• Oak Harbor, WA:	43
• Sayre, PA:	43
• Seneca, SC:	42
• Yazoo City, MS:	42
• Kingston, NY:	42
• Fernley, NV:	42
• Fitzgerald, GA:	41
• Sunbury, PA:	41
• Camden, AR:	40
• Bennettsville, SC:	40
• Mayfield, KY:	39
• Torrington, CT:	38
• Bridgeport-Stamford-Norwalk, CT:	38
• Levelland, TX:	36
• Susanville, CA:	36
• Shelton, WA:	34
• Hudson, NY:	34
• DeRidder, LA:	33
• Summerville, GA:	32
• Andrews, TX:	31
• Bonham, TX:	30
• Claremont, NH:	28
• Los Alamos, NM:	28
• Pierre Part, LA:	9

17.3 Market Resources

Restaurant Business, 1 Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181.
(630) 574-5075. (www.restaurantbusinessonline.com)

The Nielsen Company, 770 Broadway, New York, NY 10003. (646) 654-5000.
(www.nielsen.com)

TOP MARKETS FOR QSR GROWTH

18.1 Top 40 Markets For Quick-Service Restaurant Expansion

According to QSR (February 2014), based on an assessment by The NPD Group (www.npd.com), the top 40 markets for quick-service restaurant expansion through 2018 are as follows:

	QSR Traffic Growth Forecast	QSR Units	Projected Population Change
Large Markets			
• Miami-Ft. Lauderdale, FL:	16%	4,203	10%
• Salt Lake City, UT:	12%	2,892	9%
• Washington, DC:	12%	6,599	10%
• Denver, CO:	11%	4,957	9%
• San Diego, CA:	10%	3,721	7%
• Phoenix, AZ:	10%	5,000	7%
• Charlotte, NC:	9%	3,030	6%
• Dallas-Ft. Worth, TX:	8%	8,459	11%
• Seattle-Tacoma, WA:	8%	6,005	7%
• Tampa-St. Petersburg-Sarasota, FL:	6%	4,222	6%
Medium Markets			
• Austin, TX:	18%	2,135	17%
• El Paso, TX:	11%	942	11%
• Fresno-Visalia, CA:	10%	1,775	7%
• Albuquerque-Santa Fe, NM:	10%	1,837	5%
• Ft. Myers-Naples, FL:	10%	1,186	8%
• Waco-Temple-Bryan, TX:	10%	1,037	7%
• Harlingen-Brownsville-McAllen, TX:	9%	1,100	12%
• Tulsa, OK:	9%	1,591	4%
• Las Vegas, NV:	7%	2,439	4%
• Tucson-Nogales, AZ:	6%	1,067	4%
• Little Rock-Pine Bluff, AR:	6%	1,502	3%
• Buffalo, NY:	5%	1,590	-1%
• New Orleans, LA:	5%	1,783	7%
• Des Moines-Ames, IA:	4%	1,009	4%
• Jacksonville-Brunswick, FL:	4%	1,908	4%

Small Markets

• Palm Springs, CA:	16%	442	11%
• Yuma-El Centro, AZ-CA:	15%	294	7%
• Wilmington, NC:	15%	492	7%
• Odessa-Midland, TX:	15%	444	9%
• Helena, MT:	14%	76	7%
• Charleston, SC:	12%	867	10%
• Butte-Bozeman, MT:	12%	201	6%
• Laredo, TX:	11%	246	12%
• Santa Barbara-San Luis Obispo, CA:	11%	866	4%
• Rochester-Mason City-Austin, MN-IA:	10%	320	2%
• Minot-Bismarck-Dickinson, ND:	10%	305	13%
• Bakersfield, CA:	10%	756	7%
• Charlottesville, VA:	10%	221	5%
• Lafayette, IN:	9%	186	5%
• Yakima-Pasco-Richland, WA:	9%	670	11%

18.2 Market Resources

QSR: The Magazine of Quick Service Restaurant Success, 4905 Pine Cone Drive, Suite 2, Durham, NC 27727. (800) 662-4834. (www.qsrmagazine.com)

PART V: MARKET SEGMENTS

CASUAL-DINING RESTAURANTS

19.1 Profile

Casual-dining restaurants offer full dinners with complete table service and alcoholic beverages are available at most. Casual-dining restaurants are sometimes referred to as dinnerhouses.

The NPD Group (www.npd.com) estimates there are approximately 168,000 casual-dining restaurants in the United States.

According to *2013 Chain Restaurant Operators*, published by Chain Store Guide (www.chainstoreguide.com), there are 35,948 casual-dining chain restaurants in the United States.

19.2 Segment Trends

Few consumer business segments were hit harder by the recent economic woes than casual-dining restaurants. The segment began to recover in 2012 and 2013. *Nation's Restaurant News* (June 2013) reported that systemwide sales among the 27 largest casual-dining chains increased 3.4% compared with a year prior. But the segment has still not restored sales to pre-recession levels.

“Despite that modest increase, casual-dining growth has continued to trail that of the upscale and fast-casual categories over the past three years.”

Nation's Restaurant News, 6/24/13

Casual-dining chains strived to maintain sales throughout the recession with menu price cuts and a stream of continuous promotions. As the economy improved and commodity prices rose, some chains increased price points in an effort to improve

margins.

Some chain locations are beginning to take on local personality, with menu items sourced from local farms, regional cuisine, and chefs who are being allowed to vary from corporate-directed menus with daily features.

There is a new emphasis on the lunch market. Some chains have revamped their noonday menu to compete with fast-casual and quick-service restaurants.

“The midday meal has been turned upside down when it comes to price, as casual operators drop the cost of their offerings below that of the fast-casual concepts that have long been eating their lunch. The flip-flop spotlights the fever pitch that competition for midday dollars has reached as casual-dining chains try to lure back the customers who fled their dining rooms during the recession by reworking everything from price and ambience to service style.”

Nation's Restaurant News, 11/18/13

In a 2013 survey by the National Restaurant Association (www.restaurant.org), 47% of casual-dining operators assessed business conditions for their restaurant as good or excellent. Thirty-seven percent (37%) anticipate increased sales in 2014; 8% anticipate a drop in sales.

19.3 Upscale-Casual

Upscale-casual – also called polished-casual and casual-plus – has emerged as a rapidly growing sub-segment of the casual-dining market. Average checks at polished-casual restaurants are in the \$20 to \$50 range, while those at mass-market casual brands are typically between \$12 and \$20. Between 2009 and 2013, polished-casual chains experienced a sales growth of 3.7%, while lower-priced brands saw sales increase 0.7%, according to Technomic.

Upscale-casual chains include Brio, Cheddar's, Joe's Crab Shack, and Yard House. Each of these chains are experiencing annual sales growth of 17% or more, according to Technomic.

“The success of restaurants at the higher end of the casual-dining segment reflect a change in the way consumers are treating full-service restaurants. These days, consumers seeking alternatives are more likely to visit a fast-casual restaurant or simply pick up a rotisserie chicken at the supermarket. With dining out becoming more of a special occasion than a common occurrence, consumers are upgrading their choices a bit and going to restaurants at the high end of casual-dining. Casual-plus chains also are benefitting from a shift in business entertaining – dining out with clients.”

Robert Hardy, Founding Partner
Bellwether Food Group
Nation's Restaurant News, 7/22/13

CATERING & BANQUETS

20.1 Market Assessment

The National Restaurant Association (www.restaurant.org) forecasts social caterers' sales at \$8.67 billion for 2014, a 5.0% increase over 2013. For comparison, the overall commercial restaurant sector is projected to grow 3.6% in 2013. Growth in the catering segment was more than double that of the overall commercial restaurant industry in 2013, with a 2.6% increase compared with 1.2% growth for all restaurant segments.

Including hotel and on-premise banquets and other types of catering, the segment generates an estimated \$15 billion, according to the association.

With a broader definition of the market, Technomic (www.technomic.com) pegs the catering market at \$43.4 billion. There are two segments of the catering market, as follows:

- Consumer catering: \$27.5 billion
- Business-to-business: \$15.9 billion

There are approximately 53,000 caterers in the United States, excluding hotels, according to *Catersource*.

20.2 Restaurants In The Catering Market

According to the National Restaurant Association, half of family- and casual-dining operators, two-thirds of fine-dining operators, and 70% of quick-service restaurants offer off-premise catering.

Restaurant catering sales are \$16.7 billion, or 38% of the total catering market, according to Technomic. (The balance of the market is shared by caterers, supermarkets, warehouse clubs, and other retailers.) Restaurants garner 43% of the business-to-business catering market, or \$6.8 billion. They hold 36% of the consumer-catering market, or \$9.9 billion.

“Catering is on fire right now. Part of it is that the economy is improving and businesses are ordering, but social catering is expanding as well. Business is robust.”

Diana Hovey, CMO
Corner Bakery
Nation's Restaurant News, 12/16/13

Corner Bakery derives about 20% of revenue from catering; each location has at least two catering trucks and one unit has eight. Catering accounts for 8% of sales at Panera Bread Co. Other chains are just now entering the catering market, and sales are only a small but growing part of revenue. Chipotle, for example, ramped up its catering offerings during the 2013 winter holiday season. Prior to this initiative, catering accounted for about 1% of sales at locations that offered catering, according to Monty Moran, co-CEO at Chipotle.

Technomic projects catering to increase at a compound average growth rate (CAGR) of 12% through 2016 for fast-casual chains. Quick-service sandwich chains are forecast to experience an 8% CAGR.

“Fast-casual chains are leading growth in the catering category, which has increased significantly since the recession. Even as pinched consumers slashed their restaurant spending, they invested more in catering. Almost a third of consumers now cater through fast-casual chains.”

Advertising Age, 4/22/13

Another growing part of the catering business is the restaurant banquet business, also known as private dining, which has attracted several major chains as well as multi-concept operators and fine-dining independents. One example is

Buckhead Life Group (www.buckheadrestaurants.com), one of the largest fine-dining operators in Atlanta, which converted 103 West, one of its 9 restaurants, from fine-dining to private dining. The facility can accommodate parties from six to 600 and caters to business meetings and events, bar/bat mitzvahs, engagement parties and showers, rehearsal dinners, and wedding receptions. Fleming's Prime Steakhouse & Wine Bar (www.flemingssteakhouse.com), a 65-unit chain that is part of the Outback Steakhouse family, derives upward of 15% of sales from private parties.

20.3 Market Resources

National Association for Catering & Events, 9891 Broken Land Parkway, Suite 301, Columbia, MD 21046. (410) 290-5410. (www.nace.net)

21

COFFEESHOPS

21.1 Profile

According to *Coffee Shops Industry Profile*, published in February 2014 by First Research (www.firstresearch.com), there are approximately 20,000 coffeeshops in the United States. This count does not include coffee served at quick-service restaurants.

There are about 8,000 independent coffeeshops in the U.S.

According to The NPD Group (www.npd.com), six billion servings of coffee are sold at coffeeshops and quick-service restaurants each year. Brewed coffee accounts for about 55% of servings; specialty coffee and iced coffee account for 45%.

Estimates of annual revenue for the coffeeshop segment range from \$10 billion to \$15 billion.

21.2 Out-Of-Home Coffee Consumption

Coffee-drinking patterns appear to be regional. In the West, for example, 42% of people typically drink their coffee in coffeeshops, while only 28% of Southerners do so. According to Mintel (www.mintel.com), the following is where consumers, by region, prefer to get their coffee outside the home:

	Midwest	Northeast	South	West
• A diner or sit-down restaurant:	55%	42%	46%	47%
• A coffeeshop:	34%	41%	28%	42%
• A convenience shop:	26%	28%	27%	24%
• A fast-food chain:	23%	28%	22%	17%
• A bagel or donut shop:	18%	12%	21%	14%
• At work:	14%	8%	11%	14%

According to The NPD Group, the following cities/areas have the highest number of coffeeshops:

• Los Angeles/Long Beach, CA:	801
• Seattle/Bellevue/Everett, WA:	628
• Chicago, IL:	568
• New York, NY:	525
• Portland, OR/Vancouver, WA:	419

21.3 Coffeeshop Chains

Starbucks, with over 11,000 locations, dominates the segment. Caribou Coffee and Peet's Coffee & Tea, with 527 and 199 locations in 2013, respectively, are the only other coffeeshop chains ranking among the 200 largest restaurant chains.

Starbucks plans to open 1,600 U.S. locations from 2013 through 2017.

In 2012, the second- and third-largest coffeeshop chains were acquired by Joh. A. Benckiser Group. Peet's Coffee & Tea was acquired in October for \$941 million and Caribou Coffee was acquired in December for \$340 million. Combined, the two chains operate about 700 stores.

Caribou Coffee, the second-largest chain in the segment, announced plans to close 80 locations in 2014. Another 88 locations will be rebranded to Peet's Coffee & Tea. The closings are described by the company as a "pruning before the blooming," and expansion plans are underway.

"The conversions will give Peet's a foothold in non-San Francisco markets, and we'll aggressively put our innovation engine on full throttle to really elevate our average unit volumes. We'll continue to open stores in our regions of influence: Minnesota, the Dakotas, Iowa, Wisconsin, and Denver."

Alfredo Martel, Senior V.P.
Caribou Coffee
Nation's Restaurant News, 7/22/13

21.4 Segment Trends

A persistent challenge for coffeeshops is to expand business beyond the morning and early afternoon hours. Starbucks locations report 70% of business is before 2 p.m. Efforts to increase day-long consumption, which have included coffee served at varying temperatures and flavored with a wide range of ingredients, have been successful. The NPD Group reported that the number of coffee servings ordered in the afternoon at Starbucks are up 4.0%; orders for specialty coffees are up 4.6%.

In another effort to increase traffic later in the day, Starbucks added beer, wine, and food offerings to select stores in the Atlanta, Chicago, and Southern California markets. The food menu includes flatbreads, small plates, and snacks.

Among recently opened Starbucks locations, 60% include drive thrus.

“Drive thrus create incremental revenues and profits compared to traditional stores and represent a fast-growing and highly profitable format for Starbucks, comprising just over one-third of our U.S. company-operated stores but contributing nearly 45% of our U.S. retail profit. We are investing in this high-margin store format with innovations that will elevate the customer experience of our brand by enhancing drive-thru efficiency and consistency of service.”

Howard Schultz, Chairman and CEO
Starbucks Corp.
Portland Business Journal, 1/28/13

Caribou Coffee is also expanding its menu. Product innovation centers on its baked-foods platform, which includes grilled cheese sandwiches, breakfast sandwiches, and quiches.

COLLEGE CAMPUS DINING

22.1 Market Assessment

The National Restaurant Association (www.restaurant.org) projects the college and university foodservice market in 2014 at \$15.2 billion, a 2.5% increase over the previous year.

According to the *College Explorer Survey* by re:fuel (www.refuleagency.com), college students spent \$42 billion on food outside of dormitory foodservice during the 2012-2013 academic year.

22.2 Characteristics Of Campus Dining

College & University Consumer Trend Report, published in June 2013 by Technomic (www.technomic.com), provided the following perspective from college students on their dining experience:

- Sixty-nine percent (69%) of students purchase food and beverage from on-campus foodservice facilities at least once a week or more often.
- Just 35% of students overall say they are satisfied with their school's dining program.
- Fifty-seven percent (57%) of on-campus residents wish their school had grocery stores where they could shop using their meal plan.
- Sixty-six percent (66%) of students say they regularly explore new types of foods and flavors, an increase from 59% of students who said they did so in 2011.
- Fifty-three percent (53%) of students place high importance on the ability to substitute menu items; 50% like to add ingredients themselves.

The following are the most important menu attributes to students at on- and off-campus foodservice locations (percentage of respondents):

- Taste: 70%
- Variety of options: 53%
- Use of fresh ingredients: 50%
- Healthy options: 41%
- Ability to customize: 38%

22.3 Best Collegiate Dining

A 2013 study by The Daily Meal (www.thedailymeal.com) assessed campus dining at approximately 2,000 four-year colleges in the U.S. The assessment ranked the following as having the best collegiate dining:

1. Bowdoin College (Brunswick, ME)
2. Washington University (St. Louis, MO)
3. Virginia Tech (Blacksburg, VA)
4. Emory University (Atlanta, GA)
5. University of California Los Angeles (Los Angeles, CA)
6. Cornell University (Ithaca, NY)
7. University of Massachusetts (Amherst, MA)
8. Kennesaw State University (Kennesaw, GA)
9. Tufts University (Boston, MA)
10. Yale University (New Haven, CT)
11. St. Olaf College (Northfield, MN)
12. Northwestern University (Evanston, IL)
13. Gettysburg College (Gettysburg, PA)
14. Occidental College (Los Angeles, CA)
15. Grinnell College (Grinnell, IA)
16. University of California Berkeley (Berkeley, CA)
17. University of California Davis (Davis, CA)
18. Columbia University (New York, NY)
19. Princeton University (Princeton, NJ)
20. Stanford University (Stanford, CA)
21. Harvard University (Cambridge, MA)
22. Middlebury College (Middlebury, VT)
23. University of Georgia (Athens, GA)
24. James Madison University (Harrisonburg, VA)
25. Massachusetts Institute of Technology (Cambridge, MA)
26. Duke University (Durham, NC)
27. Wheaton College (Wheaton, IL)
28. University of Chicago (Chicago, IL)
29. Wesleyan University (Middletown, CT)
30. Carleton College (Northfield, MN)
31. Bryn Mawr College (Bryn Mawr, PA)
32. Bates College (Lewiston, ME)
33. University of Pennsylvania (Philadelphia, PA)
34. Vanderbilt University (Nashville, TN)
35. Purdue University (West Lafayette, IN)
36. Boston University (Boston, MA)
37. University of Delaware (Newark, DE)
38. Connecticut College (New London, CT)
39. College of the Atlantic (Bar Harbor, ME)
40. Colby College (Waterville, ME)

41. Pitzer College (Claremont, CA)
42. Johns Hopkins University (Baltimore, MD)
43. Mills College (Oakland, CA)
44. Brown University (Providence, RI)
45. University of California San Diego (San Diego, CA)
46. University of Connecticut (Storrs, CT)
47. Saint Anselm College (Manchester, NH)
48. Rollins College (Winter Park, FL)
49. Hamilton College (Clinton, NY)
50. St. Lawrence University (Canton, NY)
51. Arizona State University (Tempe, AZ)
52. Brigham Young University (Provo, UT)
53. Roger Williams University (Bristol, RI)
54. Scripps College (Claremont, CA)
55. Miami University (Oxford, OH)
56. Dartmouth College (Hanover, NH)
57. University of Richmond (Richmond, VA)
58. William & Mary (Williamsburg, VA)
59. Boston College (Boston, MA)
60. University of Washington (Seattle, WA)

22.4 Market Resources

The Daily Meal, 156 5th Avenue, Suite 400, New York, NY 10010.
(www.thedailymeal.com)

CONTRACT-MANAGED FOODSERVICE

23.1 Profile

The National Restaurant Association (www.restaurant.org) projects food and drink revenue for contract-managed foodservices at \$47.10 billion for 2014, a 3.4% increase over 2013. Distribution is as follows (change from previous year in parenthesis):

- Colleges and universities: \$15.20 billion (2.5%)
- Manufacturing and industrial plants: \$ 7.98 billion (4.5%)
- Primary and secondary schools: \$ 6.59 billion (3.8%)
- Recreation and sports centers: \$ 6.22 billion (3.2%)
- Hospitals and nursing homes: \$ 6.00 billion (5.4%)
- Commercial and office buildings: \$ 2.92 billion (3.1%)
- In-transit foodservice (airlines): \$ 2.20 billion (-0.3%)

This total does not include non-commercial restaurant services (i.e., businesses, governmental, or institutional organizations which operate their own restaurant services) or schools.

“Even though most of the focus in the foodservice industry is on major restaurant chains, the noncommercial sector is also a thriving realm for foodservice. Noncommercial operations account for 34% of total U.S. foodservice sales, garnering over \$200 billion in sales (retail sales equivalent).”

Technomic, 2/21/13

Technomic (www.technomic.com) defines the noncommercial segment as including colleges and universities, K-12 school districts, healthcare, retail meal

solutions, convenience stores, travel centers, lodging/hotels, recreation, travel, business and industry, military, corrections, daycare, group purchasing organizations, and foodservice management firms.

23.2 Segment Trends

Technomic assessed the strongest growth in 2013 in the healthcare (4.5%) and business & industry (4.0%) subsegments. As a whole, noncommercial foodservice operations grew 3.7%.

A survey by The NPD Group (www.npd.com) found that 51% of patrons dine at business and industry (B&I) foodservice cafeteria/restaurants primarily because of convenience. Just 4% said they visit because they like the restaurant, and only 2% said they visit for a specific menu item.

Some B&I foodservice operators have recently introduced menu innovations that are changing the image of the segment. Aramark, for example, partnered with *Cooking Light* to menu the magazine's latest recipes. Another example is Restaurant Associates, which introduced the rotation of offerings on a five-week cycle to avoid diner boredom. The company also launched Whole Sum, a themed food station where diners can enjoy a variety of complete meals containing fewer than 600 calories.

According to *Foodservice Director*, takeout comprises about 20% of foodservice operators' sales. Grab-and-go is most popular in hospitals (33%), at business and industrial sites (33%), and at colleges (22%) and least popular in nursing homes/long-term care (8%) and schools (6%).

CONVENIENCE STORE FOODSERVICE

24.1 Market Assessment

According to the National Association of Convenience Stores (NACS, www.nacsonline.com), there were 151,282 convenience stores (c-stores) in the United States at year-end 2013.

Annual sales at U.S. convenience stores for food prepared on site and hot dispensed beverages are approximately \$25 billion, according to the NACS. Packaged beverages and other in-store sales are excluded from this figure.

Sixty-five percent (65%) of all convenience stores offer food prepared onsite. One in 10 adults buy food at a c-store at some point within a two-week period; 55% of these purchases are a meal purchase.

The average store has \$356,000 a year in foodservice sales, distributed as follows.

• Prepared food:	\$227,000
• Coffee and other hot dispensed beverages:	\$ 62,000
• Cold dispensed beverages:	\$ 41,000
• Commissary packaged sandwiches:	\$ 21,000
• Frozen dispensed beverages:	\$ 5,000

A February 2014 assessment by Technomic (www.technomic.com) put annual convenience-store foodservice at \$10.9 billion.

24.2 Convenience Store Foodservice

Foodservice carries a gross margin of more than 55% for c-stores, according to the NACS.

According to The NPD Group (www.npd.com), foodservice purchases at c-stores are distributed as follows:

• Snacks:	41%
• Breakfast:	34%
• Lunch:	19%
• Other:	6%

The rise in convenience-store foodservice as well as that at other retailers has been at the expense of conventional restaurants. According to The NPD Group,

c-stores account for 22% of the snack market in the U.S., while fast-food chains account for 20%. Food-purchase occasions at convenience stores and supermarkets increased 29% between 2008 and 2013; visits to restaurants declined during that period.

“Convenience stores represent five times their fair share when it comes to grab-and-go snacking occasions, beating out grocery stores and even discount stores.”

The NPD Group, 7/24/13

An increasing number of high-volume c-stores, such as those located along interstate highways, franchise or license an established quick-service brand. Chester's Chicken, Pizza Pro, Quizno's, and Subway restaurants are frequently co-branded with c-stores.

24.3 Segment Trends

Market Intelligence Report: Convenience Stores, a February 2014 report by Technomic, provides the following assessment of c-store foodservice:

- Seventy-six percent (76%) of consumers who purchase prepared foods from convenience stores report that these locations provide a convenient option.
- Forty-percent (40%) of consumers say they would visit convenience stores for prepared foods more often if freshness and quality were improved.
- Convenience stores top other types of retail locations for breakfast patronage, and convenience stores are the only segment to see a significant increase in breakfast patronage over the past few years. This is driven by coffee purchases.
- Entrees account for more than half of c-store menu items, with their share of the menu expanding significantly to 51% in the second quarter of 2013 from 47% a year prior.

“Prepared food is a growth opportunity for convenience stores willing to raise the bar on quality and key attributes sought by today’s consumers. Consumers say they would visit convenience stores more often for prepared foods if those foodservice areas were improved upon. Customizing their offerings and a more appealing decor and atmosphere could enhance the experience.”

Donna Hood Crecca, Senior Director
Technomic, 2/12/14

FAMILY-DINING RESTAURANTS

25.1 Market Assessment

Family restaurants aim to appeal to customers of all ages by offering a relaxed atmosphere, low prices, and menus catering to both children's and adults' palates. Most do not serve alcoholic beverages, and those that do generally have limited selections. Family-dining restaurants are open for all dayparts – breakfast, lunch, and dinner – and many offer late-night hours.

According to Technomic (www.technomic.com), family-style restaurants account for \$33 billion in annual sales.

Sixteen (16) family-dining chains ranked among the 200 largest U.S. restaurant chains in 2013, according to *Nation's Restaurant News*. Their combined sales were \$12.91 billion; they operated 8,688 units.

While the segment's sales held up during the recession, there has been no growth.

Chains in the family-dining segment posted generally lackluster domestic sales and new-unit growth in the latest year. Overall, the segment's aggregate domestic systemwide sales figures have changed little from those reported back in 2009 during the depths of the recession."

Nation's Restaurant News, 6/24/13

In a 2013 survey by the National Restaurant Association (www.restaurant.org), 40% of family-dining operators assessed business conditions for their restaurant as good or excellent, the lowest among all full-service segments. Twenty-seven percent (27%) anticipate increased sales in 2014; 7% anticipate a drop in sales.

25.2 Overview

Technomic provides the following assessment of the family-dining segment:

- Sixty-eight percent (68%) of consumers say they would be highly likely to visit a family-style restaurant when they want an affordable sit-down meal, indicating that consumers think these locations may offer a better value proposition than other types of full-service restaurants.
- Family-dining patronage is relatively high, with 73% of consumers saying they visit at least once a month, and 38% doing so once a week or more.
- Reflecting a strong family-friendly ambiance, 68% of consumers say they would be likely or extremely likely to visit a family-dining restaurant when dining with children.
- Fifty-two percent (52%) of consumers say the availability of healthful food at family-style restaurants is very important.
- Fifty-one percent (51%) of consumers view family-style restaurants as the most suitable choice for breakfast.
- Appetizer sales at family-dining restaurants have done relatively well, outpacing salads, desserts, beverages, and soups, and equaling more than half of sandwich sales.
- The vast majority of revenues for family-dining come from on-premise dining. Takeout and catering represent very small shares of sales.

Several family chains have broadened children's menus and added more interactive entertainment elements, and many are providing children-friendly service. Customers from varying age groups and backgrounds are redefining family-dining's clientele, as chains court expanded demographics with updated decor, speedier service, bold menu items, and even alcoholic beverages.

“Chains within the family-dining category are attempting to combat the competition with menu overhauls and restaurant redesigns that are intended to spur sales growth.”

Nation's Restaurant News, 7/22/13

FAST-CASUAL RESTAURANTS

26.1 Market Assessment

Fast-casual dining, presently one of the hottest restaurant concepts, combines some of the best features of quick-service and casual-dining. Fast-casual restaurants are perceived by consumers to offer a slightly higher quality of food, service, and atmosphere. They continue to score high on customer satisfaction attributes.

According to *Top 150 Fast-Casual Chain Restaurant Report*, published in July 2013 by Technomic (www.technomic.com), fast-casual is a \$31 billion segment; sales increased 13% in 2012, the highest of any restaurant segment. Sales at the larger fast-casual chains increased by 16%.

According to The NPD Group (www.npd.com), there were 16,215 fast-casual chain units in the U.S. at year-end 2013, a 6% increase from the prior year.

While overall annual growth for limited-service restaurants is projected at 4.5% through 2017, Technomic forecasts 10.0% average annual growth for the fast-casual segment.

26.2 Market Leaders

According Technomic (July 2013), there are seven primary types of fast-casual restaurants. Annual sales and the market leader in each segment are as follows:

	Annual Sales	Market Leader
• Bakery cafe:	\$3.7 billion	Panera Bread
• Mexican:	\$2.7 billion	Chipotle Mexican Grill
• Asian/noodle:	\$1.8 billion	Panda Express
• Sandwich:	\$1.3 billion	Jimmy John's Gourmet Sandwich Shop
• Better burger:	\$1.1 billion	Five Guys Burgers and Fries
• Chicken:	\$ 979 million	Zaxby's
• Pizza:	\$ 157 million	Donatos Pizza

26.3 Market Trends

According to The NPD Group, visits to fast-casual restaurants increased 8% in 2013, the highest traffic growth among all restaurant segments. Guest checks at fast-casual restaurants, on average, were \$7.40 in 2013. For comparison, average checks were \$5.30 and \$13.66, respectively, in the quick-service and casual-dining segments.

According to Hudson Riehle, Senior Vice President of Research for the National Restaurant Association (www.restaurant.org), the fast-casual segment always does better than the rest of the industry because it's a hybrid – it combines the convenience of quick-service with the food offerings of higher-check establishments. Even in a recession, the demand for convenience continues.

An increasing number of fast-casual chains offer beer and wine service, blurring the line between fast-casual and casual-dining. Alcoholic beverage service appeals to many value-focused diners who have traded down from full-service venues. It also helps drive traffic at dinner, typically a more difficult daypart for many fast-casual chains.

The success of Chipotle Mexican Grill has been a market driver for the entire segment, spurring many new players into the fast-casual marketplace.

“Everyone wants to be the next Chipotle. We’re seeing fast-casual service systems applied to pizza, fish and chicken, Greek food, noodles, Asian food, hot dogs, and taquerias.”

Michael Whiteman, Chairman
Baum + Whiteman

26.4 Comparison of Quick-Service and Fast-Casual

According to a 2012 survey by The NPD Group, the primary reasons that customers choose fast-casual and quick-service restaurants are as follows:

	Fast-Casual	Quick-Service
• Healthful/light meal:	18%	9%
• Food value/quality:	17%	9%
• Price driven:	14%	23%
• Someone else chose:	13%	11%
• Treating myself:	12%	14%
• Personal loyalty:	8%	10%
• Restaurant explorer:	8%	5%
• Other reason:	10%	18%

According to *The Future of LSR: Fast-Foods & Fast-Casual Restaurants*, a 2012 report by Technomic, limited-service restaurants (LSRs) account for 53% of restaurant sales, despite their low check averages in comparison to full-service restaurants (FSRs), which garner the other 47% of sales. Ten years ago the percentages were

reversed: FSRs commanded 53% of the market while LSRs held 47%.

Within the LSR segment, fast-casual restaurants continue to gain marketshare, while fast-food restaurants are working to upscale their menu and concept positioning to compete with leading fast-casual chains. Fast-casual restaurants now represent 14% of all quick-service restaurant sales, compared to 5% in 2001.

The following are other findings of Technomic's study:

- Seventy-two percent (72%) of consumers visit fast-food restaurants once a week or more, while 49% visit fast-casual restaurants, in part, because there are fewer locations but also because they are more attractive to higher income consumers.
- Consumers visit fast-food and fast-casual restaurants for lunch more often than for any other daypart; 21% purchase fast-food lunches at least twice a week and 19% visit fast-casual restaurants, largely due to time pressures.
- Breakfast sandwiches have grown by 35% at fast-food restaurants and by 29% at fast-casual chains, showing the strength of breakfast entrées at LSRs.
- Gluten-free options and the growing importance of better-for-you kids' meals continue to guide better-for-you LSR menu development.
- Street food influences continue. Rustic, handheld street foods with a global spin have helped LSR menu developers create unique and craveable offerings. Consumers are looking for new flavor supplements for their sophisticated palettes.

Technomic foresees that there will be a blurring of the lines between fast-food and fast-casual restaurants, with operators in each subsegment tweaking their concepts with new unit designs and convenient service formats in order to remain competitive.

FINE-DINING

27.1 Market Assessment

Fine-dining restaurants are full-service restaurants with an upscale menu and extensive beverage offerings. The restaurants generally have a more sophisticated decor and ambiance, the waitstaff is usually highly trained and often wears more formal attire, and there is often a dress code for patrons. The line between fine-dining and casual-dining is becoming blurred as fine-dining restaurants have become more casual and many casual-dining restaurants are serving upscale cuisine.

By some estimates, fine-dining restaurants make up approximately 10% of total U.S. restaurant industry sales.

27.2 Market Trends

In a 2013 survey by the National Restaurant Association (www.restaurant.org), 47% of fine-dining operators assessed business conditions for their restaurant as good or excellent, the highest among all full-service segments. Thirty-eight percent (38%) anticipate increased sales in 2014; 10% anticipate a drop in sales.

No restaurant segment has benefitted more from the uptick in business and leisure travel following the recession than fine-dining. Travelers and tourists represent an average of 29% of sales for fine-dining operators, according to the National Restaurant Association. Americans took 2.05 billion person-trips in 2013, an all-time record, according to the U.S. Travel Association (www.ustravel.org). Traveler spending also rebounded to pre-recession levels in 2012. The increase in spending was twice that of the number of trips, indicating that those who do travel for business and leisure are spending more freely on things such as fine dining.

According to The NPD Group (www.npd.com), visits to fine-dining restaurants increased 6% in 2013; this followed a 4% rise in 2012. Still, increases in spending for fine dining have lagged overall increases in discretionary spending. One reason is because affluent consumers are increasingly choosing restaurant options other than fine dining.

“Upscale customers aren’t necessarily looking for traditional upscale experiences. They’re a lot more focused on bar food, socializing, and the entertainment aspect, with chefs cooking onsite.”

Bonnie Riggs, Analyst
The NPD Group
Nation’s Restaurant News

A survey of fine-dining patrons presented in *The Changing Face of America’s Fine Diners*, a report by RestaurantRx Consulting (www.restaurantrxconsulting.com), provided the following insight into the segment:

- Sixty-nine percent (69%) of those polled said food quality was most important to them when choosing where to dine. Half (50%) of respondents ranked inconsistent food quality as their top complaint at fine-dining restaurants, 20% said inconsistency, as a whole, was their biggest source of dissatisfaction, and 11% said inconsistency in service was their primary complaint.
 - When questioned about value, 52% of respondents said poor value was one of their top three complaints; 42% cited high menu prices as a source of dissatisfaction.
 - Sixty-three percent (63%) said they prefer simply prepared foods served casually rather than richer offerings delivered in a more formal setting; 61% said they were adventurous in their tastes and liked to experience new and exotic dishes.
 - Eighty-one percent (81%) of respondents in the survey said they preferred dining at a one-of-a-kind establishment, versus at an upscale national chain.
-

“Brands that cater to consumers making more than \$100,000 annually – about 20% of U.S. households, according to the U.S. Census Bureau – are doing comparatively well.”

Nation’s Restaurant News

FOOD CONCESSIONS AT AIRPORTS

28.1 Market Assessment

According to *ARN Fact Book*, published by Airport Revenue News (www.airportrevenuenews.com), annual food and beverage service at the 90 largest U.S. airports is \$3.3 billion. Food and beverage spending per enplaning passenger is \$5.12.

The following airports have the highest food and beverage sales:

- Hartsfield-Jackson Atlanta International Airport: \$235.4 million
- Chicago O'Hare International Airport: \$187.4 million
- Los Angeles International Airport: \$156.4 million
- John F. Kennedy International Airport (New York City): \$151.0 million
- Denver International Airport: \$149.5 million
- Dallas-Fort Worth International Airport: \$141.5 million
- San Francisco International Airport: \$124.5 million
- Charlotte/Douglas International Airport: \$101.7 million
- Miami International Airport: \$ 99.0 million
- Phoenix Sky Harbor International Airport: \$ 92.4 million

According to *PAX International*, a trade magazine that covers airport dining trends, airports are increasingly featuring local restaurants with high-quality, healthful food.

“Airports are trying to improve the experience for travelers, and part of that is bringing in restaurants serving fresher, local foods. Airports want to create an atmosphere of the city they’re in and make the airport more of a destination for shoppers and diners.”

Rick Lundstrom, Editor in Chief
PAX International

28.2 Market Leaders

According to *2013 Chain Restaurant Operators*, published by Chain Store Guide (www.chainstoreguide.com), there are 149 restaurant companies operating in airports. Among them, the following are the largest:

- Anton Airfood Inc. (www.airfood.com)
- CA One Services (www.delawarenorth.com)
- Concessions International (www.cintl.com)
- Delaware North Cos. (www.delawarenorth.com)
- HMSHost (www.hmshost.com)
- SSP America (www.foodtravelexperts.com)

28.3 Top Airport Restaurants

Food & Wine (January 2013) identified the following as the best restaurants at U.S. airports:

Austin-Bergstrom International Airport (Austin, TX)

- The Salt Lick (West Concourse)

Baltimore Washington International Airport (Baltimore, MD)

- Obrycki's (Concourse B)

Boston Logan International Airport (Boston, MA)

- Bonfire (Terminal B)
- Legal Test Kitchen (Terminal A)

Charlotte/Douglas International Airport (Charlotte, NC)

- Brookwood Farms BBQ (Main Terminal Atrium)
- Yadkin Valley Wine Bar (Connector Between Terminals D and E)

Chicago O'Hare International Airport (Chicago, IL)

- Berghoff Café (Terminal 1)
- Tortas Frontera (Terminal 1)

Dallas/Fort Worth International Airport (Dallas, TX)

- Cousin's Barbecue (Terminals B and D)
- La Bodega Winery (Terminals A and D)
- Pappadeaux Seafood Kitchen (Terminal A)

Denver International Airport (Denver, CO)

- New Belgium Hub (Concourse B)
- Tamales by La Casita (Concourse C)

General Mitchell International Airport (Milwaukee, WI)

- Usinger's (Concourse D)

George Bush Intercontinental Airport (Houston, TX)

- Pappadeaux Seafood Kitchen (Terminal E)

Hartsfield-Jackson Atlanta International Airport (Atlanta, GA)

- One Flew South (Terminal E)
- Paschal's Restaurant (Concourse A food court; Main Terminal Atrium)

John F. Kennedy International Airport (New York, NY)

- Aeronuova (Terminal 5)
- Brasserie La Vie (Terminal 5)
- Deep Blue (Terminal 5)
- Piquillo (Terminal 5)

LaGuardia International Airport (New York, NY)

- Custom Burgers by Pat LaFrieda (Terminal D)
- Figs (Central Terminal Building; between Concourses B & C)
- Prime Tavern (Terminal D)
- Tagliare (Terminal D)

Los Angeles International Airport (Los Angeles, CA)

- Encounter Restaurant (Theme Building)
- La Brea Bakery (Terminals 1, 2 and 7)
- Pink's Hot Dogs (Tom Bradley International Terminal)

Memphis International Airport (Memphis, TN)

- Corky's BBQ (Terminals A and C)

Miami International Airport (Miami, FL)

- Beaudevin (Terminal D)
- La Carreta (Terminal D)

Minneapolis-St. Paul International Airport (Saint Paul, MN)

- French Meadow Bakery & Café (Concourse F)
- Ike's Food and Cocktails (The Mall; across from Checkpoint 1)

Newark Liberty International Airport (Newark, NJ)

- Gallagher's Steak House (Terminal C)
- Vino Volo (Terminal C)

Philadelphia International Airport (Philadelphia, PA)

- Chickie's & Pete's (Terminals A-West, C, and E)
- Vino Volo (Concourse B; between Terminals B and C; between Terminals D and E)

Phoenix Sky Harbor International Airport (Phoenix, AZ)

- El Bravo (Terminal 4)

Portland International Airport (Portland, OR)

- Rogue Ales (Concourse D)

San Antonio International Airport (San Antonio, TX)

- Vino Volo (Terminal A)

San Francisco International Airport (San Francisco, CA)

- Anchor Brewing Company (Terminal 3)
- Burger Joint (International Terminal)
- Cat Cora (Terminal 2)
- Ebisu (International Terminal)
- Klein's Deli and Coffee Bar (Terminals 1 and 3)
- Perry's (Terminal 1)
- Rotisserie (Terminal 2)

Seattle-Tacoma International Airport (Seattle, WA)

- Anthony's (Central Terminal)
- Dish D'Lish (Central Terminal)

Washington Dulles International Airport (Dulles, VA)

- Five Guys Burgers and Fires (Terminals A and B)
- Vino Volo (Concourses B and C)

28.4 Market Resources

Airport Revenue News, 3200 North Military Trail, Suite 110, Boca Raton, FL 33431.
(561) 477-3417. (www.airportrevenue.com)

FOOD CONCESSIONS AT SPORTS VENUES

29.1 Market Assessment

Annual revenue from on-site game-day concessions at professional sports stadiums and arenas is approximately \$15 billion. Per capita spending on food and beverage is typically between \$12 and \$18.

Of 127 major league facilities, 112 have contracts with independent companies to operate their general concessions; 15 have in-house operations, according to *SportsBusiness Journal*. For premium-seat catering, 114 facilities have contracted with outside suppliers; 13 handle this service in-house.

Premium concessions are probably the most lucrative aspect of sports arena foodservice. The NFL's suite/club seating market alone yields somewhere in the neighborhood of \$2 billion annually, according to the Association of Luxury Suite Directors (www.alsd.com).

29.2 Concessionaires

According to *SportsBusiness Journal* (May 2013), the sports concessions business is distributed by vendor marketshare as follows:

Stadiums	General	Premium
• Aramark (www.aramark.com):	27.0%	24.0%
• Delaware North Sportservice (www.delawarenorth.com):	24.3%	21.3%
• Centerplate (www.centerplate.com):	21.6%	16.0%
• Levy Restaurants (www.levyrestaurants.com):	14.9%	21.3%
• Legends Hospitality (www.legends.net):	4.1%	4.0%
• Others:	8.1%	13.3%
 Arenas	 General	 Premium
• Levy Restaurants (www.levyrestaurants.com):	41.3%	47.9%
• Aramark (www.aramark.com):	30.4%	20.8%
• Delaware North Sportservice (www.delawarenorth.com):	13.0%	10.4%
• Centerplate (www.centerplate.com):	6.5%	6.3%
• Savor (www.savormg.com):	6.5%	6.3%
• Others:	2.2%	8.3%

29.3 Best Food At Stadiums And Arenas

In 2013, The Daily Meal (www.thedailymeal.com) ranked the following professional sports stadiums and arenas best for food:

- Citi Field (Queens, New York, NY)
- Mercedes-Benz Superdome (New Orleans, LA)
- Cowboys Stadium (Dallas, TX)
- Madison Square Garden (New York, NY)
- Rose Garden (Portland, OR)
- PNC Park (Pittsburgh, PA)
- AT&T Park (San Francisco, CA)
- Chesapeake Energy Arena (Oklahoma City, OK)
- Staples Center (Los Angeles, CA)
- Bridgestone Arena (Nashville, TN)
- Great American Ball Park (Cincinnati, OH)
- Air Canada Centre (Toronto, ON, Canada)
- Lambeau Field (Green Bay, WI)
- CenturyLink Field (Seattle, WA)
- Fenway Park (Boston, MA)

The following stadiums and arenas serve the best luxury-box food:

- Staples Center (Los Angeles, CA)
- Cowboys Stadium (Dallas, TX)
- Jeld-Wen Field (Portland, OR)
- Wells Fargo Center (Philadelphia, PA)
- Saratoga Race Track (Saratoga, NY)
- Wrigley Field (Chicago, IL)
- Nationals Field (Washington, DC)

The following college stadiums rank highest for foodservice:

- University of Notre Dame
- Stanford University
- University of Oregon
- Brigham Young University
- University of Alabama
- University of Wisconsin
- University of Nebraska
- University of Missouri

The following are favorite menu items:

- Maine Lobster Mac and Cheese at Ketel One Club, United Center (Chicago, IL)
- Wild Copper River Sockeye Salmon Fish Tacos at Pyramid Tap Room, The Rose Garden (Portland, OR)
- Barbecue Brisket Nachos at Chef's Corners at American Airlines Center (Dallas, TX)
- Crab Fries at Chickie and Pete's at Wells Fargo Center (Philadelphia, PA)

- Poutine Hot Dog at Burkie's Dog House at The Air Canada Centre (Toronto, ON, Canada)
- Dessert Cart at Staples Center (Los Angeles, CA)
- Prime Rib Sandwich at The Prime Rib at Madison Square Garden (New York, NY)
- Beef Medallions at Blue Sky Grill at Pepsi Center (Denver, CO)
- Jambalaya at Centerplate at New Orleans Arena (New Orleans, LA)
- Buffet at Skyline at Arco Arena (Sacramento, CA)

Hot dogs remain a favorite at ball parks. The Hot Dog & Sausage Council (www.hot-dog.org) estimated that 20.5 million hot dogs were consumed in major league stadiums during the 2013 season. The top hot dog-eating stadiums are as follows:

- Rangers Ballpark (Texas Rangers): 1.6 million
- Citizen's Bank Park (Philadelphia Phillies): 1.5 million
- Fenway Park (Boston Red Sox): 1.5 million

29.4 Market Resources

SportsBusiness Journal, 120 West Morehead Street, Suite 310, Charlotte, NC 28202. (704) 973-1400. (www.sportsbusinessjournal.com)

The Daily Meal, 156 5th Avenue, Suite 400, New York, NY 10010. (www.thedailymeal.com)

FOOD COURTS

30.1 Overview

Food courts, a concept that dates to the mid-1970s, have multiple food vendors and a common area for self-serve dining. They provide foodservice at large malls and toll road service plazas. Major tourist attractions and parks often have food courts. There are standalone food courts in New York City and some other metropolitan downtown areas. Some colleges are complementing traditional cafeteria foodservice with food courts.

Millions of travelers pass through airport terminals and major rail transportation terminals making them prime venues for food courts.

“Airports and train stations are emerging as one of the biggest new battlefields for restaurant operators. An increasing number of branded and independent companies are targeting these venues to benefit from the high volume of traffic, raise brand awareness, reach new audiences, and introduce new concepts.”

Nation's Restaurant News, 5/14/13

30.2 Market Assessment

According to the International Council of Shopping Centers (ICSC, www.icsc.org), mall food court sales are \$902 per sq. ft. (as of December 2013).

30.3 Mall-Based Food Courts

Food courts and other mall foodservice have changed in recent years. Gone are the sterile common dining areas that were designed to be easily cleaned and maintained

but without regard for the customer's experience. Today's mall food courts are inviting – some even have fireplaces.

Mall operators have good incentive to provide inviting food courts: Shoppers spend an average of 45 minutes more in the mall if there are food options. This translates to increased spending. According to the ICSC, shoppers that visit a mall for less than 30 minutes spend 44% less than the overall average mall spend; those whose mall visits last 180 minutes or longer spend 52% more than the average.

Approximately 7% of shoppers go to malls specifically for food. According to Macerich Co., one of the larger shopping center operators in the U.S., a slate of restaurants at a mall can draw upwards of two million diners a year, many of whom might not visit the mall otherwise.

Mall operators have also worked to attract upscale casual-dining restaurants. These restaurants are aimed to complement traditional food court offerings.

30.4 Service Plaza Food Courts

Service plazas have been viewed a little more than a "pit stop," providing fuel and basic foodservice for toll road travelers. Food courts at service plazas were viewed as serving a captive audience and there was little incentive to provide upscale options. The view of toll road operators has shifted. Service plaza food service is now seen as a profit center and many state agencies are upgrading their food courts. The following are some examples:

- Connecticut Service Plazas (<http://ctserviceplazas.com>), of which there are 23, are being renovated by Project Service LLC, which has a 35-year contract to operate the facilities. Plazas are being renovated to meet Silver LEED standards; food options are being expanded.
- Florida's Turnpike Enterprise (www.floridasturnpike.com) is renovating its eight service plazas. Gone is the one-size fits all approach with every plaza the same size with the same bland architecture. Franchises selected for food courts are based on commuter surveys.
- The Pennsylvania Turnpike Commission (www.paturnpike.com) is redesigning and constructing 17 new service plazas across the Turnpike system. Each design includes a modern food-court layout and a convenience store under the same roof. HMS Host Family Restaurants and Sunoco have contracts for the renovation projects and operation of the plazas. As of March 2014, 14 plazas had been rebuilt.

30.5 Top Food Courts

The following are among the best food courts in the United States:

Airports

- Hartsfield-Jackson International Airport (Atlanta, GA)
- John F Kennedy International Airport (New York, NY)
- Los Angeles International Airport (Los Angeles, CA)

- Louis Armstrong International Airport (New Orleans, LA)
- O'Hare International Airport (Chicago, IL)
- Salt Lake City International Airport (Salt Lake City, UT)

Railroad Terminals

- Dining Concourse at Grand Central Terminal (New York, NY)
- Union Station (Washington, DC)

Shopping Malls

- foodlife at Water Tower Place (Chicago, IL)
- Grand Canal Shops (Las Vegas, NV)
- King of Prussia Mall (King of Prussia, PA)
- Mall of America (Minneapolis, MN)
- New World Mall (Flushing, NY)
- NorthPark Center (Dallas, TX)
- Piazza d Giorgio at Galleria Mall (Ft. Lauderdale, FL)
- Queens Center Mall (New York, NY)
- Scottsdale Fashion Square (Scottsdale, AZ)
- The Food Emporium at Westfield San Francisco Shopping Centre (San Francisco, CA)

30.6 Market Resources

International Council of Shopping Centers, 1221 Avenue of the Americas, 41st Floor, New York, NY 10020. (646) 728-3800. (www.icsc.org)

FOOD TRUCKS

31.1 Market Assessment

A rapidly growing segment in the foodservice marketplace is food trucks, also referred to as food trailers and food carts. Some trucks are chef-operated and many offer unique ethnic cuisine.

A 2013 assessment of the food truck segment by The NPD Group (www.npd.com) found types of food offered as follows:

- Hot sandwiches: 71%
- Mexican food: 61%
- Cold sandwiches: 44%
- Soup: 24%
- Salads: 22%
- Pasta/Italian food: 19%
- Other: 13%

The Kruse Company estimates annual food truck sales at \$5 billion, an increase from virtually zero only five years ago.

The gourmet food truck segment has its roots in Austin, Los Angeles, and Portland, where a few innovative chefs pioneered the concept. The rise of gourmet food trucks as a dining option has been fueled by features in *Food & Wine*, *Forbes Traveler*, *The New York Times*, and *USA Today*, among other national periodicals, as well as local media sources. The concept has spread to most major cities throughout the United States.

The food truck business model has appealed to operators hesitant to sink millions of dollars into a high-concept restaurant. According to *The New York Times*, a new food truck costs about \$125,000; adding specialized kitchen equipment and enhancements can push the cost up to \$250,000. This compares favorably to opening a bricks-and-mortar restaurant, where \$850,000 to \$1.5 million in start-up capital is typically needed to secure a lease, renovate a space, equip a kitchen, and hire a staff.

31.2 Threat To Traditional Restaurants

The food truck trend receives a mixed reception from the established restaurant community. While some applaud the creativity, many feel that truck-based operators compete unfairly with traditional restaurants because of their lower capital investment

and lax regulatory oversight. Many restaurant operators see food trucks as a competitive threat.

“Since food trucks appeared on the restaurant scene their threat to brick-and-mortar restaurants has been widely debated. For now at least, food trucks need not be viewed as a threat to restaurant demand nationally. However, in markets with a developed food truck presence, QSR operators may wish to take note of the benefits food trucks offer [to customers].”

Bonnie Riggs, Analyst
The NPD Group, 8/19/13

In 2013, The NPD Group conducted a survey to assess the impact of the segment on traditional restaurants. The survey asked customers the reason they visit food trucks. Responses were as follows:

- Convenience: 44%
- Different food available: 41%
- Cost less: 20%
- Personal preference: 17%
- Freshness of food: 15%
- Faster service: 13%
- Other: 9%

When asked where they would have gotten their meals if a food truck was not around, responses were as follows:

- Ordered from a fast-food restaurant: 46%
- Skipped the meal altogether: 23%
- Gotten something at work or school: 14%
- Brought something from home: 11%
- Opted to visit a full-service restaurant: 8%

31.3 Segment Trends

The growth of the segment in the cities where the concept was pioneered suggests that food trucks are more than a passing fad. More than 500 food truck operators were active in Austin, Los Angeles, and Portland at year-end 2013.

Food trucks have developed a cult-like following in some cities, with many developing their huge following via Facebook and Twitter. Reviews on sites such as UrbanSpoon and Yelp have helped fuel interest.

Established restaurants are launching food truck operations to expand their brand, and mobile chefs are opening casual-dining locations.

In Los Angeles, Roy Choi, the owner-chef of the popular Kogi BBQ truck, has opened three bricks-and-mortar restaurants: Chego, A-Frame, and Sunny Spot. In Miami, Richard Hales, owner-chef of award-winning Dim Ssam A Go Go food truck, also operates Sakaya Kitchen and Black Brick Chinese & Dim Sum.

Several units of restaurant chains including Chick-fil-A, Dairy Queen, Gold Star Chili, Qdoba Mexican Grill, Sizzler, and Taco Bell have rolled out food trucks; some are using their vehicles as catering operations and test kitchens on wheels. Operating their food trucks at local events also builds brand awareness.

An example of food truck operation by a brand is two Chick-fil-A franchises outside of Washington, DC. The franchisee launched a mobile unit with an abbreviated menu and serves some 200 to 300 customers daily, five days a week. The truck is also used for catering and special weekend events.

“Franchises should be testing food trucks in their high-density markets. It’s a great opportunity to try it and see how it works.”

David Gonzalez, Senior Vice President
Franchise Dynamics
Nation’s Restaurant News, 8/19/13

31.4 Local Regulations

Local regulation of food trucks varies. In some cities trucks must be tethered to pods or parked in designated lots. In others, food trucks can freely cruise and set-up almost anywhere the operators choose.

“New Orleans, for example, requires mobile food vendors to change locations after 45 minutes in one spot. Among other restrictions, Chicago’s food trucks have had to fight to cook onboard, Washington DC’s are technically supposed to vacate once their line of clients clears, LA’s have to park within 200 feet of a bathroom where workers can wash hands, New York’s got booted from Midtown, and in cities like Atlanta and Austin, trucks have largely been relegated to group parks.”

The Daily Meal

31.5 Best Food Trucks

A selection by The Daily Meal (www.thedailymeal.com) of the best food trucks in the U.S. is presented in Chapter 115 of this handbook.

PIZZA

32.1 Market Assessment

Over five billion pizzas were sold in the United States in 2013, according to the National Association of Pizza Operators (NAPO, www.napo.com).

CHD Expert (www.chd-expert.com) assessed the 2013 U.S. pizza market at \$46 billion. Quick-service restaurants hold \$33 billion of the market while full-service pizza restaurant sales are \$3.5 billion. Independents have a 56% marketshare; large chains garner 30.5% of the market.

Fourteen (14) pizza chains ranked among the 200 largest U.S. restaurant chains in 2013, according to *Nation's Restaurant News*. Their combined sales were \$17.68 billion; they operated 24,188 units.

32.2 Segment Trends

According to *Pizza Consumer Trend Report*, a report by Technomic (www.technomic.com), 41% of consumers eat pizza once a week, an increase from 26% who did so in 2010.

Technomic identifies the following trends in the pizza restaurant segment:

- The latest menu trends call for authenticity, from Neapolitan, Sicilian, and other regional Italian interpretations, to depth-of-flavor preparations such as hearth-baked, wood-fired, coal, and brick-oven cooking.
- Combo-meat varieties and calzone-style stuffed pizzas stand out as growth areas at limited-service restaurants (LSR). At full-service restaurants, there has been slight growth in the number of veggie/garden and combo-meat pizzas.
- Chicken's adaptability contributes to its widespread use as the top listed protein topping in the full-service segment and third most-frequently listed protein in limited-service, largely due to barbeque and Buffalo chicken varieties.
- Thirty-seven percent (37%) of consumers order pizza from non-pizza limited-service and fast-casual restaurant locations once a month, signaling room for growth for these concepts and a potential threat for LSR pizza chains.
- Forty-nine percent (49%) of consumers are purchasing pizza from a grocery store once a month, making it the second leading foodservice source for pizza, surpassed only by LSR pizza restaurants (71%).
- All foodservice pizza purchases have increased over the past two years, but carryout and dine-in pizza occasions have increased the most; 68% of consumers

now order carryout pizza once a month or more, followed by 45% who say they order pizza for dine-in.

Online ordering and increased use of mobile devices is changing ordering patterns for pizza delivery outlets. Online ordering represents 25% of Domino's sales.

The convenience provided by takeout and delivery remains a major driver in the pizza marketplace. Seventy percent (70%) of Domino's business is delivery.

Responding to the increased interest in healthful dining, most pizza chains have made strides to serve more healthful fare by offering salads, vegetarian pizzas, and gluten-free pizzas, among other items.

Marketshare gains in the pizza segment have come, in part, at the expense of frozen pizzas. According to IBISWorld (www.ibisworld.com), sales of frozen pizza fell 9% between 2011 and 2013.

“Consumers, seeking freshness, authenticity, and perhaps a little adventure, abandoned freezer cases and returned to pizza parlors. Operators have welcomed them with a plethora of truly creative pies.”

Nancy Kruse, President
Kruse Company
Nation's Restaurant News, 3/11/13

32.3 Fast-Casual Pizza Chains

Several pizza chains operating in a fast-casual format have recently launched. These include Blaze Pizza (Pasadena, CA), Pie Five Pizza Co. (The Colony, TX), Mod Pizza (Seattle, WA), Pie Five Pizza Co. (The Colony, TX), Pizzarev (Los Angeles, CA), The Pizza Studio (Los Angeles, CA), Top That! Pizza (Tulsa, OK), and Uncle Maddio's Pizza (Atlanta, GA). They join established fast-casual chains Brixx Wood Fired Pizza, Donatos Pizza, Fazoli's, Jerry's Subs & Pizza, RedBrick Pizza, Straw Hat Pizza, The Loop Pizza Grill, and zpizza.

“Over the past few years, a hotter-than-hot niche has emerged within the \$40 billion pizza space that many are watching with keen interest. Dubbed fast-casual pizza, roughly two dozen concepts already have surfaced with plans to take their build-your-own single-serving pies to new markets nationwide.”

Nation's Restaurant News, 5/27/13

32.4 Market Resources

National Association of Pizza Operators, 908 South 8th Street, Suite 200, Louisville, KY 40203. (502) 736-9500. (www.napo.com)

QUICK-SERVICE RESTAURANTS

33.1 Profile

According to The NPD Group (www.npd.com), traffic at quick-service restaurants (QSRs) is distributed by meal occasion as follows:

- Morning meal: 20%
- Lunch: 37%
- Supper: 29%
- P.M. snack: 14%

Burgers hold a lion's share of the QSR market. An emphasis on chicken sandwiches and wraps, however, is diversifying the QSR menu.

According to Sandelman & Associates (www.sandelman.com), eat-in dining comprises 30% of all quick-service occasions. Drive-thru makes up 40%, carryout accounts for 23%, and delivery comprises 7%.

In a 2013 survey by the National Restaurant Association (www.restaurant.org), 49% of quick-service operators assessed business conditions for their restaurant as good or excellent. Twenty-nine percent (29%) anticipate increased sales in 2014; 9% anticipate a drop in sales. For comparison, 55% and 37% of operators, respectively, in fast-casual and casual-dining sectors anticipate sales increases.

33.3 The QSR Customer

Understanding Quick-Service Restaurants and Their Customers, a report by Technomic (www.technomic.com), provides the following profile of QSR customers:

- QSR patronage tends to peak with the 25-to-34 age group, then decrease with each age cohort.
- Eighty-two percent (82%) of QSR consumers rate the food quality at their recent visits as good or very good.
- Consumers form opinions about products and services whether they have had first-hand experience or not. Sixty-six percent (66%) of consumers feel that the average QSR is good or very good at emotional connection; and 58% say the same of brand image.
- Eighty percent (80%) of adults say they are willing to recommend the QSRs that they rate highly to friends and family.

A study by Sandelman & Associates assessed metropolitan areas for quick-service dining frequency. The following metropolitan areas are identified as having the highest percentages of adults who eat fast-food 20 or more times per month:

- Dallas, TX: 34.0%
- McAllen, TX: 33.1%
- Providence, RI: 31.5%
- Memphis, TN: 31.1%
- Greensboro, NC: 30.5%
- Charleston/Huntington, WV: 30.4%
- Lexington, KY: 30.0%
- Columbia, SC: 29.8%
- Houston, TX: 29.8%
- Greenville, SC: 29.8%

The following metropolitan areas are identified as having the highest percentages of adults who do not eat fast-food at all:

- Monterey/Salinas, CA: 19.4%
- Eugene, OR: 17.4%
- Hartford, CT: 17.4%
- West Palm Beach, FL: 17.2%
- Boston, MA: 16.5%
- Providence, RI: 16.5%
- Syracuse, NY: 16.5%
- Anchorage, AK: 16.1%
- San Francisco, CA: 15.7%
- Albany, NY: 15.6%

According to The NPD Group, multi-daypart customers – those who visit a QSR for more than one meal – account for a disproportionately high percentage of sales. While multi-daypart buyers comprise 21% of QSR customers, they account for 35% of visits. They visit a QSR 4.6 times monthly, on average, while single-daypart customers average 2.2 visits. The following is a distribution of multi-daypart customer traffic (source: The NPD Group):

- Lunch and supper: 43%
- Morning meal and evening snack: 12%
- Morning meal and lunch: 11%
- Three or more dayparts: 11%
- Lunch and evening snack: 7%
- Supper and evening snack: 7%
- Morning meal and supper: 5%

33.2 Competition From The Fast-Casual Segment

Visits to quick-service restaurants generally hold up better throughout economic downturns than any other segment. However, competition from the fast-casual segment hindered growth during the Great Recession and prolonged recovery.

“They’re chasing the fast-casual segment. That’s exactly what’s going on. We’ve been tracking fast-food for well over 30 years, and during every period of recession and economic downturn, fast-food has never experienced this kind of poor performance for this long a period of time. In 2009 the sector experienced negative growth, then leveled off. It’s not growing, nor is it forecasted to grow.”

Bonnie Riggs, Analyst
The NPD Group, 1/23/13

Responding to competition from their fast-casual counterparts, QSR chains are evolving their service to defend their marketshare. McDonald’s, for example, is offering more customization, Pizza Hut and Domino’s Pizza have introduced new prototype restaurant designs, and KFC is testing an “innovation restaurant” called KFC Eleven.

“These four brands, or any quick-service brand, would love to have the demographics of the fast-casual customer. Integrating fast-casual service methods into quick-service chains’ existing setups could successfully make those brands more relevant to fast-casual consumers.”

John Gordon, Principal
Pacific Management Consulting Group
Nation’s Restaurant News, 2/24/14

A comparison of QSRs and fast-casual restaurants is presented in Section 26.4 of this handbook.

33.4 Drive-Thru

Since 1998, *QSR* magazine has conducted an annual Drive-Thru Performance Study, comparing the speed and accuracy of service at the drive-thru of major QSR chains.

“The importance of the drive-thru business to the \$299 billion fast-food industry cannot be overstated. Many major chains do 60% to 70% of their business at the drive-thru.”

USA Today, 9/30/13

The *QSR* surveys have documented changes in drive-thru performance over the years. Speed of service has dropped slightly as menus have expanded, and there is an increased emphasis on accuracy. Accuracy ratings in the 2013 assessment ranged from 82.3% (Burger King) to 91.6% (Chick-fil-A); the range was 61.8% to 83.9% when the annual study launched.

“If operators were to formally rank their priorities, accuracy would likely be No. 1 at each of the brands. It doesn’t matter how fast you get the food out; if the order is wrong, the whole experience turns sour.”

QSR, 10/13

Accuracy improvements can, in part, be attributed to order-confirmation boards (OCBs), which are used systemwide at Burger King, Krystal, McDonald’s, Taco Bell,

and Wendy's.

Service speed reported in the 2013 assessment ranged from 133.6 seconds (Wendy's) to 203.9 seconds (Chick-fil-A). Among the six major QSR chains, Burger King was the only brand that improved speed of service from 2012.

SUPERMARKET & RETAIL PREPARED FOODS

34.1 Market Assessment

Prepared foods from supermarkets are part of the overall market dubbed 'home meal replacements' (HMR) or 'retail meal solutions' (RMS).

According to Technomic (www.technomic.com), retail RMS are a \$37 billion market, which includes \$10 billion in beverage sales. The category also includes frozen entrées as well as prepared foods. Over the past five years RMS growth has been strongest within non-supermarket channels, such as supercenters and warehouse clubs.

“Grocery, convenience stores, and drug store retailers have long nipped at restaurant sales, but lately those retailers are stepping up their game in an effort to take bigger bites of the foodservice pie.”

Nation's Restaurant News, 1/13/14

According to The NPD Group (www.npd.com), supermarkets and other retail outlets (excluding convenience stores and chains located within retail stores) garner 6% of the roughly 62 billion commercial foodservice meals and snacks consumed annually. This amounts to about 3.7 billion meals and snacks purchased for consumption within six hours. Distribution is as follows:

- Morning meal: 21%
- Lunch: 27%
- Supper: 17%
- Evening/night snack: 35%

A Look Into The Future Of Foodservice, a 2013 report by The NPD Group, projects spending to HMRs to increase 10% through 2022, while overall restaurant

traffic is expected to increase 4%.

“Home meal replacements or prepared foods from supermarkets, drug stores, and other retail outlets will continue to capture share of the meal/snacks market by stealing visits from restaurants.”

The NPD Group, 7/16/13

34.2 Prepared Food Market Characteristics

The NPD Group found that consumers of all ages purchase prepared foods from retailers at about the same frequency. The types of foods purchased, however, varies among generations.

“In terms of prepared foods purchased, younger adults are more likely than those older to purchase pizza, hot dogs, and burgers to eat at home. Consumers 50+ years [old] are interested in purchasing both fried and non-fried chicken. Younger adults are more inclined to order non-fried chicken than fried chicken. The home meal replacement entrees purchased most frequently from retail outlets include chicken, pizza, and macaroni and cheese. Sandwiches are also popular take-home items.”

The NPD Group, 7/16/13

34.3 Supermarket Restaurants

Most supermarkets provide an in-store area where customers can eat prepared foods. Some stores have taken the concept a step further. The following are examples:

- Many Whole Foods stores feature hot and cold buffet lines, chefs at cooking stations, and pizza ovens, along with expanded dining areas. The 59,000-square-foot Whole Foods store at the Time Warner Center in New York City has a sleek 300-seat dining area. Some Whole Food locations even have live music in the dining area on the weekends.
- Epicure Gourmet Market (Sunny Isles, Florida) has a full-service bar and outdoor patio with umbrella-shaded tables for customers.
- Wegmans stores have a sprawling Market Cafe area where customers have an extensive selection of prepared foods for consumption in an adjacent dining area. Wegmans' outlet in Providence, Rhode Island, includes The Pub, a table-service restaurant and bar.

Other grocery brands operating on-premise full-service restaurants include Bristol Farms, Buehler's, and Lunds/Byerly's.

34.4 Market Trends

According to *Retailer Meal Solutions Consumer Trend Report*, published in 2013 by Technomic, 38% of consumers say that they purchase RMS from traditional supermarkets each week, a decline from 42% who did so in 2010.

“At the height of the economic downturn, many consumers flocked to supermarkets, mass merchandisers, warehouse clubs and other retailers, looking for a deal on prepared foods. But now that the economy is recovering from the recession ... these consumers may be reversing the patterns they set a couple of years ago by heading back to restaurants. For retailers to gain or maintain their share of foodservice dollars, they'll need to clearly stand out from restaurants.”

Darren Tristano, Exec. V.P.
Technomic, 1/29/13

The following are other findings of the Technomic report:

- Among those who purchase RMS at least once a month, 43% do so four or more times per month.
- Opportunities exist for retailers to leverage their customization options to compete with restaurants; only 38% of consumers say that retail prepared foods allow for more customization than food purchased from a restaurant.
- While half of consumers think the quality of prepared foods has greatly improved since 2010, 40% say they would like to see more name-brand foods that typically denote a higher quality perception.

PART VI: MARKET LEADERS

LARGEST BAKERY CAFE CHAINS

35.1 Largest Chains

According to *Top 25 Bakery Cafe Chains Restaurant Report*, by Technomic (www.technomic.com), the following are the largest bakery cafe chains in the U.S.:

- Alonti
- Atlanta Bread Company
- Au Bon Pain
- Bear Rock
- Boudin Bakery
- Boudin San Francisco
- Cafe Carolina and Bakery
- Cafe Express
- Camille's Sidewalk Cafe
- Champagne French Bakery Cafe
- Corner Bakery Cafe
- Crispers Fresh Salads and Such
- Einstein Bros. Bagels
- Europa Café
- Frullati Café & Bakery
- Jazzman's Cafe & Bakery
- La Madeline Country French Cafe
- Le Boulanger
- Le Pain Quotidien
- Panera Bread
- Paradise Bakery
- Pax Wholesome Foods
- Sandella's Flatbread Cafe
- Specialty's Café & Bakery
- Wildflower Bread Company

35.2 Market Resources

Top 25 Bakery Cafe Chains Restaurant Report, Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)

LARGEST BURGER CHAINS

36.1 Largest Chains

According to *Top 75 Limited-Service Burger Chains Restaurant Report*, published by Technomic (www.technomic.com), the following are the largest limited-service burger chains in the U.S.:

- A&W All-American Food
- Arctic Circle Restaurants
- B-BOP'S
- b.good
- Back Yard Burgers
- Bagger Dave's Legendary Burger Tavern
- Baker's Drive Thru
- Beck's Prime
- Better Burger NYC
- Blake's Lotaburger
- Blazing Onion Burger Company
- Boardwalk Fresh Burgers & Fries
- Bobby's Burger Palace
- Burger Hut Burgers
- Burger King
- Burger Lounge
- Burger Street
- Burgerville
- Canyons Burger Company
- Carl's Jr.
- Central Park USA
- Checkers Drive-In Restaurants
- Cheeseburger Bobby's
- Cheeseburger Charley's
- Culver's
- Elevation Burger
- Energy Kitchen
- Evos'...Feel Great Fast Food
- Farmer Boys
- Fatburger
- Five Guys Burgers and Fries

- Flamers Burgers and Chicken
- Foster's Grille
- Freddy's Frozen Custard & Steakburgers
- Fuddruckers
- Good Times Burgers & Frozen Custard
- Hardee's
- Iceberg Drive Inn
- In-N-Out Burger
- Jack in the Box
- Jack's
- Jake's Wayback Burgers
- Johnnie's Charcoal Broiler
- Johnny's Lunch
- Jollibee
- Kidd Valley
- Krystal Company
- Larkburger
- M Burger
- Martin's Restaurants
- McDonald's
- Meatheads Burgers & Fries
- Mighty Fine Burgers, Fries & Shakes
- Mooyah Burgers & Fries
- New York Burger Co.
- Original Hamburger Stand
- Pal's Sudden Service
- Rally's Hamburgers
- Remington Grill
- Schoop's Hamburgers
- Shake Shack
- Showmars Restaurant
- Smashburger
- Sonic Drive-Ins
- Spangles
- The Counter
- The Habit Burger Grill
- Umami Burger
- Village Burger Bar
- Ward's Food Systems
- Wendy's
- Whataburger
- White Castle
- Wild Willy's Burgers

36.2 Market Resources

Top 75 Limited-Service Burger Chains Restaurant Report, Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004.
(www.technomic.com)

LARGEST FAMILY-DINING CHAINS

37.1 Largest Chains

The following are the largest family-dining chains (source: Technomic):

- Bakers Square
- Big Boy Restaurants
- Bob Evans Restaurants
- Carrows
- Coco's Bakery Restaurant
- Country Kitchen
- Country Market Restaurant & Buffet
- Cracker Barrel Old Country Store
- Denny's
- Eat'n Park
- Elmer's
- First Watch
- Friendly's
- Golden Corral Buffet & Grill
- Huddle House
- IHOP
- Luby's
- Marie Callender's Restaurant & Bakery
- Mimi's Cafe
- Old Country Buffet/HomeTown Buffet
- Perkins Restaurant & Bakery
- Ryan's
- Shari's Restaurants
- Shoney's
- Sizzler
- The Original Pancake House
- Village Inn
- Waffle House

37.2 Market Resources

Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606.
(312) 876-0004. (www.technomic.com)

LARGEST FAST-CASUAL CHAINS

38.1 Largest Chains

According to *Top 100 Fast-Casual Chain Restaurant Report*, published by Technomic (www.technomic.com), the following are the largest fast-casual chains in the U.S.:

- Alonti
- Atlanta Bread Company
- Au Bon Pain
- Back Yard Burgers
- Baja Fresh Mexican Grill
- Bajio Mexican Grill
- Boston Market
- Brixx Wood Fired Pizza
- Bruegger's Bagel Bakery
- Buona Beef
- Burgerville
- Cafe Express
- Cafe Rio Mexican Grill
- California Tortilla
- Camille's Sidewalk Cafe
- Chipotle Mexican Grill
- Chop't Creative Salad Company
- Corner Bakery Cafe
- Cosi
- Costa Vida Fresh Mexican Grill
- CPK
- Crispers
- D'Angelo Grilled Sandwiches
- Daphne's Greek Cafe
- Donatos Pizza
- Einstein Bros. Bagels
- El Pollo Loco
- Farmer Boys
- Fatburger
- Fazoli's
- Five Guys Burgers and Fries

- Freebirds World Burrito
- Fuddruckers
- Grand Traverse Pie Company
- Great Wraps
- Jake's Wayback Burgers
- Jason's Deli
- Jazzman's Café & Bakery
- Jerry's Subs & Pizza
- la Madeleine
- La Salsa Fresh Mexican Grill
- Le Pain Quotidien
- Leeann Chin
- Loving Hut
- McAlister's Deli
- Moe's Southwest Grill
- Mr. Pickle's Sandwich Shop
- Nature's Table Cafe
- Newk's Express Cafe
- Noodles & Company
- Panchero's Mexican Grill
- Panda Express
- Pandini's
- Panera Bread
- Paradise Bakery & Cafe
- Pat & Oscar's
- Pei Wei Asian Diner
- Pick Up Stix
- Pollo Campero
- Pollo Tropical
- Portillo's Hot Dogs
- Pret A Manger
- Qdoba Mexican Grill
- Raising Cane's Chicken Fingers
- RedBrick Pizza
- Rosa's Cafe Tortilla Factory
- Rubio's Fresh Mexican Grill
- Rumbi Island Grill
- Salad Creations
- Saladworks
- Salsarita's Fresh Cantina
- Sandella's Flatbread Cafe
- SanSai Japanese Grill
- Schlotzsky's
- Shane's Rib Shack

- Sharky's Woodfired Mexican Grill
- Showmars Restaurant
- Smashburger
- Smithfield's Chicken 'N Bar-B-Q
- Specialty's Café & Bakery
- Spicy Pickle
- Straw Hat Pizza
- Taco Bueno
- Taco Cabana
- Taco Del Mar
- The Counter
- The Habit Burger Grill
- The Loop Pizza Grill
- Tijuana Flats
- Wahoo's Fish Taco
- Which Wich?
- Wildflower Bread Company
- Wing Zone
- Wings To Go
- Wingstop
- Wolfgang Puck Express
- Zaxby's
- Zoës Kitchen
- Zoup! Fresh Soup Company
- zpizza

38.2 Market Resources

Top 100 Fast-Casual Chain Restaurant Report, Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)

LARGEST MEXICAN CHAINS

39.1 Largest Chains

According to *Top 50 Limited-Service Mexican Chains Restaurant Report*, by Technomic (www.technomic.com), the following are the largest limited-service Mexican restaurant chains in the U.S.:

- 360 Degree Gourmet Burrito
- Baja Fresh Mexican Grill
- Baja Sol Tortilla Grill
- Bajio Mexican Grill
- Barberitos
- Berryhill Baja Grill
- Bobby Salazar's Mexican Restaurant
- Cafe Rio Mexican Grill
- California Tortilla
- Chipotle Mexican Grill
- Chronic Tacos
- Costa Vida
- Currito :: Burritos Without Borders
- Del Taco
- Desert Moon Fresh Mexican Grille
- El Taco Tote
- Filiberto's Mexican Food
- Freebirds World Burrito
- Green Burrito
- High Tech Burrito
- Jimboy's Tacos
- La Bamba
- La Salsa Fresh Mexican Grill
- Lime Fresh Mexican Grill
- Maui Tacos
- Moe's Southwest Grill
- Panchero's Mexican Grill
- Qdoba Mexican Grill
- Rubio's Fresh Mexican Grill
- Salsarita's Fresh Cantina
- Sharky's Woodfired Mexican Grill

- SuperMex Restaurants
- Surf Taco
- Taco Bell
- Taco Bueno
- Taco Cabana
- Taco Casa
- Taco Del Mar
- Taco Fresco
- Taco John's
- Taco Mayo
- Taco Tico
- TacoTime
- The Taco Maker
- Tijuana Flats
- Tin Star
- Una Mas Mexican Grill
- Wahoo's Fish Taco
- Willy's Mexicana Grill

39.2 Market Resources

Top 50 Limited-Service Mexican Chains Restaurant Report, Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004.
(www.technomic.com)

LARGEST PIZZA CHAINS

40.1 Largest Chains

According to *Top 100 Limited-Service Pizza Chains Report*, by Technomic (www.technomic.com), the following are the largest limited-service pizza chains in the U.S.:

- 5 Buck Pizza
- Abby's Legendary Pizza
- Amato's Pizza
- Ameci Pizza and Pasta
- America's Incredible Pizza Company
- Angilo's Pizza
- Anthony's Pizza and Pasta
- BC Pizza
- Bellacino's Pizza & Grinders
- Blackjack Pizza
- Breadeaux Pizza
- Brixx Wood Fired Pizza
- Buck's Pizza
- Carbone's Pizzeria
- Cassano's
- Chanello's Pizza
- Chuck E. Cheese's
- CiCi's Pizza
- Cottage Inn Pizza
- CPK ASAP
- Dolly's Pizza
- Domino's Pizza
- Donatos Pizza
- East of Chicago Pizza
- Extreme Pizza
- Famous Famiglia
- Figaro's Italian Pizza
- Fox's Pizza Den
- Garlic Jim's Famous Gourmet Pizza
- Gatti's Pizza
- Gionino's Pizzeria
- Godfather's Pizza

- Greek's Pizzeria
- Gumby's Pizza & Wings
- Happy Joe's Pizza and Ice Cream Parlor
- Happy's Pizza
- Homemade Pizza Co.
- Hungry Howie's Pizza & Subs
- Imo's Pizza
- Izzy's Pizza Bar & Classic Buffet
- Jet's Pizza
- John's Incredible Pizza Company
- Ledo Pizza
- Little Caesars
- Mamma Ilardo's
- Marco's Pizza
- Mark's Pizzeria
- Mazzio's Italian Eatery
- Mellow Mushroom
- Me-N-Ed's Pizzeria
- Monical's Pizza Restaurant
- Monkey Joe's Parties and Play
- Mountain Mike's Pizza
- Mr. Jim's Pizza
- Nancy's
- New York Pizzeria
- Nick-N-Willy's Pizza
- Papa Gino's Pizzeria
- Papa John's
- Papa Murphy's Take 'N' Bake Pizza
- Papa Romano's
- Papa's Pizza-To-Go
- Pats Pizza Family Restaurants
- Paul Revere's Pizza International
- Peter Piper Pizza
- Pizza Boli's
- Pizza Factory
- Pizza Guy's
- Pizza Hut
- Pizza Inn
- Pizza Joe's
- Pizza Man
- Pizza Patrón
- Pizza Plus
- Pizza Pro
- Pizza Ranch

- Pizza Shoppe & Pub
- Pizzas of Eight
- Puccini's Smiling Teeth Pizza
- Pudge Bros. Pizza
- RedBrick Pizza
- Rocky Rococo
- Rosati's Pizza
- Round Table Pizza
- Samuel Mancino's Italian Eatery
- San Francisco Oven
- Sbarro
- Shakey's Pizza Parlors
- Simple Simon's Pizza
- Snappy Tomato Pizza
- Straw Hat Pizza
- The Loop Pizza Grill
- The Original Pizza Pan
- Toppers Pizza
- Villa Fresh Italian Kitchen
- Vocelli Pizza
- Westshore Pizza
- Wolfgang Puck Express
- Zeppe's Pizzeria
- zpizza

40.2 Market Resources

Top 100 Limited-Service Pizza Chains Report, Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)

LARGEST QUICK-SERVICE CHAINS

41.1 Top Chains

Based on data from Technomic (www.technomic.com), *QSR Magazine* (August 2013) ranked the largest quick-service restaurant (QSR) chains by systemwide sales as follows:

	Systemwide Sales	Sales Per Unit	Total Units (Yr. change)
• McDonald's:	\$35.60 billion	\$2.60 million	14,157 (59)
• Subway:	\$12.10 billion	\$ 481,000	25,549 (956)
• Starbucks:	\$10.60 billion	\$1.22 million	11,128 (341)
• Wendy's:	\$ 8.60 billion	\$1.48 million	5,817 (-34)
• Burger King:	\$ 8.59 billion	\$1.19 million	7,183 (-21)
• Taco Bell:	\$ 7.49 billion	\$1.36 million	5,262 (25)
• Dunkin' Donuts:	\$ 6.26 billion	\$ 857,400	7,306 (291)
• Pizza Hut:	\$ 5.67 billion	\$ 883,000	6,209 (156)
• Chick-fil-A:	\$ 4.62 billion	\$3.16 million	1,683 (77)
• KFC:	\$ 4.46 billion	\$ 957,000	4,556 (-162)
• Panera Bread:	\$ 3.86 billion	\$2.43 million	1,652 (111)
• Sonic Drive-Ins:	\$ 3.79 billion	\$1.07 million	3,556 (-5)
• Domino's Pizza:	\$ 3.50 billion	\$ 710,200	4,928 (21)
• Jack in the Box:	\$ 3.08 billion	\$1.38 million	2,250 (29)
• Arby's:	\$ 2.99 billion	\$ 993,200	3,354 (-83)
• Chipotle Mexican Grill:	\$ 2.73 billion	\$2.11 million	1,410 (180)
• Papa John's:	\$ 2.40 billion	\$ 829,000	3,131 (130)
• Dairy Queen:	\$ 2.30 billion	\$ 545,000	4,462 (-23)
• Popeyes Louisiana Kitchen:	\$ 2.25 billion	\$1.24 million	1,679 (69)
• Hardee's:	\$ 1.90 billion	\$1.15 million	1,703 (8)
• Panda Express:	\$ 1.80 billion	\$1.24 million	1,486 (119)
• Little Caesars:	\$ 1.68 billion	\$ 465,000	3,725 (207)
• Whataburger:	\$ 1.48 billion	\$1.99 million	740 (12)
• Carl's Jr.:	\$ 1.40 billion	\$1.47 million	1,124 (8)
• Jimmy John's:	\$ 1.26 billion	\$ 878,800	1,560 (299)
• Five Guys Burgers & Fries:	\$ 1.08 billion	\$1.05 million	1,105 (204)
• Zaxby's:	\$ 979,300	\$1.77 million	565 (25)
• Church's Chicken:	\$ 869,900	\$ 706,500	1,202 (10)
• Bojangles':	\$ 864,500	\$1.72 million	536 (30)

• Steak 'n Shake:	\$ 857,500	\$1.70 million	501 (10)
• Culver's:	\$ 838,800	\$1.84 million	472 (28)
• Quiznos:	\$ 838,000	\$ 345,000	2,353 (-150)
• Papa Murphy's:	\$ 738,900	\$ 574,900	1,329 (79)
• Long John Silver's:	\$ 723,000	\$ 794,000	911 (-21)
• Checkers/Rally's:	\$ 696,900	\$ 903,400	776 (-3)
• White Castle:	\$ 618,500	\$1.28 million	406 (9)
• Del Taco:	\$ 607,900	\$1.10 million	551 (19)
• Qdoba Mexican Grill:	\$ 583,200	\$ 966,000	627 (44)
• Jason's Deli:	\$ 578,900	\$2.56 million	245 (10)
• Krispy Kreme:	\$ 569,400	\$2.43 million	239 (9)
• El Pollo Loco:	\$ 563,000	\$1.48 million	397 (3)
• Boston Market:	\$ 559,000	\$1.18 million	469 (-12)
• Tim Hortons:	\$ 532,200	\$1.10 million	804 (90)
• In-N-Out Burger:	\$ 528,500	\$1.93 million	280 (14)
• Baskin-Robbins:	\$ 510,900	\$ 207,100	2,463 (-30)
• CiCi's Pizza:	\$ 505,000	\$ 915,000	550 (-23)
• Captain D's:	\$ 467,100	\$ 903,000	517 (-2)
• Moe's Southwest Grill:	\$ 452,000	\$1.10 million	482 (43)
• Wingstop:	\$ 450,900	\$ 902,000	533 (46)
• Jamba Juice:	\$ 450,000	\$ 714,700	774 (40)

41.2 Largest QSR Chains By Category

Ranked by systemwide sales, the largest QSR chains are as follows (source: *QSR Magazine*):

Asian

- Panda Express: \$ 1.80 billion

Burgers

- McDonald's: \$35.60 billion
- Wendy's: \$ 8.60 billion
- Burger King: \$ 8.59 billion
- Sonic Drive-In: \$ 3.79 billion
- Jack in the Box: \$ 3.08 billion
- Dairy Queen: \$ 2.30 billion
- Hardee's: \$ 1.90 billion
- Whataburger: \$ 1.48 billion
- Carl's Jr.: \$ 1.40 billion
- Five Guys Burgers & Fries: \$ 1.08 billion
- Steak-N-Shake: \$ 858 million
- Culver's: \$ 839 million
- Checkers/Rally's: \$ 697 million

- White Castle: \$ 619 million
- In-N-Out Burger: \$ 529 million

Chicken

- Chick-fil-A: \$ 4.62 billion
- KFC: \$ 4.46 billion
- Popeyes Louisiana Chicken: \$ 2.25 billion
- Zaxby's: \$ 979 million
- Church's Chicken: \$ 870 million
- Bojangles': \$ 865 million
- El Pollo Loco: \$ 563 million
- Boston Market: \$ 559 million
- Wingstop: \$ 451 million

Mexican

- Taco Bell: \$ 7.48 billion
- Chipotle Mexican Grill: \$ 2.73 billion
- Del Taco: \$ 608 million
- Qdoba Mexican Grill: \$ 583 million
- Moe's Southwest Grill: \$ 452 million

Pizza/Pasta

- Pizza Hut: \$ 5.67 billion
- Domino's Pizza: \$ 3.50 billion
- Papa John's: \$ 2.42 billion
- Little Caesars: \$ 1.68 billion
- Papa Murphy's: \$ 738 million
- CiCi's Pizza: \$ 505 million

Sandwich

- Subway: \$12.10 billion
- Panera Bread: \$ 3.86 billion
- Arby's: \$ 3.00 billion
- Jimmy John's: \$ 1.26 billion
- Quiznos: \$ 838 million
- Jason's Deli: \$ 579 million

Seafood

- Long John Silver's: \$ 723 million
- Captain D's: \$ 467 million

Snack

- Starbucks: \$10.60 billion
- Dunkin' Donuts: \$ 6.26 billion
- Krispy Kreme: \$ 569 million
- Tim Hortons: \$ 532 million
- Baskin-Robbins: \$ 510 million
- Jamba Juice: \$ 450 million

LARGEST SANDWICH CHAINS

42.1 Largest Chains

According to *Top 100 Limited-Service Sandwich Chains Report*, by Technomic (www.technomic.com), the following are the largest limited-service sandwich chains in the U.S.:

- Al's Beef
- Andy's Burgers Shakes & Fries
- Apple Spice Junction
- Arby's
- Bain's Deli
- Baker Bros. American Deli
- Big Town Hero
- Biscuitville
- Blimpie Subs & Salads
- Boeeymonger Deli
- Buona Beef
- Capriotti's Sandwich Shop
- Charley's Grilled Subs
- City Bites
- Cosí
- Cousins Subs
- Crazy Bowls & Wraps
- D.P. Dough
- D'Angelo Grilled Sandwiches
- El Meson Sandwiches
- Elliott's Off Broadway Deli
- Erbert & Gerbert's
- Erik's DeliCafe
- Extreme Pita
- Firehouse Subs
- Fresh City
- Gandolfo's Deli
- Gold Coast Dogs
- Great Wraps
- Groucho's Deli
- Heidi's Brooklyn Deli

- Hogi Yogi
- Hot Dog on a Stick
- Jason's Deli
- Jerry's Subs & Pizza
- Jersey Mike's Subs
- Jimmy John's Gourmet Sandwich Shop
- Jody Maroni's Sausage Kingdom
- Jreck Subs
- Larry's Giant Subs
- Lenny's Sub Shop
- Lion's Choice
- Maid-Rite
- McAlister's Deli
- Miami Subs Grill
- Milios Sandwiches
- Mr. Goodcents Subs & Pastas
- Mr. Hero
- Mr. Pickle's Sandwich Shop
- Mr. Pita
- Mr. Subb
- Mr. Submarine's
- Murphy's Deli
- Nathan's Famous
- Obee's
- Organic To Go
- Penn Station East Coast Subs
- Pepperjax Grill
- Philly Connection
- Pita Pit
- Planet Sub
- Pockets
- Port of Subs
- Portillo's Hot Dogs
- Potbelly Sandwich Works
- Pret A Manger
- Quiznos
- Rio Wraps Southwestern Grill
- Roly Poly
- Roy Rogers Restaurants
- Runza
- Schlotzsky's
- Sheetz
- Silver Mine Subs
- Smiling Moose Deli

- Sneaky Pete's Hot Dogs
- Sobik's Subs
- Spicy Pickle
- Steak Escape
- Sub Station II
- Submarina
- Subway
- Sweet Peppers Deli
- Tacone Flavor Grill
- Texadelphia
- The Great Steak & Potato Co.
- Thundercloud Subs
- Togo's Sandwiches
- TooJay's Original Gourmet Deli
- Tubby's Grilled Submarines
- W.G. Grinders
- Wall Street Deli
- Which Wich?
- wichcraft
- Wienerschnitzel
- WindMill Hot Dog
- Zero's Subs
- Zöes Kitchen

42.2 Market Resources

Top 100 Limited-Service Sandwich Chains Report, Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004.
(www.technomic.com)

TOP 200 CHAINS

43.1 Overview

Nation's Restaurant News annually ranks the largest restaurant chains based on U.S. systemwide sales. Systemwide sales include sales from both corporate-owned and franchised locations.

43.2 Largest Chains

The largest restaurant chains, ranked by U.S. systemwide sales, are as follows (source: *Nation's Restaurant News*, June 2013):

	Sales	Units
• McDonald's:	\$35.59 billion	14,157
• Subway:	\$12.12 billion	25,549
• Starbucks Coffee:	\$ 9.27 billion	11,013
• Burger King:	\$ 8.59 billion	7,183
• Wendy's:	\$ 8.22 billion	5,817
• Taco Bell:	\$ 7.50 billion	5,695
• Dunkin' Donuts:	\$ 6.26 billion	7,306
• Pizza Hut:	\$ 5.70 billion	7,756
• Chick-fil-A:	\$ 4.56 billion	1,669
• Applebee's Neighborhood Grill & Bar:	\$ 4.50 billion	1,885
• KFC:	\$ 4.50 billion	4,618
• Sonic Drive-In:	\$ 3.79 billion	3,556
• Olive Garden:	\$ 3.65 billion	817
• Panera Bread:	\$ 3.63 billion	1,534
• Chili's Grill & Bar:	\$ 3.56 billion	1,268
• Domino's Pizza:	\$ 3.55 billion	4,928
• Jack in the Box:	\$ 3.08 billion	2,250
• Arby's:	\$ 2.99 billion	3,354
• Little Caesars Pizza:	\$ 2.90 billion	3,673
• Dairy Queen:	\$ 2.84 billion	4,462
• Chipotle Mexican Grill:	\$ 2.72 billion	1,398
• IHOP:	\$ 2.65 billion	1,537
• Red Lobster:	\$ 2.54 billion	681
• Buffalo Wild Wings Grill & Bar:	\$ 2.46 billion	884
• Papa John's Pizza:	\$ 2.40 billion	3,131

• Outback Steakhouse:	\$ 2.39 billion	770
• Denny's:	\$ 2.38 billion	1,590
• Cracker Barrel Old Country Store:	\$ 2.01 billion	616
• Popeyes Louisiana Kitchen:	\$ 1.93 billion	1,679
• Hardee's:	\$ 1.89 billion	1,703
• 7-Eleven:	\$ 1.89 billion	6,800
• T.G.I. Friday's:	\$ 1.82 billion	543
• Golden Corral:	\$ 1.78 billion	488
• Panda Express:	\$ 1.78 billion	1,514
• The Cheesecake Factory:	\$ 1.60 billion	162
• Texas Roadhouse:	\$ 1.53 billion	388
• Whataburger:	\$ 1.48 billion	740
• Carl's Jr.:	\$ 1.41 billion	1,124
• Ruby Tuesday:	\$ 1.33 billion	746
• Red Robin Gourmet Burgers & Spirits:	\$ 1.30 billion	455
• Jimmy John's Gourmet Sandwiches:	\$ 1.26 billion	1,561
• LongHorn Steakhouse:	\$ 1.21 billion	422
• Wawa:	\$ 1.13 billion	606
• Five Guys Burgers and Fries:	\$ 1.08 billion	1,105
• Waffle House:	\$ 1.01 billion	1,670
• Bob Evans Restaurants:	\$ 980 million	565
• Zaxby's:	\$ 980 million	565
• P.F. Chang's China Bistro:	\$ 925 million	207
• Church's Chicken:	\$ 869 million	1,202
• Bojangles' Famous Chicken 'n Biscuits:	\$ 865 million	536
• Culver's:	\$ 839 million	472
• Steak 'n Shake:	\$ 837 million	497
• Hooters:	\$ 836 million	372
• Papa Murphy's Take 'N' Bake Pizza:	\$ 734 million	1,329
• Long John Silver's:	\$ 732 million	911
• BJ's Rest. & Brewery/Brewhouse/Pizza & Grill:	\$ 708 million	130
• Logan's Roadhouse:	\$ 702 million	246
• Carrabba's Italian Grill:	\$ 697 million	235
• California Pizza Kitchen:	\$ 695 million	223
• Perkins Restaurant and Bakery:	\$ 658 million	400
• In-N-Out Burger:	\$ 651 million	280
• Quiznos Sub:	\$ 617 million	1,912
• Del Taco:	\$ 608 million	551
• El Pollo Loco:	\$ 607 million	398
• Circle K:	\$ 607 million	3,876
• Costco:	\$ 597 million	425
• Qdoba Mexican Grill:	\$ 583 million	435
• Jason Deli:	\$ 579 million	242
• Krispy Kreme Doughnuts:	\$ 569 million	239

• Casey's General Stores:	\$ 564 million	1,739
• Boston Market:	\$ 559 million	469
• Cheddars:	\$ 546 million	129
• Tim Hortons:	\$ 539 million	804
• O'Charley's:	\$ 531 million	213
• White Castle:	\$ 521 million	406
• Ruth's Chris Steak House:	\$ 512 million	118
• Bonefish Grill:	\$ 512 million	174
• Baskin-Robbins:	\$ 510 million	2,463
• Target Cafe (Target Stores):	\$ 499 million	1,739
• Famous Dave's:	\$ 497 million	188
• Sheetz:	\$ 487 million	429
• CiCi's Pizza:	\$ 473 million	519
• Jamba Juice:	\$ 473 million	774
• Captain D's Seafood:	\$ 467 million	517
• Einstein Bros. Bagels:	\$ 455 million	685
• Moe's Southwest Grill:	\$ 452 million	487
• Friendly's Ice Cream:	\$ 451 million	365
• Wingstop:	\$ 451 million	533
• Checkers:	\$ 446 million	488
• McAllister's Deli:	\$ 419 million	312
• Krystal:	\$ 414 million	350
• Joe's Crab Shack:	\$ 413 million	129
• Auntie Anne's Hand-Rolled Soft Pretzels:	\$ 410 million	997
• Romano's Macaroni Grill:	\$ 404 million	191
• Sbarro:	\$ 400 million	591
• Big Boy Restaurants/Frisch's Big Boy:	\$ 395 million	238
• On the Border Mexican Grill & Cantina:	\$ 394 million	147
• Maggiano's Little Italy:	\$ 392 million	44
• Chuck E. Cheese's:	\$ 390 million	535
• Firehouse Subs:	\$ 380 million	569
• Round Table Pizza:	\$ 363 million	437
• Noodles & Company:	\$ 356 million	327
• Cold Stone Creamery:	\$ 354 million	1,031
• Mimi's Café:	\$ 351 million	145
• Au Bon Pain:	\$ 339 million	197
• Jersey Mike's Subs:	\$ 345 million	584
• The Capital Grille:	\$ 332 million	49
• Taco John's:	\$ 324 million	401
• Yard House:	\$ 324 million	42
• Pei Wei Asian Diner:	\$ 317 million	185
• Village Inn:	\$ 317 million	206
• Shoney's:	\$ 308 million	199
• Uno Chicago Grill/Pizzeria Uno:	\$ 301 million	133

• Barnes & Noble Cafe:	\$ 298 million	677
• Corner Bakery Cafe:	\$ 296 million	147
• Dave & Buster's:	\$ 293 million	60
• HomeTown Buffet:	\$ 291 million	111
• Hungry Howie's Pizza:	\$ 291 million	548
• Taco Cabana:	\$ 288 million	168
• Sam's Café:	\$ 279 million	609
• Ninety Nine Restaurant & Pub:	\$ 278 million	105
• Schlotzky's Deli:	\$ 276 million	340
• Ryan's Grill Buffett & Bakery:	\$ 276 million	130
• Raising Cane's Chicken Fingers:	\$ 274 million	147
• Caribou Coffee:	\$ 273 million	527
• Benihana of Tokyo:	\$ 268 million	70
• Potbelly Sandwich Works/Shop:	\$ 262 million	257
• Carino's Italian:	\$ 261 million	123
• Dickey's Barbecue Pit:	\$ 259 million	389
• Fleming's Prime Steakhouse & Wine Bar:	\$ 252 million	65
• Fuddruckers:	\$ 250 million	176
• Rally's Hamburgers:	\$ 250 million	288
• Sizzler:	\$ 249 million	152
• Sonny's Real Pit Bar-B-Q:	\$ 248 million	126
• McCormick & Schmick's:	\$ 247 million	65
• Old Country Buffet:	\$ 247 million	93
• Buca di Beppo:	\$ 246 million	93
• Godfather's Pizza:	\$ 243 million	616
• Brio Tuscan Grille:	\$ 241 million	54
• Baja Fresh Mexican Grill:	\$ 240 million	211
• Morton's, The Steakhouse:	\$ 238 million	63
• Huddle House:	\$ 237 million	396
• Houlihan's:	\$ 234 million	81
• Braum's Ice Cream and Dairy Stores:	\$ 232 million	284
• Old Chicago Pizza & Tap Room:	\$ 232 million	95
• Pollo Tropical Chicken on the Grill:	\$ 231 million	94
• Charley's Grilled Subs:	\$ 231 million	414
• Luby's Cafeteria:	\$ 229 million	92
• Fazolis:	\$ 225 million	216
• Portillo's Hot Dogs:	\$ 225 million	35
• The Melting Pot:	\$ 225 million	136
• Wienerschnitzel:	\$ 221 million	324
• Rainforest Cafe:	\$ 217 million	25
• Johnny Rockets:	\$ 215 million	214
• Legal Sea Foods:	\$ 214 million	31
• Champps Americana:	\$ 211 million	52
• Bruegger's Bagel Bakery:	\$ 211 million	291

• Taco Bueno:	\$ 209 million	175
• Sweet Tomatoes:	\$ 208 million	88
• Beef 'O' Brady's Family Sports Pub:	\$ 207 million	213
• Stripes:	\$ 207 million	559
• Sarku Japan/Sushi Bar/Teriyaki & Sushi Express:	\$ 205 million	232
• Bertucci's Italian Restaurant:	\$ 202 million	92
• Saltgrass Steak House:	\$ 202 million	48
• Rubio's Fresh Mexican Grill:	\$ 199 million	196
• A&W All American Food:	\$ 197 million	740
• Marco's Pizza:	\$ 197 million	334
• Hard Rock Cafe:	\$ 186 million	43
• Ponderosa Steakhouse:	\$ 180 million	127
• Smoothie King:	\$ 180 million	533
• Lone Star Steakhouse & Saloon:	\$ 179 million	83
• Smokey Bones Bar & Fire Grill:	\$ 176 million	66
• Bahama Breeze:	\$ 175 million	33
• Houston's:	\$ 174 million	20
• Chuy's:	\$ 173 million	39
• Bubba Gump Shrimp Co.:	\$ 173 million	27
• Eat'n Park:	\$ 172 million	71
• Elephant Bar Restaurant:	\$ 172 million	46
• Marie Callender's Restaurant & Bakery:	\$ 167 million	78
• Claim Jumper:	\$ 166 million	38
• Donatos Pizza/Pizzeria:	\$ 166 million	157
• Bravo! Cucina Italiana:	\$ 166 million	48
• Seasons 52:	\$ 165 million	31
• Peet's Coffee & Tea:	\$ 163 million	199
• J. Alexander's:	\$ 163 million	33
• Smashburger:	\$ 162 million	186
• Shari's Restaurants:	\$ 159 million	100
• Chevys Fresh Mex:	\$ 156 million	58
• Cosi:	\$ 154 million	122
• Bar Louie:	\$ 151 million	68
• Tropical Smoothie Café:	\$ 150 million	329
• Papa Gino's:	\$ 148 million	160
• Coco's:	\$ 144 million	120
• Quaker State & Lube:	\$ 143 million	64
• Black Angus Steakhouse:	\$ 143 million	45
• Piccadilly Cafeteria:	\$ 143 million	73
• Togo's Eatery/Sandwiches:	\$ 139 million	243
• LaRosa's Pizzeria:	\$ 138 million	65
• Grand Lux Cafe:	\$ 136 million	14
• Max & Erma's:	\$ 134 million	72

43.3 Market Resources

Nation's Restaurant News, 1166 Avenue of the Americas, 10th Floor, New York, NY 10036. (212) 204-4200. (www.nrn.com)

TOP CHAINS BY SEGMENT

44.1 Overview

In its annual assessment of the Top 200 restaurants chains, *Nation's Restaurant News* categorizes restaurant segments as follows:

- Bakery-Cafe
- Buffet
- Burgers (Limited-Service)
- Casual-Dining
- Chicken
- Coffee/Snack
- Convenience Stores
- Family-Dining
- Limited-Service
- Mexican (Limited-Service)
- Pizza
- Sandwiches (Limited-Service)
- Specialty

44.2 Segment Assessment

The following are the largest restaurant chains by segment (source: *Nation's Restaurant News*, June 2013):

Bakery-Cafe

	Systemwide Sales	Units
• Panera Bread:	\$ 3.63 billion	1,534
• Tim Hortons:	\$ 539 million	804
• Einstein Bros. Bagels:	\$ 455 million	685
• Au Bon Pain:	\$ 339 million	192
• Corner Bakery Café:	\$ 296 million	147
• Bruegger's Bagel Bakery:	\$ 211 million	291

Buffet

• Golden Corral:	\$ 1.78 billion	482
• Ryan's Grill, Buffet & Bakery:	\$ 376 million	130
• HomeTown Buffet:	\$ 291 million	111
• Sizzler:	\$ 249 million	152

• Old Country Buffet:	\$ 247 million	93
• Sweet Tomatoes:	\$ 208 million	88
• Ponderosa Steakhouse:	\$ 180 million	127

Burgers

• McDonald's:	\$35.59 billion	14,157
• Burger King:	\$ 8.59 billion	7,183
• Wendy's:	\$ 8.22 billion	5,817
• Sonic Drive-In:	\$ 3.79 billion	3,556
• Jack in the Box:	\$ 3.08 billion	2,250
• Dairy Queen:	\$ 2.84 billion	4,462
• Hardee's:	\$ 1.90 billion	1,703
• Whataburger:	\$ 1.48 billion	740
• Carl's Jr.:	\$ 1.41 billion	1,124
• Five Guys Burgers and Fries:	\$ 1.08 billion	1,105
• Culver's:	\$ 839 million	472
• Steak 'n Shake:	\$ 837 million	497
• In-N-Out Burger:	\$ 651 million	280
• White Castle:	\$ 521 million	406
• Checkers:	\$ 446 million	488
• Krystal:	\$ 414 million	350
• Fuddruckers:	\$ 250 million	176
• Rally's Hamburgers:	\$ 250 million	288
• Braum's Ice Cream and Dairy Stores:	\$ 232 million	284
• Johnny Rockets:	\$ 215 million	214
• A&W All American Food:	\$ 197 million	740
• Smashburger:	\$ 162 million	186

Casual-Dining

• Applebee's Neighborhood Grill & Bar:	\$ 4.50 billion	1,885
• Olive Garden:	\$ 3.65 billion	817
• Chili's Grill & Bar:	\$ 3.56 billion	1,283
• Red Lobster:	\$ 2.54 billion	681
• Buffalo Wild Wings Grill & Bar:	\$ 2.46 billion	884
• Outback Steakhouse:	\$ 2.39 billion	770
• T.G.I. Friday's:	\$ 1.82 billion	543
• The Cheesecake Factory:	\$ 1.60 billion	162
• Texas Roadhouse:	\$ 1.53 billion	388
• Ruby Tuesday:	\$ 1.33 billion	746
• Red Robin Gourmet Burgers & Spirits:	\$ 1.30 billion	455
• LongHorn Steakhouse:	\$ 1.22 billion	422
• P.F. Chang's China Bistro:	\$ 925 million	207
• Hooters:	\$ 836 million	372
• BJ's Rest. & Brewery/Brewhouse/Pizza & Grill:	\$ 708 million	130

• Logan's Roadhouse:	\$ 702 million	246
• Carrabba's Italian Grill:	\$ 697 million	235
• California Pizza Kitchen:	\$ 695 million	223
• Cheddars:	\$ 546 million	129
• O'Charley's:	\$ 531 million	213
• Ruth's Chris Steak House:	\$ 512 million	118
• Bonefish Grill:	\$ 512 million	174
• Famous Dave's:	\$ 497 million	188
• Joe's Crab Shack:	\$ 413 million	129
• Romano's Macaroni Grill:	\$ 404 million	191
• On the Border Mexican Grill & Cantina:	\$ 394 million	147
• Maggiano's Little Italy:	\$ 392 million	44
• Mimi's Cafe:	\$ 351 million	145
• The Capital Grille:	\$ 332 million	49
• Yard House:	\$ 324 million	42
• Uno Chicago Grill/Pizzeria Uno:	\$ 301 million	133
• Dave & Buster's:	\$ 293 million	60
• Ninety Nine Restaurant & Pub:	\$ 278 million	105
• Benihana of Tokyo:	\$ 268 million	70
• Carino's Italian:	\$ 261 million	123
• Fleming's Prime Steakhouse & Wine Bar:	\$ 252 million	65
• McCormick & Schmick's:	\$ 247 million	65
• Buca di Beppo:	\$ 246 million	93
• Brio Tuscan Grille:	\$ 241 million	54
• Morton's The Steakhouse:	\$ 238 million	63
• Houlihan's:	\$ 234 million	81
• Old Chicago Pizza & Tap Room:	\$ 232 million	95
• The Melting Pot:	\$ 225 million	136
• Rainforest Cafe:	\$ 217 million	25
• Legal Sea Foods:	\$ 214 million	31
• Champps Americana:	\$ 211 million	52
• Beef 'O' Brady's Family Sports Pub:	\$ 207 million	213
• Bertucci's Italian Restaurant:	\$ 202 million	92
• Saltgrass Steakhouse:	\$ 202 million	48
• Hard Rock Cafe:	\$ 186 million	43
• Lone Star Steakhouse & Saloon:	\$ 179 million	83
• Smokey Bones Bar & Fire Grill:	\$ 176 million	66
• Bahama Breeze:	\$ 175 million	33
• Houston's:	\$ 174 million	20
• Chuy's:	\$ 173 million	39
• Bubba Gump Shrimp Co.:	\$ 173 million	27
• Elephant Bar Restaurant:	\$ 172 million	46
• Marie Callender's Restaurant & Bakery:	\$ 167 million	78
• Claim Jumper:	\$ 166 million	38

• Bravo! Cucina Italiana:	\$ 166 million	48
• Seasons 52:	\$ 165 million	31
• J. Alexander's:	\$ 163 million	33
• Chevys Fresh Mex:	\$ 156 million	58
• Bar Louie:	\$ 151 million	68
• Quaker State & Lube:	\$ 143 million	64
• Black Angus Steakhouse:	\$ 143 million	45
• Grand Lux Cafe:	\$ 136 million	14
• Max & Erma's:	\$ 134 million	72

Chicken

• Chick-fil-A:	\$ 4.56 billion	1,669
• KFC:	\$ 4.50 billion	4,618
• Popeyes Louisiana Kitchen:	\$ 1.93 billion	1,679
• Zaxby's:	\$ 979 million	565
• Church's Chicken:	\$ 869 million	1,202
• Bojangles' Famous Chicken 'n Biscuits:	\$ 865 million	536
• El Pollo Loco:	\$ 607 million	398
• Boston Market:	\$ 559 million	469
• Wingstop:	\$ 451 million	533
• Pollo Tropical Chicken on the Grill:	\$ 231 million	94

Coffee/Snack

• Starbucks Coffee:	\$ 9.28 billion	11,013
• Dunkin' Donuts:	\$ 6.26 billion	7,306
• Krispy Kreme Doughnuts:	\$ 569 million	239
• Baskin-Robbins:	\$ 510 million	2,463
• Jamba Juice:	\$ 473 million	774
• Auntie Anne's Hand-Rolled Soft Pretzels:	\$ 410 million	997
• Cold Stone Creamery:	\$ 354 million	1,031
• Caribou Coffee:	\$ 273 million	527
• Smoothie King:	\$ 180 million	533
• Peet's Coffee & Tea:	\$ 163 million	199
• Tropical Smoothie & Cafe:	\$ 150 million	329

Convenience Stores

• 7-Eleven:	\$ 1.89 billion	6,800
• Wawa:	\$ 1.13 billion	606
• Circle K:	\$ 607 million	3,876
• Casey's General Stores:	\$ 564 million	1,739
• Sheetz:	\$ 487 million	429

Family-Dining

• IHOP:	\$ 2.65 billion	1,537
• Denny's:	\$ 2.38 billion	1,590
• Cracker Barrel Old Country Store:	\$ 2.01 billion	616
• Waffle House:	\$ 1.01 billion	1,670
• Bob Evans Restaurants:	\$ 980 million	565
• Perkins Restaurant and Bakery:	\$ 658 million	400
• Friendly's Ice Cream:	\$ 451 million	365
• Big Boy Restaurants/Frisch's Big Boy:	\$ 395 million	238
• Steak 'n Shake:	\$ 791 million	489
• Village Inn:	\$ 317 million	206
• Shoney's:	\$ 308 million	199
• Sonny's Real Pit Bar-B-Q:	\$ 248 million	126
• Huddle House:	\$ 237 million	396
• Eat'n Park:	\$ 172 million	71
• Shari's Restaurants:	\$ 159 million	100
• Coco's:	\$ 144 million	120

Mexican

• Taco Bell:	\$ 7.50 billion	5,695
• Chipotle Mexican Grill:	\$ 2.72 billion	1,398
• Del Taco:	\$ 608 million	551
• Qdoba Mexican Grill:	\$ 583 million	627
• Moe's Southwest Grill:	\$ 452 million	487
• Taco John's:	\$ 324 million	401
• Taco Cabana:	\$ 288 million	168
• Baja Fresh Mexican Grill:	\$ 240 million	211
• Taco Bueno:	\$ 209 million	175
• Rubio's Fresh Mexican Grill:	\$ 199 million	196

Pizza

• Pizza Hut:	\$ 5.70 billion	7,756
• Domino's Pizza:	\$ 3.55 billion	4,928
• Little Caesars Pizza:	\$ 2.90 billion	3,673
• Papa John's Pizza:	\$ 2.40 billion	3,131
• Papa Murphy's Take 'N' Bake Pizza:	\$ 734 million	1,329
• CiCi's Pizza:	\$ 473 million	519
• Chuck E. Cheese's:	\$ 390 million	535
• Round Table Pizza:	\$ 363 million	437
• Hungry Howie's Pizza:	\$ 291 million	548
• Godfather's Pizza:	\$ 243 million	616
• Marco's Pizza:	\$ 197 million	334
• Donatos Pizza:	\$ 166 million	157
• Papa Gino's:	\$ 148 million	160
• LaRosa's Pizzeria:	\$ 130 million	65

Sandwiches

• Subway:	\$12.12 billion	25,549
• Arby's:	\$ 2.99 billion	3,354
• Jimmy John's Gourmet Sandwiches:	\$ 1.26 billion	1,561
• Quiznos Sub:	\$ 617 million	1,912
• Jason Deli:	\$ 579 million	242
• McAlister's Deli:	\$ 419 million	312
• Firehouse Subs:	\$ 380 million	569
• Jersey Mike's Subs:	\$ 334 million	584
• Schlotzsky's Deli:	\$ 276 million	340
• Potbelly Sandwich Works:	\$ 262 million	257
• Charley's Grilled Subs:	\$ 231 million	414
• Così:	\$ 154 million	122
• Togo's Eatery/Sandwiches:	\$ 139 million	243

Specialty

• Panda Express:	\$ 1.78 billion	1,514
• Long John Silver's:	\$ 732 million	911
• Captain D's Seafood:	\$ 467 million	517
• Sbarro:	\$ 400 million	591
• Noodles & Company:	\$ 356 million	327
• Pei Wei Asian Diner:	\$ 317 million	185
• Dickey's Barbeque Pit:	\$ 259 million	389
• Fazooli's:	\$ 225 million	216
• Portillo's Hot Dogs:	\$ 225 million	35
• Wienerschnitzel:	\$ 221 million	324
• Sarku Japan/Sushi Bar/Teriyaki & Sushi Express:	\$ 205 million	232

44.3 Market Resources

Nation's Restaurant News, 1166 Avenue of the Americas, 10th Floor, New York, NY 10036. (212) 204-4200. (www.nrn.com)

TOP FOODSERVICE DISTRIBUTORS

45.1 Ranking By Annual Sales

The largest foodservice distributors, ranked by annual sales, are as follows (sources: corporate filings and Technomic [www.technomic.com]):

• Sysco Corp.:	\$44.41 billion
• US Foods:	\$18.86 billion
• PFGC:	\$12.50 billion (est.)
• Gordon Food Service:	\$10.00 billion (est.)
• Reinhart Foodservice:	\$ 4.54 billion
• Maines Paper & Food Service:	\$ 3.08 billion (est.)
• Ben E. Keith Company:	\$ 3.08 billion (est.)
• Services Group of America:	\$ 2.75 billion (est.)
• Shamrock Foods Co.:	\$ 2.11 billion (est.)
• Labatt Food Service:	\$ 1.00 billion (est.)
• Cheney Brothers Inc.:	\$ 1.00 billion (est.)
• Glazier Foods:	\$ 541 million
• Merchants Foodservice:	\$ 375 million (est.)

45.2 Consolidation

In January 2014, an \$8.2 billion merger of Sysco Corp. and US Foods, the two largest foodservice distributors, was announced.

“Sysco and US Foods arguably are the only two foodservice distributors on a national scale, and the national loss of competition might weaken the negotiating power of a restaurant chain with national aspirations of its own.”

Nation’s Restaurant News, 1/13/14

Reinhart Foodservice recently acquired Agar Supply Co. Inc. PFGC recently acquired Institution Food House (IFH).

45.3 Market Resources

Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606.
(312) 876-0004. (www.technomic.com)

TOP RESTAURANT FRANCHISEES

46.1 Market Leaders

Annually, franchising.com compiles a list of the largest multi-unit franchise companies. Based on total unit count and brands in operation, the following were the Top Restaurant Franchisees in 2013:

- NPC International (1,230): KFC, Pizza Hut, Taco Bell
- Target Corp. (1,167): Cold Stone Creamery, Jamba Juice, Pizza Hut
- Carrols Group (572): Burger King
- Flynn Restaurant Group (511): Applebee's, Pizza Hut, Taco Bell
- Aramark (473): Beef 'O' Brady's Family Sports Pub, Ben & Jerry's Scoop Shop, Blimpie, Chick-fil-A, Chili's Grill & Bar/Chili's Too, Cold Stone Creamery, Cosi, Denny's, Dunkin' Donuts, Einstein Bros. Bagels, Freshii, IHOP, Jack in the Box, Jamba Juice, KFC, McAlister's Deli, Moe's Southwest Grill, Mooyah Burgers & Fries, Noble Roman's Pizza, Panda Express, Papa John's Pizza, Pinkberry, Pizza Hut, Qdoba Mexican Grill, Quiznos, Raising Cane's Chicken Fingers, Round Table Pizza, Salad Creations, Sbarro, Seattle's Best Coffee, Subway, Taco Bell, The Extreme Pita, Tim Hortons, Togo's, Wendy's, Which Wich?
- HMSHost Corp. (470): Baja Fresh, Blimpie, Burger King, Chick-fil-A, Chili's Grill & Bar/Chili's Too, Cinnabon, Cold Stone Creamery, Dickey's Barbecue Pit, Dunn Bros Coffee, Einstein Bros. Bagels, Famous Famiglia, Godfather's Pizza, Gordon Biersch Brewery, Great Steak & Potato Company, Häagen-Dazs, Johnny Rockets, Kelly's Cajun Grill, KFC, Krispy Kreme Doughnuts, La Salsa, MNG by Mango, Moe's Southwest Grill, Nathan's Famous, Pinkberry, Pizza Hut, Popeyes Louisiana Kitchen, Qdoba Mexican Grill, Quiznos, Ranch*1, Salsarita's, Sbarro, Smashburger, Sonny Bryan's Smokehouse, Subway, T.G.I. Friday's, TCBY, The Great American Bagel, Tony Roma's Pizza, Villa Pizza, Yeung's Lotus Express
- Army & Air Force Exchange Services (425): Arby's, Blimpie, Burger King, Captain D's, Charley's Grilled Subs, Church's Chicken, Cinnabon, Einstein Bros. Bagels, Godfather's Pizza, Pizza Hut, Popeyes Louisiana Kitchen, Subway, Taco John's, Wing Zone
- Heartland Food Corp. (404): Burger King

- Harman Management Corp. (403): A&W, KFC, Long John Silver's, Pizza Hut, Taco Bell
- Rottinghaus Company (368): Subway
- Sodexo (353): A&W, Baja Fresh, Blimpie, Burger King, Carl's Jr., Chester's, Chick-fil-A, Denny's, Einstein Bros. Bagels, Godfather's Pizza, Hot Stuff Foods, Jamba Juice, Long John Silver's, McAlister's Deli, Nathan's Famous, NrGize Lifestyle Cafe, Papa John's Pizza, Pizza Hut, Quiznos, Seattle's Best Coffee, Subway, Taco Bell, Tim Hortons, Wow Cafe & Wingery
- Pilot Travel Centers (325): Arby's, Carvel, Cinnabon, Dairy Queen/DQ, Hot Stuff Foods, Huddle House, KFC, Moe's Southwest Grill, Pizza Hut, Subway, Wendy's
- Tacala/Boom Foods (303): KFC, Pizza Hut, Sonic Drive-In, Taco Bell,
- Boddie-Noell Enterprises (299): Hardee's
- Strategic Restaurants Acquisition Corp. (292): Burger King
- ADF Companies (287): Pizza Hut, Taco Bell
- Bridgeman Foods (287): Chili's Grill & Bar/Chili's Too, Wendy's
- United States Beef Corp. (277): Arby's
- WilcoHess (274): Arby's, Dunkin' Donuts, Godfather's Pizza, Subway, Wendy's
- Mason Harrison Ratliff Enterprises (268): Sonic Drive-In
- Richard Lawlor (265): Dunkin' Donuts
- JIB Management (258): Blimpie, Denny's, Jack in the Box
- Hess Corp. (257): Burger King, Godfather's Pizza, Quiznos
- K-Mac Enterprises (253): KFC, Long John Silver's, Taco Bell
- Love's Travel Stops & Country Stores (245): Arby's, Chester's, Godfather's Pizza, Subway
- Fugate Enterprises (242): Pizza Hut, Taco Bell
- Southern California Pizza (223): Pizza Hut
- MUY Brands (219): KFC, Long John Silver's, Pizza Hut, Taco Bell
- D L Rogers Corp. (212): Sonic Drive-In
- The Covelli Family Limited Partnership (209): Panera Bread
- MHR Sonic of Phoenix (205): Sonic Drive-In

- Quality Dining (179): Burger King, Chili's Grill & Bar/Chili's Too
- Kmart Corp. (177): Little Caesars Pizza
- Border Foods (175): Church's Chicken, KFC, Taco Bell
- The Pantry (173): Chester's, Church's Chicken, Dairy Queen/DQ, Hot Stuff Foods, Noble Roman's Pizza, Quiznos, Subway
- Sizzling Platter (170): Little Caesars Pizza, Sizzler
- TA Operating (166): Burger King, Pizza Hut, Popeyes Louisiana Kitchen, Subway, Taco Bell, Tim Hortons
- Compass Group USA (160): Au Bon Pain, Blimpie, Bojangles', Burger King, Denny's, Häagen-Dazs, Jamba Juice, Moe's Southwest Grill, Nathan's Famous, Panda Express, Papa John's Pizza, Pizza Hut, Quiznos, Sbarro, Subway, Tim Hortons, Uno, Wendy's
- BR Associates/Sidal (158): Denny's, Long John Silver's, Wendy's
- JRN (157): KFC, Pizza Hut
- B & B Consultants (154): Sonic Drive-In
- Davco Restaurants (153): Wendy's
- James Gressett (152): Pizza Hut
- Cedar Enterprises (150): Burger King, Wendy's
- Interfoods of America (147): Burger King, Popeyes Louisiana Kitchen
- Restaurant Management Company of Wichita (144): Long John Silver's, Pizza Hut
- Charter Foods (140): A&W, Long John Silver's, Pizza Hut, Taco Bell
- Palo Alto (137): KFC, Pizza Hut, Taco Bell
- Celebration Restaurant Group/CFL Pizza/Bravo Foods (135): Pizza Hut, Taco Bell
- RPM Pizza (135): Domino's Pizza
- Carlisle Corp. (133): Wendy's
- PJ United (133): Papa John's Pizza
- Falcon Holdings (132): Church's Chicken
- Fourteen Foods (131): Dairy Queen/DQ
- Valenti Management (129): Chili's Grill & Bar/Chili's Too, Wendy's
- America's Pizza Co (128): Pizza Hut

- Tri Star Energy (127): Pacific Pride Services
- Jerry Miller (126): Pizza Hut
- KBP Foods (124): KFC, Taco Bell
- Gary Jarrard (122): Sonic Drive-In
- Rage (121): Pizza Hut
- Wisconsin Hospitality Group (121): Applebee's, Pizza Hut
- Apex Restaurant Management (120): KFC, Long John Silver's, Taco Bell
- Apple Gold (119): Applebee's
- JEM Restaurant Group (119): Pizza Hut, Taco Bell
- Briad Restaurant Group (115): T.G.I. Friday's, Wendy's
- Neighborhood Restaurant Partners (115): Applebee's
- The Scrivanos Group (115): Baskin-Robbins, Dunkin' Donuts
- Summit Restaurant Group (114): Pizza Hut
- Western Reserve Restaurant Management (112): Wendy's
- V & J Holding Companies (111): Auntie Anne's, Burger King, Pizza Hut, The Coffee Beanery
- Mark Cafua (110): Baskin-Robbins, Dunkin' Donuts
- Hess Mart (107): Blimpie
- Luihn Food Systems (106): A&W, KFC, Long John Silver's, Pizza Hut, Taco Bell
- Pepper Dining (105): Chili's Grill & Bar/Chili's Too
- 85 Daland Corp. (103): Pizza Hut
- Northeast Foods (101): Burger King
- Brij Agrawal (100): Subway
- Marchelle Stewart (99): KFC
- BurgerBusters (98): Pizza Hut, Taco Bell
- Bajco (96): Papa John's Pizza
- Magic Burgers (96): Burger King
- Goldco (95): Burger King

- Paradigm Investment Group (94): Hardee's
- William B Graves (94): Domino's Pizza
- The Jan Companies (94): Burger King

46.2 Market Resources

Franchise Update Media Group, P.O. Box 20547, San Jose, CA 95160.
(408) 402-5681. (www.franchising.com)

TOP GROWTH CHAINS

47.1 Systemwide Sales Growth

According to Nation's Restaurant News (www.nrn.com), the following chains reported the highest systemwide sales growth at the end of their most recent fiscal year (FY2012/FY2013):

• Dickey's Barbecue Pit:	56.9%
• Smashburger:	40.0%
• Firehouse Subs:	33.6%
• Marco's Pizza:	32.5%
• Chuy's:	32.2%
• Raising Cane's Chicken Fingers:	30.5%
• Seasons 52:	29.9%
• Jersey Mike's Subs:	25.3%
• Jimmy John's Gourmet Subs:	24.7%
• Cheddar's:	24.5%
• Yard House:	23.5%
• Buffalo Wild Wings Grill & Bar:	20.8%
• Wingstop:	20.5%
• Chipotle Mexican Grill:	20.0%
• Noodles & Company:	19.7%
• Brio Tuscan Grille:	18.8%
• Little Caesars Pizza:	18.4%
• Zaxby's:	16.6%
• Panda Express:	16.2%
• Joe's Crab Shack:	15.3%
• Bar Louie:	14.4%
• Sarku Japan/Sushi Bar/Teriyaki & Sushi Express:	14.2%
• Chick-fil-A:	14.2%
• BJ's Restaurant & Brewery/Brewhouse/Pizza & Grill:	14.1%
• Five Guys Burgers and Fries:	13.9%
• Tropical Smoothie Café:	13.8%
• Corner Bakery Cafe:	13.6%
• Potbelly Sandwich Works/Shop:	13.3%
• Popeyes Louisiana Kitchen:	13.3%
• Wawa:	12.9%
• Panera Bread:	12.8%

• Casey's General Store:	12.8%
• Smoothie King:	12.6%
• Bojangles' Famous Chicken 'n Biscuits:	12.6%
• Whataburger:	12.6%
• Bahama Breeze:	12.6%
• Tim Hortons:	12.5%
• Texas Roadhouse:	12.5%
• Quaker State & Lube:	12.2%
• Culver's:	12.2%
• Bubba Gump Shrimp Co.:	12.0%
• Bonefish Grill:	11.6%
• Schlotzsky's Deli:	10.8%
• Stripes:	10.8%
• Qdoba Mexican Grill:	10.3%
• Dave & Buster's:	9.7%
• Pollo Tropical Chicken on the Grill:	9.3%
• Starbucks:	9.3%
• In-N-Out Burger:	9.2%
• Costco:	9.1%
• McAllister's Deli:	9.1%

47.2 Market Resources

Nation's Restaurant News, 1166 Avenue of the Americas, 10th Floor, New York, NY 10036. (212) 204-4200. (www.nrn.com)

TOP INDEPENDENT RESTAURANTS

48.1 Rank By Annual Gross Revenue

According to *Forbes*, the following independent restaurants have the highest annual gross revenue:

- | | |
|---|----------------|
| • Bob Chinn's Crab House (Wheeling, IL): | \$24.0 million |
| • The Grill On Main (Edgartown, MA): | \$23.5 million |
| • Sparks Steak House (New York, NY): | \$23.0 million |
| • Tony's Restaurant & Catering (Houston, TX): | \$20.0 million |
| • Athenian Inn (Seattle, WA): | \$19.2 million |
| • Joe's Stone Crab (Miami Beach, FL): | \$19.0 million |
| • Rickey's Restaurant (Novato, CA): | \$18.7 million |
| • Bridgewater Grill (Golden, CO): | \$18.4 million |
| • Elizabeth on 37 th (Savannah, GA): | \$17.4 million |
| • Jeeves & Co. (Scottsburg, IN): | \$15.9 million |

“The highest grossing restaurant in the U.S. is not in some swank corner of Manhattan or on a glittery Los Angeles boulevard, but in the unassuming Chicago suburb of Wheeling.”

Forbes

48.2 Market Resources

Forbes, 60 5th Avenue, New York, NY 10011. (212) 366-8900. (www.forbes.com)

TOP MULTI-CHAIN OPERATORS

49.1 Largest Multi-Brand Restaurant Companies

Ranked by annual U.S. systemwide sales, the following are the largest restaurant companies operating multiple chain brands:

- Yum! Brands Inc. (www.yum.com): \$17.70 billion
Brands: KFC, Pizza Hut, Taco Bell
- Darden Restaurants Inc. (www.darden.com): \$ 8.46 billion
Brands: Bahama Breeze, Eddie V's, LongHorn Steakhouse, Olive Garden, Red Lobster, Seasons 52, The Capital Grille, Yard House
- DineEquity (www.dineequity.com): \$ 7.15 billion
Brands: Applebee's Neighborhood Grill & Bar, IHOP
- Roark Capital Group (www.roarkcapital.com): \$ 5.30 billion
Brands: Arby's, Auntie Annie's, Carvel Ice Cream, Cinnabon, Corner Bakery Cafe, Il Fornaio, McAlister's Deli, Miller's Alehouse, Moe's Southwest Grill, Schlotzsky's Deli, Seattle's Best Coffee, Wingstop
- Bloomin' Brands (www.bloominbrands.com): \$ 3.85 billion
Brands: Bonefish Grill, Carrabba's Italian Grill, Fleming's Prime Steakhouse, Outback Steakhouse, Roy's
- Brinker International Inc. (www.brinker.com): \$ 3.95 billion
Brands: Chili's Grill & Bar, Maggiano's Little Italy
- Sun Capital Partners Inc. (www.suncappart.com): \$ 2.23 billion
Brands: Bar Louie, Boston Market, Fazoli's, Friendly's, Garden Fresh, Johnny Rockets, LaPlace, Restaurants Unlimited, Smokey Bones

- Landry's Inc. (www.landrysinc.com): \$ 1.24 billion
Brands: Bubba Gump Shrimp Co., Charley's Crab, Chart House,
Claim Jumper, Landry's Seafood, Morton's, Rainforest Café,
Saltgrass Steak House, The Crab House,
The Oceanaire Seafood Room

TOP MULTI-CONCEPT OPERATORS

50.1 Largest Companies

Fine- and casual-dining restaurants are primarily operated by independents and chains, yet an increasing number are being operated by multi-concept operators. This chapter assesses the largest of these groups.

Restaurants operated by hotel chains are not classified as multi-concept restaurants. Quickservice and fast-casual concepts are also not included in the assessment of multi-concept restaurant operations.

50.2 Largest Multi-Concept Operators

Ranked by annual sales, the following are the largest multi-concept operators (source: *2013 Directory of Chain Restaurant Operators*, published by Chain Store Guide [www.chainstoreguide.com]):

• Landry's Restaurants Inc.:	\$1.42 billion
• Pappas Restaurants:	\$ 525 million
• Lettuce Entertain You Enterprises:	\$ 400 million
• Hillstone Restaurant Group Inc.:	\$ 369 million
• Kimpton Hotel & Restaurant Group:	\$ 353 million
• Consolidated Restaurant Operations Inc.:	\$ 188 million
• Wolfgang Puck Fine Dining Group:	\$ 168 million
• Starr Restaurant Organization:	\$ 167 million
• Ark Restaurant Corporation:	\$ 139 million
• Restaurants Unlimited:	\$ 135 million
• Tavistock Restaurants:	\$ 133 million
• Patina Restaurant Group:	\$ 126 million
• Clyde's Restaurant Group:	\$ 110 million
• Specialty Restaurant Corporation:	\$ 108 million
• McMenamins Pubs & Breweries:	\$ 107 million
• The Olive Group:	\$ 100 million

50.3 Profiles

The following are profiles of multi-concept operators with annual revenue of \$35 million or more:

Ala Carte Entertainment (Schaumburg, IL; www.aceplaces.com)

- Area of operation: IL
- Annual sales: \$48.0 million
- Brands: Ace Catering, Cadillac Ranch, Chandler's Chophouse, Club 220 North, Dick's River Road House, Drink, Excalibur, Famous Freddie's Roadhouse, Fin McCools, Metro Deli, Moretti's, One Last Fling Chicago, Rocking The Chain, Snuggery, The Apartment, The Leg Room, The Lion Head Pub, Vision

Ark Restaurant Corporation (New York, NY; www.arkrestaurants.com)

- Areas of operation: CT, DC, FL, MA, NJ, NV, NY
- Annual sales: \$138.9 million
- Brands: America, Broadway Burger Bar & Grill, Bryant Park Grille, Canyon Road, Center Cafe, Clyde Frazier's Wine and Dine, Durgin Park Restaurant, El Rio Grande, Gallagher's Burger Bar, Gallagher's Steakhouse, Gonzalez y Gonzalez, Hard Rock Hotel & Casino Hollywood Food Court, Hard Rock Hotel & Casino Tampa Food Court, Lucky Seven, MGM Grand Food Court, Robert, Sequoia, The Grill At Two Trees, The Sporting House, Thunder Grill, Venetian Casino Resort Food Court, Village Streets, Yolos Mexican Grill

B.R. Guest Inc. (New York, NY; www.brguestrestaurants.com)

- Areas of operation: IL, NV, NY
- Annual sales: \$ 56.0 million
- Brands: 675 Bar, Atlantic Grill, Bill's Bar and Burger, Blue Fin, Blue Water Grill New York, Dos Caminos, Fiamma, Isabella's, Ocean Grill, Ruby Foo's Time Square, Sammy D's, Strip House, Wildwood Barbeque

Buckhead Life Restaurant Group (Atlanta, GA; www.buckheadrestaurants.com)

- Areas of operation: FL, GA
- Annual sales: \$73.0 million
- Brands: 103 West, Atlanta Fish Market, Bistro Niko, Buckhead Diner, Chops Lobster Bar, Corner Cafe/Buckhead Bread, Kyma, Nava, Pricci, Veni Vidi Vici

Cameron Mitchell Restaurants (Columbus, OH; www.cameronmitchell.com)

- Areas of operation: FL, KY, OH, MI
- Annual sales: \$86.0 million
- Brands: Cameron's American Bistro, Cap City Fine Diner, M, Marcella's Ristorante, Pizzeria and Wine Bar, Martini Modern Italian, Miranova Cafe, Mitchell's Ocean Club, Molly Woo's, Ocean Prime

Centra Archy Restaurant Management Co. (Charleston, SC; www.centraarchy.com)

- Areas of operation: FL, GA, LA, NC, SC
- Annual sales: \$65.0 million
- Brands: California Dreaming, Carolina Roadhouse, Chophouse 47, Chophouse New

Orleans, Fiesta Del Burro Loco, Gulfstream Cafe, Joey D's Oak Room, Lenox Square Grill, New York Prime, The Tavern at Phipps

Charlie Palmer Group (New York, NY; www.charliepalmer.com)

- Areas of operation: CA, DC, NV, NY, TX
- Annual sales: \$55.0 million
- Brands: Astra, Aureole, Briscola, Burritt Room + Tavern, Charlie Palmer @ Bloomingdales, Charlie Palmer On The Joule, Charlie Palmer Steak, District Meats, Dry Creek Kitchen

Clyde's Restaurant Group (Washington, DC; www.clydes.com)

- Areas of operation: DC, MD, VA
- Annual sales: \$110.0 million
- Brands: 1789 Restaurant, Clyde's, Clyde's Willow Creek Farm, F. Scott's, Old Ebbitt Grill, The Hamilton, The Tomato Palace, The Tombs, Tower Oaks Lodge

Concentrics Restaurants (Atlanta, GA; www.concentricshospitality.com)

- Areas of operation: FL, GA
- Annual sales: \$70.0 million
- Brands: Flip, HD1, Lobby at Twelve, LPC, Luma on Park, Murphy's, ONE Midtown Kitchen, Parish, Prato, Room at Twelve, Tap, The Spence, Three Sixty, Two Urban Licks

Consolidated Restaurant Operations Inc. (Dallas, TX; www.croinc.com)

- Areas of operation: AL, AR, CO, FL, KY, LA, MO, OK, SC, TN, TX
- Annual sales: \$188.0 million
- Brands: Cantina Laredo, Cool River Cafe Steakhouse & Southwestern Grill, Double D Ranch, El Chico Cafe, Good Eats Grill, Ill Forks, Lucky's Cafe, Silver Fox Steakhouse

Copper Cellar Corporation (Knoxville, TN; www.coppercellar.com)

- Area of operation: TN
- Annual sales: \$50.0 million
- Brands: Calhoun's, Cappuccino's, Cherokee Grill, Chesapeake's, Copper Cellar, Cumberland Grill, Smoky Mountain Brewery

Divine Dining Group (Myrtle Beach, SC; www.divinedininggroup.com)

- Area of operation: SC
- Annual sales: \$40.0 million
- Brands: Blue Crab, Bovine's Wood Fired Specialities, Bubba's Fish Shack, Divine Fish House, Divine Prime Restaurant, River City Cafe, Ultimate California Pizza, Wahoo's Raw Bar & Marina

Fireman Hospitality Group (New York, NY; www.thefiremangroup.com)

- Area of operation: NY
- Annual sales: \$51.0 million
- Brands: Bond 45, Brooklyn Diner Times Square, Brooklyn Diner USA, Cafe Fiorello's, Fiorella Pizzeria E Caffè, Redeye Grill, Trattoria dell'Arte

Gibson Restaurant Group (Chicago, IL; www.gibsonssteakhouse.com)

- Area of operation: IL
- Annual sales: \$51.0 million
- Brands: Gibsons Bar & Steakhouse, Hugo's Frog Bar & Fish House, Luxbar, Quartino Ristorante, Pizzeria Wine Bar

Great American Restaurants (Falls Church, VA; www.greatamericanrestaurants.com)

- Area of operation: VA
- Annual sales: \$56.5 million
- Brands: Artie's, Best Buns Bread, Carlyle, Coastal Flats, Jackson's, Mike's American Grill, Ozzie, Silverado, Sweetwater Tavern

Hal Smith Restaurant Group (Norman, OK; www.eshrhg.com)

- Areas of operation: AR, AZ, FL, IN, KS, MD, NE, OK, TX, VA
- Annual sales: \$96.0 million
- Brands: Big Tuna, Charleston's Restaurant, Hefner Grill, Krispy Kreme Doughnuts, Louie's Grill and Bar, Mahogany Prime Steak House, Mama Roy, Red Rock Canyon Grille, Sauce, Ted's Café Escondido, The Garage, Toby Keith's I Love This Bar & Grill, Upper Crust Wood Fired Pizza

Hillstone Restaurant Group Inc. (Beverly Hills, CA; www.hillstone.com)

- Areas of operation: AZ, CA, CO, FL, GA, IL, LA, MA, MD, MO, NJ, NY, TN, TX
- Annual sales: \$369.0 million
- Brands: Bandera, Cherry Creek Grill, East Hampton Grill, Gulfstream, Hillstone, Houston's, Los Altos Grill, Palm Beach Grill, R + D Kitchen, Rutherford Grill, South Beverly Grill, Woodmont Grill

Kimpton Hotel & Restaurant Group (San Francisco, CA; www.kimptonhotels.com)

- Areas of operation: AZ, CA, CO, DC, FL, IL, MA, NY, OR, TX, UT, WA
- Annual sales: \$353.0 million
- Brands: 312 Chicago, 39 Degrees, Alto Rex, Area 31, Atwood Café, B&O Brasserie, Bambara Cambridge, Bambara Salt Lake City, Bar Rouge, Blue Mermaid Café, BLVD 16, Bookstore Bar & Café, BRABO, Café Pescatore, Central 214, Cobalt, Domaso Trattoria Moderna, Encore, Fifth Floor, Firefly, Grand Café, Harry Denton's Starlight Room, Heaton's Reef Bar & Grill, Helix Lounge, Jackson 20, KO Prime, Library Bistro, NIOS, Pacci Ristorante, Panzano, Park Place, Pazzo Bakery & Café, Pazzo Ristorante, Ponzu, Poste Brasserie, Postrio, Puccini & Pinetti, Red Star Tavern & Roast House, Ruby Room, Sable Kitchen & Bar, Sazerac, Scala's Bistro,

Silverleaf Tavern, Six and Lounge Six, Social, South Water Kitchen, Square 1682, Taggia, The Grille, Tulio, Urbana

King's Seafood Co. (Costa Mesa, CA; www.kingsseafood.com)

- Areas of operation: AZ, CA, NV
- Annual sales: \$50.5 million
- Brands: 555 East Prime, Fish Camp, King's Fish House and King Crab Lounge, Lou & Miceys, Ocean Avenue Seafood, Pier Burger, Water Grill

Landry's Restaurants Inc. (Houston, TX; www.landryseafood.com)

- Areas of operation: AL, AZ, CA, CO, CT, FL, GA, IL, KS, KY, LA, MA, MD, MI, MN, MO, NJ, NM, NY, OK, OR, PA, SC, TN, TX, VA, WA
- Annual sales: \$1.42 billion
- Brands: Aquarium, Babin's Seafood House, Beso Steakhouse, Big Fish Seafood Bistro, Brenner's Steakhouse, Bubba Gump Shrimp Co., Cadillac Bar Restaurant, Charley's Crab, Chart House, Claim Jumper, Fish Tales, Fisherman's Wharf, Gandy Dancer, Grand Concourse, Grotto, Harlow's, Jake's Famous Crawfish, Jake's Grill, La Griglia, Landry's Seafood House, M & S Grill, Mai Tai Bar, McCormick & Schmick's Grille, McCormick's Fish House & Bar, Meriwether's, Peohe's, Rainforest Café, Red Sushi, River Crab, Rusty Pelican, Saltgrass Steak House, Simms Steakhouse, Spenger's Fresh Fish Grotto, T-Rex Café, The Boathouse, The Crab House, The Flying Dutchman, The Heathman Restaurant & Bar, The Oceanaire Seafood Room, Tower of the Americas, Vic & Anthony's Steakhouse, William Douglas Steakhouse, Willie G's Seafood & Steak House, Yak & Yeti

Lettuce Entertain You Enterprises (Chicago, IL; www.leye.com)

- Areas of operation: AZ, CA, IL, MN, NV, VA
- Annual sales: \$400.0 million
- Brands: Antico Posto, Big Bowl Fresh Chinese and Thai, Bub City, Cafe Ba-Ba-Reeba!, Community Canteen, Di Pescara, Don & Charlie's, Eiffel Tower Restaurant, El Segundo Sol Taqueria & Margarita Bar, Everest, foodlife, Frankie's Scaloppine & Fifth Floor Pizzeria, Hub 51, Joe's Seafood, Prime Steak, and Stone Crab, L. Woods Tap & Pine Lodge, L20, M Burger, M Street Kitchen, Maggiano's Little Italy, Mity Nice Grill, Mon Ami Gabi, Nacional 27, Osteria via Stato, Paris Club, Petterino's, Pizzeria via Stato, R.J. Grunts, Reel Club, RPM Pizza, Saranello's, Scooz!, Shaw's Crab House, Stella Rossa Pizza Bar, Stripburger, The Magic Pan Crepe Stand, Tokio Pub, Tru, Tucci Benucch, Twin City Grill, Wildfire, Wow Bao

M Crowd Restaurant Group (Irving, TX; www.mcrowd.com)

- Areas of operation: GA, MO, TX
- Annual sales: \$50.0 million
- Brands: Mi Cocina, Taco Diner, The Mercury Grill

Mad Anthony's Inc (Kirkland, WA; www.anthonys.com)

- Areas of operation: OR, WA
- Annual sales: \$51.0 million
- Brands: Anthony's at Cap Sante Boat Haven, Anthony's at Columbia Point, Anthony's at Gig Harbor, Anthony's at Point Defiance, Anthony's at Sinclair Inlet, Anthony's at Spokane Falls, Anthony's at Squalicum Harbor, Anthony's at The Old Mill District, Anthony's Beach Café, Anthony's Bell Street Diner, Anthony's Fish Bar, Anthony's Hearthfire Grill, Anthony's HomePort, Anthony's Pier 66, Anthony's Seafood Grill, Anthony's Woodfire Grill, Chinook's at Salmon Bay, Des Moines Oyster Bar & Grill, Harbor Lights, Little Chinook's

McMenamins Pubs & Breweries (Portland, OR; www.mcmenamins.com)

- Areas of operation: OR, WA
- Annual sales: \$106.7 million
- Brands: Back Stage Bar, Bagdad Café and Theater, Barley Mill Pub, Black Rabbit Restaurant, Blue Moon Tavern and Grill, Cornelius Pass Road House and Brewery, Dad Watsons Restaurant and Brewery, East 19th Street Café, Edgefield Manor, Fulton Pub and Brewery, Grand Lodge, Greater Trumps, Greenway Pub, High Street Brewery & Pub, Highland Pub and Brewery, Hillsdale Brewery and Public House, Hotel Oregon, Hotel Oregon Pub, John Barleycorn's Restaurant and Brewery, Kennedy School, Lighthouse Brewpub, Market Street Pub, McMenamins, Mission Theater and Pub, North Bank, Oak Hills Brewpub, Olympic Club, Raleigh Hills Pub, Ringler's Annex, Ringlers, Riverwood Pub, Rock Creek Tavern, Six Arms Brewpub, The Crystal Ballroom, The Ram's Head, The White Eagle, Thompson Brewery and Public House

Pappas Restaurants (Houston, TX; www.pappadeaux.com)

- Areas of operation: AZ, CO, GA, IL, NM, OH, TX
- Annual sales: \$525.0 million
- Brands: Dot Coffee Shop, Pappadeaux Seafood Kitchen, Pappas B-B-Q, Pappas Bros. Steakhouse, Pappas Burger, Pappas Seafood House, Pappasito's Cantina, Ruby's Diner, Yia Yia Marys Pappas Greek Kitchen

Patina Restaurant Group (New York, NY; www.patinagroup.com)

- Areas of operation: CA, FL, NV, NY
- Annual sales: \$126.0 million
- Brands: Brasserie, Brasserie 8 ½, C+M at LACA, Café at the Opera, Café Centro, Café Descanso at Descanso Gardens, Café Pinot, Catal Restaurant & UVA Bar, Concert Hall Café, Cucina & CO, Kendell's Brasserie, LACMA Café, La Fonda Del Sol, Leatherby's Café Rouge, Lincoln Ristorante, Macy's Cellar Bar & Grill, Market Café, Naples 45, Naples Ristorante & Pizzeria, Nick & Stef's Steakhouse, Norton Simone Café at Norton Simon Museum, Panevino Ristorante, Patina, Pinot Brasserie at the Venetian, Pinot Grill, Pinot Provence, Ray's and Stark Bar at LACMA, Rock Center Café, Rooftop Grill at Hollywood Bowl, Spotlight Café,

Tangata, Taqueria, The Beer Bar, The Grand Tier Restaurant, The Rink, The Sea Grill, Tortilla Jo's, Tutto Italia, Via Napoli

Restaurants Unlimited (Seattle, WA; www.r-u-i.com)

- Areas of operation: AK, AZ, CA, HI, IN, MN, OH, OR, TX, VA, WA
- Annual sales: \$135.0 million
- Brands: Billy Heartbeats, Clinkerdagger, Cutters Crabhouse, Henry's Tavern, Horatio's, Kincaid's, Maggie Bluff's, Manzana, Newport Bay, Palisade, Palomino Restaurant & Bar, Pizzeria Fondi, Portland City Grill, Portland Seafood Co., Ryan's Grill, Scott's Bar & Grill, Simon & Seafort's Saloon & Grill, Skates on the Bay, Stanford's, Stanley & Seafort's Steak, Chop & Fish House

Restaurants-America (Glenview, IL; www.restaurants-america.com)

- Areas of operation: FL, IL, MD, MN, TX, VA
- Annual sales: \$40.0 million
- Brands: Bluepointe Oyster Bar, Boca Chica Tapas & Tequila, Central Standard, Midtown Kitchen & Bar, Mockingbird Taproom, One North, Park Tavern, Primebar, Red Star Tavern, The Grillroom, Townhouse Restaurant & Wine Bar

Schwartz Brothers Restaurants (Bellevue, WA; www.schwartzbros.com)

- Area of operation: WA
- Annual sales: \$53.0 million
- Brands: Chandler's Crabhouse, Daniel's Broiler, Spazzo Italian Grill

Select Restaurants (Cleveland, OH; www.selectrestaurants.com)

- Areas of operation: CA, IL, MA, MD, OH, PA
- Annual sales: \$50.0 million
- Brands: Parker's Blue Ash Tavern, Parker's Lighthouse, Parker's Restaurant & Bar, Pier W, Rusty Scupper, Top of the Hub, Winberie's Restaurant & Bar

Specialty Restaurants Corporation (Anaheim, CA; www.specialtyrestaurants.com)

- Areas of operation: CA, CO, FL, NY, OH, TX
- Annual sales: \$107.5 million
- Brands: 100th Bomb Group, 56th Fighter Group, 94th Aero Squadron, Brady's Landing, Castaway, Guaymas, HS Lordships, Luminarias, Monterey Hill Steak & Seafood Restaurant, Orange Hill, Rusty Pelican, Shanghai Reds, Sunbird, The Odyssey, The Proud Bird, The Reef, The River Club Restaurant, Whiskey Joe's

Starr Restaurant Organization (Philadelphia, PA; www.starr-organization.com)

- Areas of operation: FL, NJ, NY, PA
- Annual sales: \$166.6 million
- Brands: Alma de Cuba, Barclay Prime, Buddakan, Butcher and Singer, Caffe Storico, Continental Midtown, El Rey, El Vez, Fette Sau, Frankford Hall, Granite Hill at Philadelphia Museum of Art, Il Pittore, Jones, Le Diplomate, Makoto, Morimoto,

Parc, Pizzeria Stella, Pod, Rat's Restaurant, Route 6, Square Burger, Steak 954, Talula's Garden, The Continental, The Dandelion Pub

Tavistock Restaurants (Emeryville, CA; www.tavistock.com)

- Areas of operation: AR, AZ, CA, CT, FL, IN, KS, MA, MD, MN, MO, NH, NJ, OK, PA, RI, TX
- Annual sales: \$132.6 million
- Brands: Abe & Louie's, Alcatraz Brewing Co., Atlantic Fish, Blackhawk Grille, Cafe Del Rey, California Cafe Bar & Grill, Charley's, Coach Grill, FREEBIRDS World Burrito, Joe's American Bar & Grill, Napa Valley Grille, Sapporo, Zed 451

The Glazier Group (www.theglaziergroup.com)

- Areas of operation: FL, NJ, NY
- Annual sales: \$42.8 million
- Brands: Bridgewaters, Michael Jordan's The Steak House, Strip House

The Olive Group (Charlestown, MA; www.toddenglish.com)

- Areas of operation: CT, FL, MA, NV, NY
- Annual sales: \$100.0 million
- Brands: BlueZoo, BonFire, Ca Va Brasserie, English Tap and Beer Gardens, Figs, Isabell's CurlyCakes, Kingfish Hall, Olives, Plaza Food Hall, Todd English P.U.B., Todd English Restaurant, Todd English Tuscany

Tour de France (New York; New York; www.tourdefrancencyc.com)

- Area of operation: NY
- Annual sales: \$48.0 million
- Brands: Café D'Alsace, French Roast, L'Express, Le Monde, Maison, Marseille, Nice Matin, Pigalle

Trowbridge Restaurant Group (Bingham Farms, MI; www.mattpreincerg.com)

Area of operation: MI

- Annual sales: \$41.6 million
- Brands: Coach Insignia, Deli Unique, Gastronomy, No. VI Chophouse & Lobster Bar, Northern Lakes Seafood Co., Plaza Deli

TS Restaurants (Lahaina, HI; www.tsrestaurants.com)

- Areas of operation: CA, HI
- Annual sales: \$96.0 million
- Brands: Duke's, Hula Grill, Jake's Del Mar, Keoki's Paradise, Kimo's, Leilani's on the Beach, Sandys Beach Grill, Sunnyside Restaurant & Lodge

Wolfgang Puck Fine Dining Group (Beverly Hills, CA; www.wolfgangpuck.com)

- Areas of operation: AZ, CA, CO, DC, FL, GA, HI, IL, IN, KY, MA, MI, NC, NV, NJ, NY, OH, OK, RI, TX, UT, WA
- Annual sales: \$167.7 million
- Brands: Chinois, CUT, Five Sixty by Wolfgang Puck, Gelson's Grab and Go, Jai by Wolfgang Puck, Measure, Postrio Bar & Grill, Puck's at the MCA, Red/Seven, Spago, Spectra by Wolfgang Puck, Trattoria del Lupo, The Source, Wolfgang Puck American Grille, Wolfgang Puck Bar & Grill, Wolfgang Puck Bistro, Wolfgang Puck Bistro, Wolfgang Puck Express, Wolfgang Puck Grand Café, Wolfgang Puck Grille, Wolfgang Puck Kiosk, Wolfgang Puck Pizza / Bar, Wolfgang Puck Pizzeria & Cucina, Wolfgang Puck Steak, WP24 by Wolfgang Puck

50.4 Market Resources

Chain Store Guide, 10117 Princess Palm Avenue, Suite 375, Tampa, FL 33610.
(800) 927-9292. (www.chainstoreguide.com)

TOP NIGHTCLUBS & BARS

51.1 Top Clubs

Nightclub and Bar Magazine annually ranks the top clubs in the United States by estimated revenue. The 2014 list is as follows (based on 2013 revenue):

- XS Nightclub (Las Vegas, NV; www.xslasvegas.com): \$90-\$95 million
- Marquee Nightclub & Dayclub (Las Vegas, NV; www.marqueelasvegas.com): \$85-\$90 million
- TAO LV (Las Vegas, NV; www.taolasvegas.com): \$50-\$55 million
- Surrender Nightclub (Las Vegas, NV; www.surrendernightclub.com): \$45-\$50 million
- LIV (Miami Beach, FL; www.livnightclub.com): \$40-\$45 million
- Pure Nightclub (Las Vegas, NV; www.purethenightclub.com): \$30-\$35 million
- LAVO NY (New York, NY; www.lavony.com): \$30-\$35 million
- Story (Miami, FL; www.story.wantickets.com): \$25-\$30 million
- LAVO LV (Las Vegas, NV; www.lavolv.com): \$25-\$30 million
- Hyde Bellagio (Las Vegas, NV; www.hydebellagio.com): \$25-\$30 million
- HAZE (Las Vegas, NV; www.lightgroup.com): \$25-\$30 million
- Mango's Tropical Cafe (Miami Beach, FL; www.mangostropicalcafe.com): \$20-\$25 million
- Tryst Nightclub Las Vegas, NV; www.trystlasvegas.com): \$20-\$25 million
- 1 Oak Las Vegas (Las Vegas, NV; www.1oaklasvegas.com): \$20-\$25 million
- echostage (Washington, DC; www.echostage.com): \$20-\$25 million
- The Pool After Dark (Atlantic City, NJ; www.caesars.com/poolafterdark): \$20-\$25 million
- Seacrets (Ocean City, MD; www.seacrets.com): \$20-\$25 million
- Greystone Manor (West Hollywood, CA; www.greystonemanra.com): \$15-\$20 million
- Emerson Theatre (Los Angeles, CA; www.emersontheatre.com): \$15-\$20 million
- Marquee NY (New York, NY; www.marqueeny.com): \$15-\$20 million
- Avalon Hollywood (Los Angeles, CA; www.avalonhollywood.com): \$15-\$20 million
- PHD (New York, NY; www.phdlounge.com): \$15-\$20 million
- Pacha New York (New York, NY; www.pachanyc.com): \$15-\$20 million
- The Chandelier Bar (Las Vegas, NV; www.cosmopolitanlasvegas.com): \$15-\$20 million
- The Bank Nightclub (Las Vegas, NV; www.lightgroup.com): \$15-\$20 million
- LAX Nightclub (Las Vegas, NV; www.laxthenightclub.com): \$15-\$20 million

- **Clevelander** (Miami Beach, FL; www.clevelander.com): \$15-\$20 million
- **Plush** (Dallas, TX; www.plushdallas.com): \$15-\$20 million
- **ROOF** (Chicago, IL; www.roofonthewit.com): \$10-\$15 million
- **FLUXX** (San Diego, CA; www.fluxxsd.com): \$10-\$15 million
- **Opera Nightclub** (Atlanta, GA; www.operaatlanta.com): \$10-\$15 million
- **1 Oak NYC** (New York, NY; www.1oaknyc.com): \$20-\$25 million
- **Castle Nightclub [Excalibur]** (Chicago, IL; www.castlechicago.com): \$10-\$15 million
- **The Park at Fourteenth** (Washington, DC; www.park14.com): \$10-\$15 million
- **Webster Hall** (New York, NY; www.websterhall.com): \$10-\$15 million
- **SET Nightclub** (Miami Beach, FL; www.setmiami.com): \$10-\$15 million
- **LURE** (Los Angeles, CA; www.lurehollywood.com): \$10-\$15 million
- **Altitude Sky Lounge** (San Diego, CA; www.altitudeskylounge.com): \$10-\$15 million
- **1015 Folsom** (San Francisco, CA; www.1015.com): \$10-\$15 million
- **Beta Nightclub** (Denver, CO; www.betanightclub.com): \$10-\$15 million
- **LEVU** (Dallas, TX; www.levudallas.com): \$10-\$15 million
- **Chateau Nightclub & Gardens** (Las Vegas, NV; www.chateaunights.com): \$10-\$15 million
- **Sevilla Nightclub** (Long Beach, CA; www.sevillanightclub.com): \$15-\$25 million
- **Mansion** (Miami Beach, FL; www.mansionmiami.com): \$10-\$15 million
- **Stingaree** (San Diego, CA; www.stingsandiego.com): \$10-\$15 million
- **207** (San Diego, CA; www.207sd.com): \$10-\$15 million
- **Float** (San Diego, CA; www.207sd.com): \$10-\$15 million
- **ghOstbar** (Las Vegas, NV; www.n9negroup.com): \$15-\$25 million
- **Billy Bob's Texas** (Fort Worth, TX; www.billybobstexas.com): \$10-\$15 million
- **Heat Ultra Lounge** (Anaheim, CA; www.heatultraloungeoc.com): \$10-\$15 million
- **Stone Rose** (New York, NY; www.gerberbars.com): \$10-\$15 million
- **Drai's Hollywood** (Los Angeles, CA; www.hollywood.drais.net): \$10-\$15 million
- **Thrive** (Dallas, TX; www.thrivedallas.com): \$10-\$15 million
- **Club Space** (Miami, FL; www.clubspace.com): \$10-\$15 million
- **Avenue NYC** (New York, NY; www.avenue-newyork.com): \$10-\$15 million
- **Avenu Lounge** (Dallas, TX; www.avenulounge.com): \$10-\$15 million
- **Playhouse Nightclub** (Los Angeles, CA; www.playhousenightclub.com): \$5-\$10 million
- **AJ's Club Bimini** (Destin, FL; www.ajs-destin.com): \$5-\$10 million
- **P.O.V** (Washington, DC; www.pointofviewdc.com): \$5-\$10 million
- **MOON** (Las Vegas, NV; www.n9negroup.com): \$5-\$10 million
- **Exchange LA** (Los Angeles, CA; www.exchangela.com): \$5-\$10 million
- **HQ Nightclub** (New York, NY; www.revelnightlife.com): \$5-\$10 million
- **Foundation** (Seattle, WA; www.foundation-nightclub.com): \$5-\$10 million
- **Bar Anticipation** (Lake Como, NJ; www.bar-a.com): \$5-\$10 million
- **9:30 Club** (Washington, DC; www.930.com): \$5-\$10 million
- **Sutra OC** (Costa Mesa, CA; www.sutraoc.com): \$5-\$10 million
- **Public House** (Chicago, IL; www.publichousechicago.com): \$5-\$10 million
- **Maya Day + Nightclub** (Scottsdale, AZ; www.mayaday.com): \$5-\$10 million

www.shrinemgmfoxwoods.com):	\$5-\$10 million
• Bassmnt SD (San Diego, CA; www.bassmntsd.com):	\$5-\$10 million
• Shrine Nightclub (Mashantucket, CT; www.shrinemgmfoxwoods.com):	\$5-\$10 million
• The Stage (Miami, FL; www.thestagemiami.com):	\$5-\$10 million
• Drai's Afterhours LV (Las Vegas, NV; www.draisafterhours.com):	\$5-\$10 million
• Dream Nightclub (Miami Beach, FL; www.dreammia.com):	\$5-\$10 million
• Passion Nightclub (Hollywood, FL; www.passionnightclub.com):	\$5-\$10 million
• Create Nightclub (Los Angeles, CA; www.createnightclub.com):	\$5-\$10 million
• Cielo (New York, NY; www.cieloclub.com):	\$5-\$10 million
• Fur Nightclub (Washington, DC; www.furnightclub.com):	\$5-\$10 million
• Lagasse's Stadium (Las Vegas, NV; www.palazzo.com):	\$5-\$10 million
• Body English (Las Vegas, NV; www.bodyenglish.com):	\$5-\$10 million
• U Street Music Hall (Washington, DC; www.ustreetmusichall.com):	\$5-\$10 million
• Output (Brooklyn, NY; www.output.com):	\$5-\$10 million
• Baja Sharkeez (Hermosa Beach, CA; www.sharkeez.net):	\$5-\$10 million
• Wall Lounge (Miami Beach, FL; www.wallmiami.com):	\$5-\$10 million
• Empire (Boston, MA; www.empireboston.com):	\$5-\$10 million
• Panama Joe's (Long Beach, CA; www.sharkeez.net):	\$5-\$10 million
• AV Nightclub (West Hollywood, CA; www.avnightclub.com):	\$5-\$10 million
• Gold Boutique Nightclub (Las Vegas, NV; www.lightgroup.com):	\$5-\$10 million
• The Colony (Los Angeles, CA; www.thecolonyla.com):	\$5-\$10 million
• Club 152 (Memphis, TN; www.club152memphis.com):	\$5-\$10 million
• Havana Club (Atlanta, GA; www.havanaclubatl.com):	\$5-\$10 million
• Sandbar Mexican Restaurant & Tequila Bar (Santa Barbara, CA; www.sandbarsb.com):	\$5-\$10 million
• Temple Nightclub (San Francisco, CA; www.templef.com):	\$5-\$10 million
• Lily Bar & Lounge (Las Vegas, NV; www.lightgroup.com):	\$5-\$10 million
• LOVE (Washington, DC; www.lovetheclub.com):	\$5-\$10 million
• Stoney's Rockin' Country (Las Vegas, NV; www.stoneysrockincountry.com):	\$5-\$10 million
• Lima Lounge (Washington, DC; www.limaloungedc.com):	\$5-\$10 million
• G Lounge (New York, NY; www.glounge.com):	\$5-\$10 million
• Sound Nightclub (Hollywood, CA; www.soundnightclub.com):	\$5-\$10 million
• element (New York, NY; www.elementny.com):	\$5-\$10 million

PART VII: THE CUSTOMER

CUSTOMER DEMOGRAPHICS

52.1 Overview

Who's Buying at Restaurants and Carry-outs, published by New Strategist (www.newstrategist.com), and based on data from the *Consumer Spending Survey*, by the Bureau of Labor Statistics (www.bls.gov), provides a demographic assessment of full-service and quick-service restaurant patronage across the breakfast, lunch, and dinner day-parts. Assessment is also made for dining while traveling and spending for snacks at quick-service restaurants.

Average annual household spending for the eight restaurant occasions and formats are as follows:

- Breakfast, full-service restaurants: \$ 99.99
- Breakfast, quick-service restaurants*: \$115.45
- Lunch, full-service restaurants: \$294.75
- Lunch, quick-service restaurants*: \$388.05
- Dinner, full-service restaurants: \$720.06
- Dinner, quick-service restaurants*: \$342.18
- Dining while traveling: \$237.87
- Snacks at quick-service restaurants*: \$111.01

* Quick-service restaurants in this analysis include takeout, delivery, concessions, buffets, and cafeterias other than those operated by employers and schools.

Sections 52.2 through 52.9, which follow, provide demographic assessments of these eight restaurant occasions and formats. Based on this data, assessments for spending by age, household income, household type, race/ethnicity, region, and education are presented in sections 52.10 through 52.15, respectively.

52.2 Breakfast at Full-Service Restaurants

The following is a demographic assessment of consumer spending for breakfast at full-service restaurants:

Age of Householder	Index	Marketshare	\$ Per HH
• Under age 25:	58	4%	\$ 58
• 25-to-34:	84	14%	\$ 84
• 35-to-44:	100	19%	\$ 100
• 45-to-54:	110	23%	\$ 110
• 55-to-64:	124	20%	\$ 124

• 65-to-74:	123	13%	\$ 123
• 75 and older:	70	7%	\$ 70

Household Income	Index	Marketshare	\$ per HH
• Under \$20,000:	44	9%	\$ 44
• \$20,000 to \$39,999:	69	15%	\$ 69
• \$40,000 to \$49,999:	91	8%	\$ 91
• \$50,000 to \$69,999:	114	17%	\$ 114
• \$70,000 to \$79,999:	96	6%	\$ 96
• \$80,000 to \$99,999:	132	11%	\$ 132
• \$100,000 and above:	182	33%	\$ 182

Type of Household	Index	Marketshare	\$ per HH
• Married couples, no children:	126	28%	\$ 126
• Married couples, oldest child under 6:	71	3%	\$ 71
• Married couples, oldest child 6-to-17:	110	14%	\$ 110
• Married couples, oldest child 18 or older:	168	12%	\$ 168
• Single parent with child under 18:	48	3%	\$ 47
• Single person:	74	22%	\$ 74

Race and Ethnicity	Index	Marketshare	\$ per HH
• Asian:	83	3%	\$ 83
• Black:	87	11%	\$ 87
• Hispanic:	109	13%	\$ 109
• Non-Hispanic white and other:	101	77%	\$ 101

Region	Index	Marketshare	\$ per HH
• Northeast:	100	18%	\$ 100
• Midwest:	98	22%	\$ 98
• South:	88	32%	\$ 88
• West:	121	27%	\$ 121

Education	Index	Marketshare	\$ per HH
• Less than high school graduate:	73	11%	\$ 73
• High school graduate:	98	25%	\$ 98
• Some college:	94	20%	\$ 94
• Associates degree:	116	11%	\$ 116
• Bachelors degree:	116	22%	\$ 116
• Masters, doctoral degree:	111	11%	\$ 111

Note: The index is the ratio of spending by each segment to the overall population. For example, an index of 100 indicates per household spending by a segment is equal to that of the average household. An index of 150 indicates spending by a segment is 50% higher than the average household. The marketshare is the percentage of total spending attributed by each segment.

“The biggest spenders on breakfast and brunch at full-service restaurants are older married couples leisurely enjoying a meal. Householders ages 55-to-74 spend 23% to 24% more than average on this item. Married couples without children at home (many of them empty-nesters) spend 26% more than average on breakfast and brunch at full-service restaurants. Couples with adult children at home spend 68% more than average on full-service breakfast, in part, because their households are larger.”

New Strategist

52.3 Breakfast at Quick-Service Restaurants

The following is a demographic assessment of consumer spending for breakfast at quick-service restaurants:

Age of Householder	Index	Marketshare	\$ per HH
• Under age 25:	69	5%	\$ 79
• 25-to-34:	116	20%	\$ 134
• 35-to-44:	133	25%	\$ 138
• 45-to-54:	122	26%	\$ 136
• 55-to-64:	87	14%	\$ 84
• 65-to-74:	74	8%	\$ 67
• 75 and older:	27	2%	\$ 30

Household Income	Index	Marketshare	\$ per HH
• Under \$20,000:	43	9%	\$ 50
• \$20,000 to \$39,999:	78	17%	\$ 90
• \$40,000 to \$49,999:	95	9%	\$ 109
• \$50,000 to \$69,999:	94	14%	\$ 109
• \$70,000 to \$79,999:	112	7%	\$ 129
• \$80,000 to \$99,999:	133	11%	\$ 153
• \$100,000 and above:	181	32%	\$ 209

Type of Household	Index	Marketshare	\$ per HH
• Married couples, no children:	79	18%	\$ 91
• Married couples, oldest child under 6:	164	7%	\$ 189
• Married couples, oldest child 6-to-17:	148	19%	\$ 171
• Married couples, oldest child 18 or older:	149	11%	\$ 173
• Single parent with child under 18:	66	4%	\$ 77
• Single person:	74	21%	\$ 85

Race and Ethnicity	Index	Marketshare	\$ per HH
• Asian:	82	3%	\$ 95
• Black:	84	10%	\$ 97
• Hispanic:	134	16%	\$ 155
• Non-Hispanic white and other:	97	74%	\$ 112

Region	Index	Marketshare	\$ per HH
• Northeast:	126	23%	\$ 145
• Midwest:	77	18%	\$ 88
• South:	99	36%	\$ 114
• West:	104	23%	\$ 120

Education	Index	Marketshare	\$ per HH
• Less than high school graduate:	82	12%	\$ 95
• High school graduate:	91	23%	\$ 105
• Some college:	96	21%	\$ 111
• Associates degree:	119	11%	\$ 137
• Bachelors degree:	110	20%	\$ 128
• Masters, doctoral degree:	119	12%	\$ 137

“The busiest people are the biggest spenders on breakfast at fast-food restaurants – workers and parents. Householders of prime working age, 25-to-54, spend 16% to 33% more than average on this item and account for 71% of the market. Married couples with children at home spend 51% more than average on breakfast at fast-food restaurants as they try to fit meals into their busy schedules.”

New Strategist

52.4 Lunch at Full-Service Restaurants

The following is a demographic assessment of consumer spending for lunch at full-service restaurants:

Age of Householder	Index	Marketshare	\$ per HH
• Under age 25:	60	4%	\$ 177
• 25-to-34:	104	17%	\$ 307
• 35-to-44:	109	21%	\$ 322
• 45-to-54:	110	24%	\$ 325
• 55-to-64:	101	17%	\$ 297
• 65-to-74:	97	10%	\$ 285
• 75 and older:	82	8%	\$ 241

Household Income	Index	Marketshare	\$ per HH
• Under \$20,000:	44	9%	\$ 131
• \$20,000 to \$39,999:	58	13%	\$ 172
• \$40,000 to \$49,999:	77	7%	\$ 226
• \$50,000 to \$69,999:	93	14%	\$ 275
• \$70,000 to \$79,999:	114	7%	\$ 336
• \$80,000 to \$99,999:	131	11%	\$ 385
• \$100,000 and above:	218	39%	\$ 643

Type of Household	Index	Marketshare	\$ per HH
• Married couples, no children:	123	27%	\$ 362
• Married couples, oldest child under 6:	113	5%	\$ 334
• Married couples, oldest child 6-to-17:	134	17%	\$ 395
• Married couples, oldest child 18 or older:	135	10%	\$ 396
• Single parent with child under 18:	47	3%	\$ 140
• Single person:	70	20%	\$ 206

Race and Ethnicity	Index	Marketshare	\$ per HH
• Asian:	110	4%	\$ 323
• Black:	47	6%	\$ 139
• Hispanic:	90	10%	\$ 266
• Non-Hispanic white and other:	110	84%	\$ 323

Region	Index	Marketshare	\$ per HH
• Northeast:	85	16%	\$ 251
• Midwest:	78	18%	\$ 230
• South:	119	43%	\$ 350
• West:	104	23%	\$ 308

Education	Index	Marketshare	\$ per HH
• Less than high school graduate:	61	9%	\$ 181
• High school graduate:	67	17%	\$ 197
• Some college:	93	20%	\$ 273
• Associates degree:	109	10%	\$ 320
• Bachelors degree:	143	27%	\$ 423
• Masters, doctoral degree:	166	17%	\$ 490

“The biggest spenders on lunch at full-service restaurants are the same customers who spend big on full-service dinners – middle-aged married couples leisurely enjoying a meal. Householders ages 35-to-54 spend 9% to 10% more than average on this item. Married couples without children at home (many of them empty-nesters) spend 23% more than average on lunch at full-service restaurants. Couples with school-aged or adult children at home spend 34% to 35% more, in part, because their households are larger than average.”

New Strategist

52.5 Lunch at Quick-Service Restaurants

The following is a demographic assessment of consumer spending for lunch at quick-service restaurants:

Age of Householder	Index	Marketshare	\$ per HH
• Under age 25:	94	6%	\$ 365
• 25-to-34:	122	20%	\$ 475
• 35-to-44:	127	24%	\$ 492
• 45-to-54:	111	24%	\$ 431
• 55-to-64:	94	15%	\$ 364
• 65-to-74:	61	6%	\$ 237
• 75 and older:	37	3%	\$ 143

Household Income	Index	Marketshare	\$ per HH
• Under \$20,000:	48	10%	\$ 186
• \$20,000 to \$39,999:	74	16%	\$ 286
• \$40,000 to \$49,999:	90	8%	\$ 348
• \$50,000 to \$69,999:	107	16%	\$ 417
• \$70,000 to \$79,999:	124	7%	\$ 480
• \$80,000 to \$99,999:	137	11%	\$ 530
• \$100,000 and above:	166	30%	\$ 645

Type of Household	Index	Marketshare	\$ per HH
• Married couples, no children:	91	20%	\$ 355
• Married couples, oldest child under 6:	141	6%	\$ 548
• Married couples, oldest child 6-to-17:	140	18%	\$ 543
• Married couples, oldest child 18 or older:	153	11%	\$ 593
• Single parent with child under 18:	90	5%	\$ 351
• Single person:	62	18%	\$ 240

Race and Ethnicity	Index	Marketshare	\$ per HH
• Asian:	124	5%	\$ 482
• Black:	81	10%	\$ 315
• Hispanic:	111	13%	\$ 429
• Non-Hispanic white and other:	101	77%	\$ 393

Region	Index	Marketshare	\$ per HH
• Northeast:	105	20%	\$ 409
• Midwest:	88	20%	\$ 343
• South:	101	37%	\$ 393
• West:	105	24%	\$ 409

Education	Index	Marketshare	\$ per HH
• Less than high school graduate:	79	12%	\$ 306
• High school graduate:	89	23%	\$ 345
• Some college:	99	22%	\$ 385
• Associates degree:	122	11%	\$ 473
• Bachelors degree:	111	21%	\$ 431
• Masters, doctoral degree:	120	12%	\$ 465

“Workers and parents are the best customers of fast-food lunches. Householders of prime working age, 25-to-44, spend 22% to 27% more than average on this item and account for 44% of the market. Married couples with children at home spend 44% more than average on lunches at fast-food restaurants as they try to fit meals into their busy schedules. Asians spend 24% more than average on this item.”

New Strategist

52.6 Dinner at Full-Service Restaurants

The following is a demographic assessment of consumer spending for dinner at full-service restaurants:

Age of Householder	Index	Marketshare	\$ per HH
• Under age 25:	71	5%	\$ 512
• 25-to-34:	99	17%	\$ 714
• 35-to-44:	111	21%	\$ 799
• 45-to-54:	116	25%	\$ 838
• 55-to-64:	109	18%	\$ 787
• 65-to-74:	87	9%	\$ 627
• 75 and older:	61	6%	\$ 436

Household Income	Index	Marketshare	\$ per HH
• Under \$20,000:	39	8%	\$ 278
• \$20,000 to \$39,999:	57	13%	\$ 414
• \$40,000 to \$49,999:	69	6%	\$ 496
• \$50,000 to \$69,999:	91	14%	\$ 657
• \$70,000 to \$79,999:	120	7%	\$ 862
• \$80,000 to \$99,999:	140	12%	\$1,009
• \$100,000 and above:	226	40%	\$1,627

Type of Household	Index	Marketshare	\$ per HH
• Married couples, no children:	126	28%	\$ 905
• Married couples, oldest child under 6:	104	5%	\$ 746
• Married couples, oldest child 6-to-17:	134	17%	\$ 964
• Married couples, oldest child 18 or older:	151	11%	\$1,086
• Single parent with child under 18:	54	3%	\$ 385
• Single person:	66	19%	\$ 474

Race and Ethnicity	Index	Marketshare	\$ per HH
• Asian:	141	5%	\$1,017
• Black:	52	6%	\$ 371
• Hispanic:	80	9%	\$ 574
• Non-Hispanic white and other:	111	84%	\$ 796

Region	Index	Marketshare	\$ per HH
• Northeast:	118	22%	\$ 849
• Midwest:	84	19%	\$ 605
• South:	97	35%	\$ 695
• West:	107	24%	\$ 769

Education	Index	Marketshare	\$ per HH
• Less than high school graduate:	41	6%	\$ 298
• High school graduate:	70	18%	\$ 503
• Some college:	93	20%	\$ 670
• Associates degree:	110	10%	\$ 794
• Bachelors degree:	148	28%	\$1,067
• Masters, doctoral degree:	174	18%	\$1,254

“The biggest spenders on dinners at full-service restaurants are middle-aged married couples leisurely enjoying a meal. Householders ranging in age from 35-to-64 spend 9% to 16% more than average on this item. Those with school-aged or adult children at home spend 34% to 51% more than average on this item.”

New Strategist

52.7 Dinner at Quick-Service Restaurants

The following is a demographic assessment of consumer spending for dinner at quick-service restaurants:

Age of Householder	Index	Marketshare	\$ per HH
• Under age 25:	100	7%	\$ 343
• 25-to-34:	128	21%	\$ 438
• 35-to-44:	135	26%	\$ 461
• 45-to-54:	120	25%	\$ 409
• 55-to-64:	75	12%	\$ 258
• 65-to-74:	47	5%	\$ 161
• 75 and older:	35	3%	\$ 120

Household Income	Index	Marketshare	\$ per HH
• Under \$20,000:	48	10%	\$ 166
• \$20,000 to \$39,999:	78	18%	\$ 269
• \$40,000 to \$49,999:	89	8%	\$ 304
• \$50,000 to \$69,999:	103	16%	\$ 353
• \$70,000 to \$79,999:	125	8%	\$ 429
• \$80,000 to \$99,999:	137	11%	\$ 470
• \$100,000 and above:	163	29%	\$ 557

Type of Household	Index	Marketshare	\$ per HH
• Married couples, no children:	78	17%	\$ 267
• Married couples, oldest child under 6:	145	6%	\$ 495
• Married couples, oldest child 6-to-17:	169	22%	\$ 579
• Married couples, oldest child 18 or older:	162	12%	\$ 555
• Single parent with child under 18:	93	5%	\$ 317
• Single person:	51	15%	\$ 174

Race and Ethnicity	Index	Marketshare	\$ per HH
• Asian:	107	4%	\$ 368
• Black:	106	13%	\$ 364
• Hispanic:	110	13%	\$ 378
• Non-Hispanic white and other:	98	74%	\$ 334

Region	Index	Marketshare	\$ per HH
• Northeast:	94	17%	\$ 321
• Midwest:	103	24%	\$ 352
• South:	106	38%	\$ 362
• West:	93	21%	\$ 318

Education	Index	Marketshare	\$ per HH
• Less than high school graduate:	71	10%	\$ 242
• High school graduate:	94	24%	\$ 322
• Some college:	105	23%	\$ 361
• Associates degree:	113	10%	\$ 386
• Bachelors degree:	118	22%	\$ 403
• Masters, doctoral degree:	98	10%	\$ 334

“Families with children are the biggest spenders on dinners at fast-food restaurants. House-holders ages 25-to-54 spend 20% to 35% more than average on this item and account for 72% of the market. Married couples with children at home spend 63% more than average on dinner at fast-food restaurants as they try to fit meals into their busy schedules. Asians, Blacks, and Hispanics spend between 6% and 10% more than average on fast-food dinners.”

New Strategist

52.8 Dining While Traveling

The following is a demographic assessment of consumer spending for dining (including takeout) while traveling:

Age of Householder	Index	Marketshare	\$ per HH
• Under age 25:	37	3%	\$ 88
• 25-to-34:	72	12%	\$ 171
• 35-to-44:	103	19%	\$ 243
• 45-to-54:	127	27%	\$ 302
• 55-to-64:	140	23%	\$ 332
• 65-to-74:	104	11%	\$ 248
• 75 and older:	35	5%	\$ 131

Household Income	Index	Marketshare	\$ per HH
• Under \$20,000:	27	6%	\$ 65
• \$20,000 to \$39,999:	44	10%	\$ 104
• \$40,000 to \$49,999:	63	6%	\$ 149
• \$50,000 to \$69,999:	81	12%	\$ 193
• \$70,000 to \$79,999:	106	6%	\$ 252
• \$80,000 to \$99,999:	141	12%	\$ 334
• \$100,000 and above:	269	48%	\$ 640

Type of Household	Index	Marketshare	\$ per HH
• Married couples, no children:	157	35%	\$ 372
• Married couples, oldest child under 6:	85	4%	\$ 202
• Married couples, oldest child 6-to-17:	148	19%	\$ 352
• Married couples, oldest child 18 or older:	152	11%	\$ 363
• Single parent with child under 18:	52	3%	\$ 123
• Single person:	53	15%	\$ 125

Race and Ethnicity	Index	Marketshare	\$ per HH
• Asian:	121	5%	\$ 288
• Black:	32	4%	\$ 75
• Hispanic:	62	7%	\$ 148
• Non-Hispanic white and other:	117	89%	\$ 277

Region	Index	Marketshare	\$ per HH
• Northeast:	105	20%	\$ 250
• Midwest:	94	22%	\$ 223
• South:	84	30%	\$ 199
• West:	128	29%	\$ 305

Education	Index	Marketshare	\$ per HH
• Less than high school graduate:	26	4%	\$ 61
• High school graduate:	54	14%	\$ 128
• Some college:	86	19%	\$ 204
• Associates degree:	101	9%	\$ 241
• Bachelors degree:	151	28%	\$ 360
• Masters, doctoral degree:	255	26%	\$ 607

“The biggest spenders on restaurant and carry-out meals on trips are the most avid travelers – older married couples. Householders ages 45-to-64 spend 27% to 40% more than average on this item. Married couples without children at home (most of them empty- nesters) spend 57% more than average on restaurant and carry-out meals on trips and control 35% of the market. Those with school-aged or older children at home spend 48% to 52% more. Asians, the most-affluent racial and ethnic group, spend 21% more than average on eating out while traveling. Non-Hispanic whites spent 17% more.”

New Strategist

52.9 Snacks at Quick-Service Restaurants

The following is a demographic assessment of consumer spending for snacks at quick-service restaurants:

Age of Householder	Index	Marketshare	\$ per HH
• Under age 25:	98	7%	\$ 108
• 25-to-34:	131	22%	\$ 145
• 35-to-44:	143	27%	\$ 158
• 45-to-54:	112	24%	\$ 125
• 55-to-64:	74	12%	\$ 83
• 65-to-74:	55	6%	\$ 61
• 75 and older:	23	2%	\$ 26

Household Income	Index	Marketshare	\$ per HH
• Under \$20,000:	43	9%	\$ 47
• \$20,000 to \$39,999:	68	15%	\$ 75
• \$40,000 to \$49,999:	91	8%	\$ 101
• \$50,000 to \$69,999:	101	15%	\$ 112
• \$70,000 to \$79,999:	108	7%	\$ 120
• \$80,000 to \$99,999:	154	13%	\$ 171
• \$100,000 and above:	182	33%	\$ 202

Type of Household	Index	Marketshare	\$ per HH
• Married couples, no children:	85	19%	\$ 94
• Married couples, oldest child under 6:	157	7%	\$ 175
• Married couples, oldest child 6-to-17:	182	23%	\$ 202
• Married couples, oldest child 18 or older:	148	11%	\$ 164
• Single parent with child under 18:	87	5%	\$ 96
• Single person:	59	17%	\$ 65

Race and Ethnicity	Index	Marketshare	\$ per HH
• Asian:	80	3%	\$ 89
• Black:	57	7%	\$ 63
• Hispanic:	89	10%	\$ 99
• Non-Hispanic white and other:	108	82%	\$ 120

Region	Index	Marketshare	\$ per HH
• Northeast:	108	20%	\$ 120
• Midwest:	91	21%	\$ 101
• South:	80	29%	\$ 89
• West:	135	30%	\$ 150

Education	Index	Marketshare	\$ per HH
• Less than high school graduate:	55	8%	\$ 61
• High school graduate:	83	21%	\$ 92
• Some college:	101	22%	\$ 113
• Associates degree:	116	11%	\$ 128
• Bachelors degree:	128	24%	\$ 143
• Masters, doctoral degree:	134	14%	\$ 149

“Parents are the best customers of snacks from fast-food restaurants. Householders ages 25-to-44, most with children, spend 31% to 43% more than the average household on fast-food snacks. Married couples with children at home spend two-thirds more than average on this item, the figure peaking at 82% above average among parents with school-aged children.”

New Strategist

52.10 Spending by Age

Not surprisingly, middle-aged consumers spend the most at restaurants because they have the highest incomes and typically the largest households. Overall, householders ages 35-to-54 spend 17% to 21% more than average.

Older consumers, particularly empty-nesters, are far more likely to choose full-service over quick-service restaurants.

Among householders under age 25, fast-food meals claim 60% of the restaurant budget. The fast-food share declines with age and drops below the full-service share in the 45-to-54 age group. The need to provide meal options for children is one reason for this shift in restaurant preference.

Among household types, single parents with children devote the largest share of their dining-out spending to quick-service restaurants (49%). In contrast, married couples without children at home (most of them empty-nesters) spend only 30% of their restaurant dollars at fast-food establishments.

52.11 Spending by Household Income

Affluent households spend much more than average at restaurants. Householders with incomes of \$100,000 or more spend nearly twice the average at restaurants. While accounting for only 18% of total households, the \$100,000-plus income group accounts for 36% of spending for dining out. These affluent households account for 48% of spending for dinner at full-service restaurants and 48% of spending for restaurant food while traveling.

52.12 Spending by Household Type

Married couples with school-aged or older children at home spend more eating out than any other household type – 49% to 51% more than average. Married couples without children at home spend more than average on full-service meals for all dayparts.

52.13 Spending by Race and Ethnicity

Asian households spend 18% more than the average household on restaurant meals – more than any other racial or ethnic group. Hispanic households spend 16% less than average; African-American households spend 33% less than average.

52.14 Spending by Region

Restaurant spending is highest in the West and lowest in the Midwest. Households in the Northeast are the biggest spenders on full-service dinners (14% above average) and quick-service breakfast (26% above average), but spend 15% less than average on full-service lunches.

52.15 Spending by Education

Spending on eating out rises with education, in part, because educated householders typically have higher incomes. College graduates spend 39% more than the average householder at restaurants, spending 51% to 57% above average on full-service lunches and dinners. College graduates, who comprise 29% of households, account for more than 40% of spending on full-service lunches and dinners.

52.16 Market Resources

New Strategist, 26 Austin Avenue, P.O. Box 635, Amityville, NY 11701.
(631) 608-8795. (www.newstrategist.com)

CUSTOMER PROFILE

53.1 Restaurant Visits By Age

According to The NPD Group (www.npd.com), the number of meal and snack dining-out occasions, by age, are as follows:

- Under 18: 144
- 18-to-34: 204
- 35-to-49: 219
- 50-to-64: 218
- 65 and older: 195
- All consumers: 194

“The proportion of the commercial foodservice industry’s traffic obtained from visits made by older consumers has grown steadily over the past five years while visits from Millennials have declined. Baby Boomers and Seniors are making more visits to every segment of the restaurant industry than prior to the recession.”

The NPD Group

53.2 The Full-Service Dining Customer

According to Scarborough Research (www.scarborough.com), for casual- or fine-dining restaurant patrons who dine out at least six times monthly (e.g., frequent diners), distribution by age is as follows:

- 18-to-24: 13%
- 25-to-34: 17%
- 35-to-44: 19%
- 45-to-54: 20%

- 55-to-64: 16%
- 65 and older: 16%

Frequent diners skew decidedly upscale; they are 1.7 times more likely than the total population to have a household income of at least \$150,000. Also, they are less likely to have young children; 65% of frequent diners have no kids, compared with 59% of all adults.

53.3 The Quick-Service Dining Customer

Sandelman & Associates (www.sandelman.com) provides the following profile of quick-service restaurant (QSR) customers:

Gender

- Male: 54%
- Female: 46%

Age

- 16-to-18: 6%
- 19-to-24: 18%
- 25-to-34: 21%
- 35-to-44: 27%
- 45-to-54: 19%
- 55-to-64: 9%

Marital Status

- Married: 50%
- Single: 39%
- Divorced/widowed: 11%

Household Income

- Less than \$30,000: 27%
- \$30,000 to \$39,999: 14%
- \$40,000 to \$49,999: 12%
- \$50,000 to \$74,999: 22%
- \$75,000 or more: 24%

Ethnicity

- White: 72%
- Hispanic: 11%
- Black: 10%
- All other: 8%

According to International Demographics (www.themediiaudit.com), the heaviest consumers of QSR meals are adults ages 18-to-24. Among this age demographic, 31.2% consume fast-food three or more times in a typical week. Adults ages 25-to-34 represent the second largest fast-food consumer group, with 28% eating at QSR restaurants three or more times in a typical week.

Twenty-seven percent (27%) of men eat fast-food three or more times per week, compared to 19% for women. African-Americans are among the heaviest consumers, with 31% eating at a QSR restaurant three or more times in a typical week, a figure that is 34% higher than the national average. Among households with children living at home, those who have children between the ages of 13 and 17 are the heaviest consumers of fast-food. Twenty-seven percent (27%) of households with teenagers eat fast-food three or more times per week, a figure that is 18% higher than the national average.

53.4 Regular Customers

According to the *Operator Survey*, by the National Restaurant Association (www.restaurant.org), repeat customers account for an average of 75% of sales at family-dining and quick-service restaurants, 70% of sales at casual-dining restaurants, and 60% of sales at fine-dining operations.

53.5 Families Dining Out

According to The NPD Group, families dining out with children account for 14 billion meals and snacks sold at restaurants and \$70 billion in annual sales.

Approximately 35% of restaurant visits are made by parties with kids. Of these visits, 81% are made to quick-service restaurants, 10% to casual-dining restaurants, and 9% to family-dining restaurants.

53.6 Value-Focused Customers

Consumers view 'value' differently depending upon economic conditions. *Defining Value Today*, a 2013 study by The NPD Group, reported 70% of adults said price related and non-price-related attributes are of equal importance. Non-price related attributes of the dining experience are ranked as follows:

- Service
- Ambience/atmosphere
- Portion size
- Overall quality
- Good food
- Taste

“At the onset of the recession, most restaurant-goers defined value with a single word: price. More recently, however, consumer behavior at restaurants has begun to shift, and that value definition has now come to be identified with another term: quality.”

The NPD Group
Nation's Restaurant News, 6/24/13

53.7 Market Resources

International Demographics, 10333 Richmond Avenue, Suite 200, Houston, TX 77042.
(713) 626-0333. (www.themediiaudit.com)

National Restaurant Association, 2055 L Street NW, Suite 700, Washington, DC 20036.
(202) 331-5900. (www.restaurant.org)

Sandelman & Associates, 257 La Paloma, Suite 1, San Clemente, CA 92672.
(949) 388-5600. (www.sandelman.com)

Scarborough Research, 770 Broadway, New York, NY 10003. (646) 654-8400.
(www.scarborough.com)

The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700.
(www.npd.com)

HISPANIC-AMERICAN CUSTOMERS

54.1 Overview

Census 2010 counted 50.5 million Hispanics in the United States, or 16.3% of the total population. The nation's Latino population, which was 35.3 million in 2000, grew 43% over the decade. The Hispanic population also accounted for 56% of the nation's growth from 2000 to 2010.

While some regions of the U.S. have long had a high concentration of Hispanic-Americans, such as Florida and the states bordering Mexico, the influx into other areas has been rapid. In the Pacific Northwest, for instance, the Hispanic population increased 71% between the 2000 and 2010 censuses. In such regions, restaurateurs have begun to develop programs that properly cater to the changing population mix.

54.2 Hispanic Restaurant Patronage

Garcia Research Associates (www.garciaresearch.com) found the pattern of restaurants visits by English-speaking Hispanic-Americans is virtually the same as that of non-Hispanics. Dining patterns, however, vary for less-accultured Hispanic-Americans who speak only or mostly Spanish. The following is the daytime restaurant traffic distribution among these three groups:

	Non-Hispanics	English-Speaking Hispanics	Less Acculturated Hispanics
• Lunch:	35%	34%	23%
• Supper:	33%	32%	24%
• Morning meal:	18%	18%	31%
• P.M. snack:	15%	15%	22%

According to *National Eating Trends Hispanic*, a June 2013 report by The NPD Group (www.npd.com), Hispanics account for 32% of lunch visits at restaurants.

“With lunch being the largest meal of the day for U.S. Hispanics, there is a greater diversity of foods prepared by Hispanics compared to non-Hispanics. For example, while sandwiches are the top items for Hispanics, they are only present at 18% of afternoon meals (38% for non-Hispanics). Sandwiches are very closely followed by soup and rice as top dishes during the afternoon meal. In fact, 13% of Hispanics’ afternoon meals include rice, compared to just 1% for non-Hispanics.”

The NPD Group, 6/18/13

According to *Hispanic Foodservice Consumer Trend Report*, published in April 2013 by Technomic (www.technomic.com), less-acculturated consumers are twice as likely as more-acculturated Hispanics to look for Hispanic foods (39% and 20%, respectively) and flavors (45% and 20%, respectively) at American-style restaurants. Twice as many Hispanics (44%) compared to the general population (21%) say they would pay more for food described as authentic.

Sixty-three percent (63%) of Hispanics say that restaurants are an ideal place to spend quality time with family, compared with 52% of non-Hispanics. More Hispanic consumers (46%) than the general population (33%) say that a family-friendly atmosphere is one of the most important restaurant attributes they look for when deciding where to eat.

“Hispanics stand out from other restaurant goers, especially in terms of the high importance they place on family-friendly amenities and ambiance, flavor authenticity, and recognizing their culture.”

Darren Tristano
Executive Vice President
Technomic, 4/22/13

Hispanics are much more likely to have children with them than non-Hispanics. The following are percentages of restaurant visits by customers dining children with them (source: The NPD Group):

- Less acculturated Hispanics: >50%
- English-speaking Hispanics: 33%
- Non-Hispanics: 29%

54.3 Hispanic Menu Preferences

A panel on “Developing Products for the Hispanic Market” at a conference of the Research Chefs Association (www.culinology.com) discussed Hispanic-focused menu trends. The following is a summary of comments made by leading chefs:

- Hispanics like a lot of flavor in their food and value the presentation on the plate, according to Fernando Desa, executive chef at Goya Foods.
- According to Jonathan Rogan, executive chef of El Pollo Loco, value, flavor, and perceived healthfulness are the three main pillars of restaurant cuisine that appeal to the Hispanic consumer. The Hispanic population is more prone to diabetes than the general population, so restaurants need to offer some healthful options.
- Hispanic customers value an authentic restaurant experience. According to Mark Miller, chef and restaurant consultant, “When you look at the Hispanic marketplace, you have to be very careful that you aren’t selling a product without that product being designed for their culture, for their social-psycho dynamic, and for their value system.”
- Peruvian is poised to be the “next big thing” among Hispanic-American consumers. A fusion of Asian cuisine with a little Spanish cuisine, Peruvian cuisine is very tropical and refreshing with a wide variety of chilies and a lot of freshness with fish preparations. Elizabeth Johnson-Kossick, chef instructor and Latin cuisine specialist at the Culinary Institute of America’s San Antonio campus, pointed out that Peruvian food also has a lot of visual freshness and flavor profiles with pepper pastes.

MILLENNIAL CUSTOMERS

55.1 Overview

Most analysts classify those born from 1982 thru 2000, a span of 20 years, as the Millennial generation (also known as Generation Y or Echo Boomers). In 2013, Millennials spanned ages 13 through 31. Census 2010 counted 93.40 million Americans born between 1980 and 2000, representing 30.3% of the population. Some analysts extend the upper bound of the Millennial generation to 1976, including those turning 38 in 2014.

Already the largest generation in the U.S., immigration will boost the number of Millennials to nearly 90 million by 2020, according to the U.S. Census Bureau.

55.2 Restaurant Visits By Millennials

According to The NPD Group (www.npd.com), Millennials average 204 meal and snack dining-out occasions at restaurants in 2013, 49 fewer visits than in 2009, a 16% drop from 2009. For comparison, adults ages 35-to-64 average 219 restaurant visits.

“For reasons as varied as the economic downturn and a heightened interest in local foods, a significant shift in eating patterns is under way among the Millennials, those 18-to-30. Oddly, at least by historic trends, they are eating out less than the Baby Boomers did at that age. Many in the restaurant business worry that it may be impossible to reverse the decline, which affects 50 million to 60 million young people.”

The New York Times, 6/7/13

55.3 Dining Out

In a May 2013 survey by the Urban Land Institute (ULI, www.uri.org), Millennials reported dining out as follows:

Breakfast	Total	Men	Women
• At least once a week:	22%	28%	15%
• A few times a month:	16%	18%	15%
• Rarely or never:	62%	54%	70%

Lunch			
• At least once a week:	36%	44%	28%
• A few times a month:	35%	32%	38%
• Rarely or never:	29%	25%	34%

Dinner			
• At least once a week:	38%	45%	31%
• A few times a month:	42%	35%	48%
• Rarely or never:	20%	20%	20%

Weekend Brunch			
• At least once a week:	16%	22%	11%
• A few times a month:	17%	19%	15%
• Rarely or never:	67%	59%	74%

African-American and Hispanic Millennials dine out more frequently than the general Millennial population. The comparison is as follows:

Breakfast	Total	African-American	Hispanic
• At least once a week:	22%	34%	31%
• A few times a month:	16%	18%	20%
• Rarely or never:	62%	48%	50%

Lunch			
• At least once a week:	36%	43%	45%
• A few times a month:	35%	32%	32%
• Rarely or never:	29%	25%	23%

Dinner			
• At least once a week:	38%	39%	45%
• A few times a month:	42%	40%	36%
• Rarely or never:	20%	20%	16%

Weekend Brunch			
• At least once a week:	16%	24%	25%
• A few times a month:	17%	19%	20%
• Rarely or never:	67%	57%	54%

55.4 Preferred Restaurants For Dinner

When asked in the ULI survey their preferred restaurant to go for dinner, responses were as follows:

	Total	Men	Women
• Hot new restaurant:	12%	13%	10%
• Favorite local/neighborhood place:	40%	44%	37%
• Casual chain restaurant:	31%	27%	35%
• Fast-casual restaurant:	10%	8%	12%
• Fast-food:	7%	8%	7%

By ethnicity, responses were as follows:

	Total	African-American	Hispanic
• Hot new restaurant:	12%	14%	17%
• Favorite local/neighborhood place:	40%	28%	40%
• Casual chain restaurant:	31%	38%	27%
• Fast-casual restaurant:	10%	11%	9%
• Fast-food:	7%	10%	6%

55.5 Dining Priorities

Millennials Food Study, published in August 2013 by BBDO Atlanta (www.bbdoatl.com), reported on a survey of Millennials regarding their priorities when dining out. The following is a summary of findings:

- For Millennials, the food itself is the number-one contributor to restaurant loyalty, and consuming tasty fast-food clearly co-exists with their interest in staying on top of current food trends and finding new places with unique flavors and “great atmosphere.”
- Sixty-two percent (62%) of Millennials would rather be taken to dinner at their favorite restaurant than have a gourmet dinner prepared for them at home.
- Sixty-percent (60%) say they would pay more for great food at the expense of great service.
- Forty-eight percent (48%) of Millennials describe themselves as “foodies.” Among Millennial foodies, 60% say they eat fast-food at least once a week, compared with 48% of all adults who do so.
- When asked how their food choices will likely change over the next five years, 44% say they want to be more adventurous about their food choices. Thirty-eight percent (38%) would like to be able to create their own meals.
- Eighty-eight percent (88%) of Millennials use their smartphones at the dinner table, but 44% say they hate it when others do the same.
- Healthy eating is a priority among Millennials.

“Health is always top-of-mind among Millennials, and, like older consumers, they often feel conflicted about eating out for this reason. Female Millennials, older Millennials (ages 25-to-35), married Millennials, and Millennials with children all report that they feel guilty if they eat out more than two or three times a week. Those who self-identify as ‘curvy’ say they won’t budge on flavor, but they’re looking for healthier options and checking out the nutrition information on menus.”

Rich Santiago, Senior V.P.
BBDO Atlanta
Marketing Daily, 8/8/13

- Millennials are much more influenced by their friends’ opinions of a restaurant than by reviews on sites like Yelp. If their friends like it, they’ll go. And If they like it, they’ll share pictures and their own reviews of it.
-

“Millennials view food as a form of self-expression and entertainment, associating it with personal story-telling. They Instagram what they eat, follow food celebrities on Twitter, and try new places ranging from the trendy to neighborhood holes-in-the-wall.”

Rich Santiago, Senior V.P.
BBDO Atlanta
Marketing Daily, 8/8/13

55.6 Favorite Chain Restaurants

In August 2013, Concentric Marketing (www.getconcentric.com) published a survey-based assessment of Millennials' views on topics ranging from brand preferences to eating habits. Millennials ranked their favorite chain restaurants as follows (percentage of respondents):

Casual-Dining

- | | |
|--|-----|
| • Olive Garden: | 37% |
| • Cheesecake Factory: | 22% |
| • Buffalo Wild Wings: | 21% |
| • Applebee's Neighborhood Grill & Bar: | 17% |
| • Chili's Grill & Bar: | 15% |

Quick-Service

- | | |
|--------------------------------|-----|
| • Subway: | 47% |
| • Chick-fil-A: | 42% |
| • Chipotle Mexican Grill: | 38% |
| • McDonald's: | 34% |
| • Taco Bell: | 32% |
| • Wendy's: | 28% |
| • Five Guys Burgers and Fries: | 23% |
| • Domino's Pizza: | 19% |
| • Papa John's Pizza: | 18% |
| • Burger King: | 13% |

SOCIAL NETWORKING

56.1 Overview

Interacting with customers on social networks has become an important aspect of brand-building for restaurants.

“Social media is the great equalizer, allowing smaller brands to battle the largest players in the restaurant industry for the attention – and hopefully the dining out dollars – of consumers.”

Nation’s Restaurant News

DigitalCoCo (www.digitalcoco.com), a social media analytics and digital branding firm, tracks the social media activities of consumers related to restaurant brands. DigitalCoCo has tracked over 53 million U.S. consumers and their social media relationships with 7,189 restaurant brands at 210,710 U.S. locations. The company also monitors restaurant brand-related social media activity in Canada, Europe, and the Middle East.

Annually, DigitalCoCo presents The Restaurant Social Media Index (RSMI, <http://rsminindex.com/>). This chapter presents the RSMI as well as other metrics of social media engagement by restaurant patrons.

56.2 Restaurant Social Media Index

The Restaurant Social Media Index is an assessment of the social media presence of restaurants based on tracking of three primary areas: Influence, Sentiment, and Engagement. Each category is cross-referenced to a weighted scale and advanced Social Insights Algorithm that provides a level playing field for all brands participating, big or small.

The following restaurant brands had the strongest overall social media presence

(3rd Quarter 2013):

1.	Chipotle:	245.91
2.	Wendy's:	243.60
3.	Taco Bell:	241.61
4.	Starbucks:	240.87
5.	McDonald's:	240.26
6.	Buffalo Wild Wings:	239.18
7.	Subway:	235.42
8.	Hard Rock Cafe:	229.62
9.	Sonic Drive-in:	229.43
10.	Jimmy John's:	228.75
11.	Firehouse Subs:	226.87
12.	Panera Bread:	222.47
13.	Sweetgreen:	220.00
14.	Shake Shack:	220.97
15.	Pizza Hut:	220.88
16.	Chick-fil-A:	220.68
17.	Cheesecake Factory:	220.37
18.	Red Mango:	217.80
19.	Bonefish Grill:	217.67
20.	Dunkin' Donuts:	217.04
21.	Smashburger:	216.25
22.	Red Robin Gourmet Burgers:	215.29
23.	Peet's Coffee & Tea:	213.63
24.	Jason's Deli:	210.66
25.	Papa John's Pizza:	209.80
26.	Pinkberry:	209.57
27.	AJ Bombers:	208.81
28.	Tijuana Flats:	208.70
29.	Cinnabon:	207.93
30.	Tender Greens:	207.15
31.	McAlister's Deli:	206.91
32.	Specialty's Café & Bakery:	206.21
33.	Outback Steakhouse:	206.11
34.	La Boulange Bakery:	205.38
35.	Boudin Sourdough Bakery & Cafe:	205.25
36.	Jamba Juice:	205.08
37.	Texas Road House:	204.40
38.	Wingstop:	204.29
39.	Capital Grill:	203.88
40.	Five Guys Burgers and Fries:	203.69
41.	Applebee's:	203.64
42.	Wow Bao:	203.30
43.	Moes Southwest Grill:	203.25

44.	Yard House:	202.58
45.	Piada Italian Street Food:	201.50
46.	Domino's Pizza:	201.25
47.	California Pizza Kitchen:	200.28
48.	Noodles & Company:	199.78
49.	Hooters:	199.62
50.	Nando's Peri-Peri:	198.33
51.	Maggiano's Little Italy:	197.94
52.	Cava Mezze:	197.01
53.	Dairy Queen:	196.10
54.	Which Wich?:	196.00
55.	Raising Cane's:	195.89
56.	Arby's:	195.74
57.	Caribou Coffee:	194.84
58.	Carl's Jr.:	194.16
59.	Schlotzsky's:	193.76
60.	Salsarita's Fresh Cantina:	193.49
61.	KFC:	193.39
62.	Veggie Grill:	192.66
63.	Chili's:	192.45
64.	Lime Fresh Mexican Grill:	191.71
65.	Whataburger:	191.29
66.	Native Foods Café:	190.68
67.	The Cheese Course:	190.66
68.	The Coffee Bean & Tea Leaf:	190.18
69.	Qdoba Mexican Grill:	190.00
70.	El Pollo Loco, Inc.:	189.94
71.	Yogurtland:	189.29
72.	Burger King:	189.27
73.	Twisted Root Burger:	189.03
74.	Quiznos:	189.00
75.	Sbarro:	188.60
76.	On The Border Mexican Grill & Cantina:	188.23
77.	Anthony's Coal Fired Pizza:	188.07
78.	Rubio's Fresh Mexican Grill:	187.03
79.	Souplantation and Sweet Tomatoes:	186.84
80.	Habit Burger Grill:	186.53
81.	Wolfgang Puck:	186.45
82.	Freshii:	185.20
83.	P.F. Chang's:	185.02
84.	Mellow Mushroom:	184.97
85.	Capriotti's Sandwich Shop:	184.73
86.	Uno Chicago Grill:	184.56
87.	Jimmy's Kitchen:	184.18

88.	Zaxby's Restaurant:	184.15
89.	In-N-Out Burger:	184.13
90.	Famous Daves Bar-B-Que of America:	184.03
91.	Alamo Drafthouse:	183.85
92.	Taco John's:	183.72
93.	Brio Tuscan Grille:	183.54
94.	Tasti D-Lite:	183.51
95.	Hardee's:	183.49
96.	Jersey Mike's Subs:	183.06
97.	Le Pain Quotidien:	183.05
98.	The Protein Bar:	183.04
99.	Zoup Soup!:	182.93
100.	Zöes Kitchen:	182.60
101.	Johnny Rockets:	182.42
102.	Mod Market:	182.30
103.	Rainforest Cafe:	182.21
104.	The Counter Burger:	182.11
105.	Buca di Beppo:	181.85
106.	Baskin-Robins:	181.40
107.	Boloco:	181.08
108.	Olive Garden:	181.04
109.	Twin Peaks:	180.76
110.	Einstein Bros Bagels:	180.52
111.	Pei Wei:	180.38
112.	Truluck's Seafood:	180.35
113.	Krispy Kreme:	180.31
114.	La Madeleine:	180.30
115.	Xoco:	180.26
116.	Penn Station Subs:	180.25
117.	Romano's Macaroni Grill:	180.06
118.	Rita's Italian Ice:	179.91
119.	Denny's:	179.59
120.	White Castle:	179.29
121.	Auntie Anne's:	178.90
122.	Little Caesars Pizza:	178.39
123.	Free Birds World Burrito:	178.33
124.	Jack In The Box:	177.62
125.	Kapow Noodle Bar:	177.57
126.	Coldstone Creamery:	177.57
127.	Taco Cabana:	177.33
128.	T.G.I. Friday's:	177.26
129.	Tilted Kilt Franchise Operating, LLC:	177.10
130.	Bar Louie:	176.82
131.	Pizza Fusion:	176.75

132. Monical's Pizza:	176.58
133. IHOP Restaurants:	176.56
134. Chop't Creative Salad Co.:	176.48
135. Original Joe's:	176.41
136. Corner Bakery Cafe:	176.24
137. Elephant Bar Restaurants:	175.94
138. California Tortilla:	175.89
139. Caja Fresh:	175.74
140. Benihana:	175.62
141. BJ's Restaurant & Brewhouse:	175.51
142. Offerdahl's Café Grill:	175.41
143. The Melting Pot Restaurants, Inc.:	175.35
144. Potbelly Sandwich Shop:	174.56
145. Mimi's Cafe:	174.11
146. Wildflower Bread Co.:	174.03
147. Popeyes Chicken:	173.64
148. Genghis Grill:	173.62
149. Seasons 52:	173.56
150. Dave & Busters:	173.32
151. Kaldi's Coffee:	173.32
152. Texas Steakhouse & Saloon:	173.16
153. BD's Mongolian Grill:	172.91
154. Red Lobster:	172.60
155. Tony Roma's:	171.43
156. MAD Greens:	171.24
157. 800 Degrees Pizza:	171.14
158. Zinburger:	171.09
159. Cracker Barrel:	170.52
160. Pie Five Pizza:	170.31
161. HuHot Mongolian Grill:	170.30
162. Morton's The Steakhouse:	170.09
163. Bruegger's Bagels:	169.69
164. Mama Fu's Asian House:	169.68
165. Au Bon Pain:	169.67
166. Fatburger:	169.39
167. Tropical Smoothie Cafe:	169.16
168. Golden Corral:	168.84
169. Cousins Subs:	168.83
170. LYFE Kitchen:	168.53
171. Rosati's Pizza:	168.45
172. A&W Restaurants, Inc.:	168.42
173. Del Taco:	168.29
174. Steak 'n Shake:	168.28
175. Paradise Bakery:	168.28

176. Taco Bueno:	167.45
177. Panda Express:	167.42
178. Village Burger Bar:	166.57
179. Krystal:	166.33
180. Dickey's Barbecue Pit:	166.24
181. Bubba Gump Shrimp Co.:	166.21
182. Wawa:	166.13
183. MOOYAH Burgers, Fries & Shakes:	165.68
184. Whiskey Girl:	165.64
185. Ruby Tuesday:	164.77
186. Robeks:	164.45
187. Culver's Restaurants:	164.40
188. Cosi:	164.38
189. Bertucci's:	164.26
190. Fuddruckers:	164.14
191. Uncle Maddio's:	163.98
192. Boombozz Pizza:	163.80
193. Eat 'N Park:	163.48
194. McCormick & Schmick's Seafood Restaurants:	163.35
195. Muscle Maker Grill:	163.18
196. 100 Montaditos:	163.16
197. Blanc Burgers:	162.74
198. Z'Tejas Southwestern Grill:	162.35
199. Freddy's Frozen Custard and Steakburgers:	162.12
200. Legal Sea Foods:	161.85
201. YEAH! BURGER:	161.26
202. Bob Evans:	160.81
203. Coffee Beanery:	159.16
204. Wienerschnitzel:	158.85
205. Boston Market:	158.41
206. Blaze Pizza:	157.29
207. Harry Caray's Italian Steakhouse:	157.10
208. Pita Pit USA:	156.71
209. 5 Napkin Burger:	156.57
210. BRAVO! Cucina Italiana:	156.49
211. Earl of Sandwich:	156.11
212. Boulder Baked:	156.07
213. Naked Pizza:	155.60
214. Nature's Table:	155.25
215. Quaker Steak & Lube:	154.76
216. 8 Oz Burger Bar:	154.70
217. Pacific Catch:	154.11
218. Jimmy Buffett's Margaritaville Caribbean:	154.05
219. Stir Crazy:	153.71

220. Longhorn Steakhouse:	153.33
221. Tokyo Joe's:	152.69
222. Phillips Seafood:	152.56
223. Garbanzo's:	151.76
224. Smoothie King:	151.39
225. Daphne's Greek Cafe:	151.30
226. CRAVE Restaurant:	151.08
227. Pizzology Craft Pizzeria:	151.01
228. BGR The Burger Joint:	150.73
229. Church's Chicken:	150.39
230. Epic Burger:	150.17
231. Kona Grill:	149.86
232. Garlic Jim's Famous Gourmet Pizza:	149.63
233. Pacific Grill Tacos:	149.49
234. Zpizza:	149.05
235. Burger Lounge:	148.95
236. Wild Wing Cafe:	148.09
237. TCBY:	148.07
238. Duffy's Sports Grill:	147.51
239. Searsucker:	147.36
240. Captain D's Seafood Kitchen:	146.95
241. Austin Java:	146.63
242. New York Burger Co.:	146.41
243. Costa Vida Fresh Mexican Grill:	146.30
244. Fazoli's:	146.15
245. Steak 954:	146.11
246. SPIN! Neapolitan Pizza:	145.78
247. Shoney's:	145.70
248. First Watch:	144.39
249. Grand Traverse Pie Company:	144.19
250. Burger & Beer Joint:	143.92

56.3 Top Mobile Brands

For Mobile Brands, three variables across 85,000+ terms, including Food, Service, and Overall Brand Experience were assessed, with scores as follows (3rd Quarter 2013):

• Firehouse Subs:	86.210
• Starbucks:	84.110
• Chipotle:	83.323
• Shake Shack:	82.090
• Specialty's Café & Bakery:	77.820
• Buffalo Wild Wings:	77.218
• Wendy's:	76.226

• Subway:	75.717
• Wow Bao:	75.504
• Jimmy John's:	74.621
• Einstein Bros Bagels:	74.214
• Chick-fil- A:	73.968
• Taco Bell:	73.827
• Pinkberry:	73.803
• McAlister's Deli:	73.788
• Panera Bread:	73.688
• McDonald's:	73.538
• Peet's Coffee & Tea:	73.316
• Sonic Drive-in:	73.240
• Smashburger:	73.187
• Noodles & Company:	72.255
• Native Foods Café:	72.134
• Raising Cane's:	72.023
• Cheesecake Factory:	71.375
• Moe's Southwest Grill:	71.268

56.4 Top Social Engagement

Based on metrics of direct engagement, the following are Social Engagement scores (3rd Quarter 2013.):

• Wendy's:	88.70
• Taco Bell:	88.17
• Starbucks:	85.39
• McDonald's:	84.00
• Buffalo Wild Wings:	82.98
• Chipotle:	81.08
• Firehouse Subs:	80.99
• Hard Rock Cafe:	80.11
• Subway:	78.80
• Jimmy John's:	77.48
• Nandos Peri-Peri:	77.36
• Bonefish Grill:	77.22
• Pizza Hut:	76.71
• Capital Grill:	76.58
• Sonic Drive-in:	76.31
• Panera Bread:	76.22
• Chick-fil- A:	75.68
• Cheesecake Factory:	75.44
• Shake Shack:	75.28
• Red Mango:	75.22
• Sweet Green:	74.99

- Caribou Coffee: 74.92
- Specialty's Café & Bakery: 74.80
- Boudin Sourdough Bakery & Café: 74.62
- Tijuana Flats: 74.30

56.5 Top Social Sentiment

Social Sentiment is based on three variables across 60,000+ terms. Variables are Food, Service, and Overall Brand Experience, with scores as follows (3rd Quarter 2013):

- Shake Shack: 84.090
- Chipotle: 84.020
- Subway: 78.030
- Sweetgreen: 78.020
- Sonic Drive-in: 77.620
- Xoco: 77.620
- Buffalo Wild Wings: 77.418
- Bonefish Grill: 77.090
- Starbucks: 75.950
- Wendy's: 75.387
- The Protein Bar: 75.090
- Smashburger: 74.765
- Cheesecake Factory: 74.631
- Chick-fil- A: 74.099
- Taco Bell: 74.090
- Penn Station Subs: 74.090
- 800 Degrees Pizza: 73.090
- Schlotzsky's: 72.990
- Panera Bread: 72.988
- Einstein Bros Bagels: 72.822
- Noodles & Company: 72.463
- McAlister's Deli: 72.463
- Red Robin Gourmet Burgers: 72.457
- La Boulange Bakery: 72.330
- Jimmy John's: 71.936

56.6 Location-Based Activities

Launched in 2012 by VenueTrak, more than 3.5 billion location-based actions (LBAs) are now tracked by restaurant consumers. Density, frequency, return & refer, and sentiment from a location-based action are measured to add up to a total max score of 100 basis points. Scores are as follows (3rd Quarter 2013):

• Chipotle:	82.783
• Buffalo Wild Wings:	78.464
• Shake Shack:	77.459
• Subway:	77.370
• Wendy's:	75.846
• Sweetgreen:	75.510
• Starbucks:	75.115
• Taco Bell:	74.916
• Tijuana Flats:	74.674
• Chick-fil- A:	74.167
• McDonald's:	73.973
• Panera Bread:	73.814
• Cheesecake Factory:	73.766
• Sonic Drive-in:	73.665
• Jimmy John's:	73.313
• Wow Bao:	73.274
• Pizza Hut:	72.789
• Specialty's Café & Bakery:	72.497
• Raising Cane's:	72.063
• McAlister's Deli:	71.718
• Bonefish Grill:	71.403
• Smashburger:	71.370
• Zoës Kitchen:	71.243
• Hard Rock Cafe:	71.035
• Peet's Coffee & Tea:	70.863

56.7 Market Resources

DigitalCoCo, 330 SW 2nd Street, Suite 103, Ft. Lauderdale, FL 33301. (954) 416-3028.
(www.digitalcoco.com)

PART VIII: DAYPARTS & MEALPARTS

DAYPARTS

57.1 Daypart Spending and Traffic

According to *Consumer Spending Survey*, by the Bureau of Labor Statistics (www.bls.gov), consumer spending in restaurants by daypart is distributed as follows:

- Dinner: 46%
- Lunch: 30%
- Dining while traveling: 10%
- Breakfast: 9%
- Snacks: 5%

Distribution of total restaurant traffic, including takeout and delivery, is as follows (sources: The NPD Group [www.npd.com] and *Nation's Restaurant News*):

- Morning meal: 21%
- Lunch: 34%
- Dinner: 31%
- P.M. snacks: 14%

Various assessments of restaurant patrons recognize that few eat the traditional three meals each day. Consumers increasingly eat one or two formal meals and snack throughout the day. This trend is discussed in Chapter 78.

57.2 Breakfast

According to NPD, the breakfast category is a \$50 billion market, with more than 12.5 billion visits to restaurants at breakfast time. Overall, 21% of all restaurant visits are for breakfast.

In its report *A Look into the Future of Foodservice*, NPD projected more growth in guest counts at the morning meal, forecasting a 7% increase in breakfast traffic over the next nine years. Quick-service brands' morning traffic is projected by NPD to grow 9% over that time.

The distribution of restaurant traffic for the breakfast daypart, by customer age, is as follows (source: The NPD Group):

- Under age 18: 12%
- 18-to-24: 9%
- 25-to-34: 18%

- 35-to-49: 28%
- 50-to-64: 22%
- 65 and older: 11%

Technomic's (www.technomic.com) *Breakfast Consumer Trend Report* found the following trends for breakfast day-part patronage:

- Limited-service breakfast customers place high importance on value menus, breakfast sandwiches and portability, while full-service customers are most interested in variety, all-day breakfast options and signature meal offerings.
- Coffee is key: 64% of consumers drink coffee at breakfast; 54% of these consumers prefer a restaurant that offers free coffee refills; and 30% say that they are loyal to concepts that serve their preferred brand of java.
- Consumers link breakfast with health: 63% of consumers feel it is unhealthy to skip breakfast; open-ended data shows that many consumers want more healthful breakfast options.

The Top 10 items consumed at breakfast are as follows (source: The NPD Group):

- Coffee: 14.7%
- Cold cereal: 13.6%
- Fruit juice: 10.5%
- Milk: 7.3%
- Bread: 6.6%
- Eggs: 6.1%
- Fruit: 6.0%
- Hot cereal: 3.8%
- Tea: 2.5%
- Sandwiches: 2.2%

The following are the primary reasons adults select a restaurant for breakfast (sources: Mintel and *Nation's Restaurant News*):

Weekdays

1. Low price
2. Quality of breakfast items
3. Menu variety
4. Convenience of location
5. Speed of service

Weekends

1. Quality of breakfast items
2. Menu variety
3. Low price
4. Convenience of location
5. Relaxing atmosphere

Although breakfast is increasing in popularity for out-of-home meals, only 20% of people report eating breakfast away from home more often compared with a year ago. Cold cereal, fruit, juice, toast, and hot cereal comprised more than 3.3 billion breakfast foods eaten from home on the go.

57.3 Lunch

When adults were asked in a survey where they usually had lunch, responses were as follows (source: *USA Today*):

- Home: 48%
- Desk at work: 32%
- Restaurant: 6%
- Car: 5%
- Other: 9%

Although lunch comprises the largest percentage of restaurant visits, at 34%, lunch traffic has been on the decline for several years. The decline is attributed, in large part, to workers having less time for lunch during the workday; 81% of workers say they have less time for lunch because of their work schedule or recent increases in their workload.

By restaurant category, lunch traffic at restaurants is distributed as follows (source: The NPD Group):

- Hamburger: 28%
- Other sandwich: 10%
- QSR pizza: 7%
- QSR Mexican: 5%
- Mid-scale varied menu: 4%
- QSR varied menu: 4%
- Casual-dining bar and grill: 3%
- Chicken: 3%
- Convenience stores: 3%
- Deli: 3%
- QSR Asian: 3%
- Casual-dining varied menu: 2%
- Family style: 2%
- Bakery sandwich: 1%
- Casual-dining Mexican: 1%
- Gourmet coffee/tea: 1%
- Grill/buffet: 1%
- Mid-scale Asian: 1%
- All other: 17%

Tacos, deli sandwiches, and combo meals have gained in popularity during lunchtime. And like the restaurant industry as a whole, more consumers are requesting

more healthful fare for their midday meals, with meals with lower calories being the most sought after goal for lunch.

57.4 Dinner

Second only to lunchtime restaurant visits, dinner accounts for 31% of patronage at restaurants. Year-over-year visits from December 2012 to December 2013, however, dropped by 1%.

Results from three recent studies by The NPD Group arrived at the same finding: the dinner occasion at restaurants continues to decline.

National Eating Trend found the dinner daypart suffered a per capita drop of 15 fewer restaurant dinners compared to in-home suppers between 2006 and 2012. NPD's Consumer Reports on Eating Share Trends (CREST®), which tracks daily how U.S. consumers use restaurants, saw away-from-home dinners decline from 67 per capita to 61 in 2012. *A Look Into the Future of Foodservice*, however, forecasts a recovery from the drop, with growth at 4% growth for the daypart through 2022 from a deficit 3.3% in 2012.

Dinner and Late-Night Consumer Trend Report, published in 2012 by Technomic, found 40% of consumers had cut back on away-from-home dinner purchases compared with two years prior, largely because they had less money to spend on dining out. When weighing dine-out options, consumers were more likely to choose restaurants based on the availability of frequent diner programs (31% vs. 23%) and happy hour deals (24% vs. 21%) than two years prior.

Technomic also found that 71% of consumers skip dinner at least sometimes, primarily because of the lack of hunger or eating a late lunch instead of dinner.

The distribution of restaurant traffic for the dinner daypart, by customer age, and change from 2001, is as follows (source: The NPD Group):

	Supper Meal Occasions	Share of Traffic	Change From 2001
• 18-to-31:	66	28%	-13%
• 32-to-43:	63	19%	- 7%
• 44-to-51:	60	20%	- 7%
• 52-to-61:	56	16%	- 7%
• 62 and older:	49	17%	1%

In the short term, demographic trends do not bode well for growth in dinner traffic at restaurants, according to *A Look Into The Future of Foodservice*. The report found those ages 18-to-49, the most frequent age group of suppertime diners, were the most impacted by the economic downturn and have yet to increase their dinner occasions since cutting back. Though older consumers have increased their restaurant dinner occasions, they haven't offset the losses from the cutbacks by their younger counterparts.

Among patrons dining out for supper, the following are the primary reasons they select a restaurant for dinner (sources: Mintel and *Nation's Restaurant News*):

- Want to order something great: 59%
- Want to satisfy my hunger: 35%
- Want to treat myself to a big meal: 25%
- Want to eat a healthful meal: 23%
- Cheap items on the menu: 9%
- Want a meal that won't fill me up too much: 9%
- None of the above: 7%

LATE-NIGHT HOURS

58.1 Overview

Some family-dining chains such as Denny's, IHOP, Steak 'n Shake, and Waffle House have long had late-night service. Several years ago, many quick-service restaurants began operating with extended hours. More than 95% of McDonald's restaurants now have extended hours; several thousand are open 24 hours. More recently, casual-dining chains have been extending operating hours.

In spite of the shift by more restaurants to the late-night daypart, overall restaurant traffic after 9 p.m. fell by 15% between August 2008 and August 2013, according to The NPD Group (www.npd.com). Similarly, point-of-sale analyzed by GuestMetrics (www.guestmetrics.com) showed a 10.3% decline in late-night dining at full-service restaurants in October 2013, compared with a year prior.

“We believe this is a further sign of a broad consumer base that remains under significant economic pressure and likely choosing to end their nights earlier in order to save money.”

GuestMetrics
Nation's Restaurant News, 11/18/13

At just 5% of restaurant visits, the late-hour daypart presents opportunities for innovative operators.

58.2 Late-Night Customer Demographics

According to Technomic (www.technomic.com), late-night hours appeal to patrons of various age demographics as follows:

- 18-to-24: 66%
- 25-to-34: 56%
- 35-to-44: 50%
- 45-to-54: 48%
- 55 and older: 43%

“[Late-night] customers range from factory third-shift employees to teenagers coming home from parties.”

John Dillon, Vice President
Denny's
Nation's Restaurant News

58.3 Late-Night Operations

The following are operational characteristics of some restaurants that maintain late-night hours:

- McDonald's began experimenting with a late-night menu that combines from different meal times, like Egg McMuffins with Big Macs and hot cakes with Chicken McNuggets.
- Jack in the Box launched Jack's Munchie Meal for its after midnight menu. This meal in a box includes two tacos, choice of fries, a 20-ounce drink, with the choice of one of four entrees.
- At Denny's, servers working from 10 p.m. to 5 a.m. wear jeans and T-shirts instead of black pants and collared shirts. Alternative music is played during those hours, and a special late-night-only menu is offered. Forty-seven percent (47%) of late-night customers at Denny's are under age 24; two-thirds are coming from spots like night clubs or bowling alleys.
- Smokey Bones Bar & Fire Grill, a 68-unit casual-dining chain, keeps its recently remodeled restaurants open until midnight and 2 a.m., depending on the market, and offers a special late-night menu. Bar business makes up half of sales between 10 p.m. and 2 a.m., compared with 15% to 18% during lunch and dinner.

MEALPARTS

59.1 Appetizers

According to an October 2013 assessment by Technomic (www.technomic.com), 38% of consumers order appetizers on all or most of their restaurant visits, an increase from 27% who did so in 2009. Fifty-nine percent (59%) say they tend to eat items labeled as “appetizers” as starters to their meals.

GuestMetrics (www.guestmetrics.com), which analyzes point-of-sale data from independent full-service restaurants, reports that sales of appetizers (excluding soups and salads) increased 3.3% in 2013, compared with the prior year.

“For full-service restaurant operators looking to improve their food sales, appetizers might be the way to go. Picking the right appetizers is crucial. They should be items that are distinctive enough to get customers’ attention, but not so strange that guests don’t know whether they’ll like them or not. Shareable items are gaining in popularity.”

Nation’s Restaurant News, 7/22/13

59.2 Dessert

According to The NPD Group (www.npd.com), 10.4% of meals ordered at restaurants include dessert.

An October 2013 report by Technomic provided the following characteristics of restaurant dessert sales:

- Seventy percent (70%) of consumers eat dessert after a meal at least once a week.
- At full-service restaurants, 44% of desserts are shared; at limited-service restaurants that figure is 29%.

- Thirty-six percent (36%) of adults say they are more likely to order dessert if a miniature option is available.
- Seventy-eight percent (78%) of people say they are more likely to eat dessert when they want to reward or treat themselves.

59.3 Salads

According to GuestMetrics, sales of salads at independent full-service restaurants declined 1% in 2013, compared with the prior year.

In a 2013 survey by Technomic, 43% of adults say they visit certain restaurants because they enjoy their salad offerings.

Twenty-one percent (21%) of restaurant patrons say they purchase salads because they want to try something different. This is particularly true for main-course salads.

“Main-course salads are gaining traction on restaurant menus, as consumers seek out light and healthful meals and chefs embrace the dish as a blank canvas for culinary creativity.”

Nation's Restaurant News

59.4 Sides

In an October 2013 survey by Technomic, 59% of adults said they often choose entrees based on the sides they come with. Forty-six percent (46%) said they are less likely to order an entree if it comes with a side they don't like.

“Side dishes, the supporting cast of restaurant menus, often in the shadow of center-of-the-plate stars, are increasingly finding their way into the spotlight. And with some premium sides priced at more than \$8, operators find they are an effective way to get guests to spend a little more.”

Nation's Restaurant News, 5/13/13

59.5 Soups

According to GuestMetrics, sales of soups at independent full-service restaurants declined 0.3% in 2013, compared with the prior year. The NPD Group, however, reported that sales of soup shipped through broadline distributors to foodservice operators increased by more than 2% in 2013.

In a 2013 survey by Technomic, 46% of adults say they visit certain restaurants because they enjoy their soup offerings. Fifty percent (50%) of restaurant patrons say they are interested in trying new, unique soups; 58% say they are more likely to order soup as a combo-meal item than as a single item.

Datassential (www.datassential.com) reported soup offerings on full-service restaurant menus in 2013 and the change from four years prior as follows (percentage of restaurants):

	Menu Penetration	Change
• Tortilla:	11.9%	7%
• Bisque:	6.7%	12%
• Tomato soup:	5.5%	34%
• Lentil:	5.3%	8%
• Miso:	5.3%	8%
• Gumbo:	4.2%	2%
• Italian wedding:	2.5%	9%
• Tofu:	2.5%	19%
• Pea:	2.4%	20%
• Tom kai:	2.3%	10%
• Broccoli cheese:	1.8%	0%
• Mushroom:	1.7%	21%

“Soups boasting vegetables, tofu, and other ingredients with healthful connotations as well as those that are globally inspired are trending particularly well with consumers.”

Nation's Restaurant News, 2/10/14

59.6 Market Resources

Datassential, 156 N. Jefferson Street, Chicago, IL 60661. (312) 655-0622.
(www.datassential.com)

GuestMetrics Inc., 1602 Village Market Boulevard SE, Leesburg, VA 20175.
(703) 297-3400. (www.guestmetrics.com)

Technomic, Inc., 300 South Riverside Plaza, Suite 1200, Chicago, IL 60606.
(312) 876-0004. (www.technomic.com)

PART IX: DINING TRENDS & ANALYSES

BURGERS & SANDWICHES

60.1 Overview

According to The NPD Group (www.npd.com), Americans purchase more than 22 million sandwiches, burgers, and wraps each year. Sales of these items increased through the economic downturn.

According to *Sandwich Consumer Trend Report*, published by Technomic (www.technomic.com), 96% of consumers purchase sandwiches at least once a week; 59% say they eat at least three sandwiches a week.

60.2 Hamburgers

More burgers are sold at restaurants than any other food item, with fast-food restaurants serving the most. In all, 87% of all hamburgers sold come from fast-food restaurants. The 'Big Three' burger chains – McDonald's, Burger King, and Wendy's – account for nearly 75% of quick-service and fast-casual burger-chains sales in the U.S., according to Technomic.

A growing number of upscale, fast-casual burger players, dubbed "better burger" concepts, have penetrated the marketplace. Growing burger chains like BurgerFi, Shake Shack, and Umami Burger, for example, offer expanded choices through premium cuts of meat along with specialized toppings, sauces, and other add-ons.

The following is a comparison of burger sales at quick-service and full-service concepts (source: The NPD Group):

	Quick-Service	Full-Service
• Large cheeseburger:	43%	17%
• Regular cheeseburger:	20%	24%
• Bacon cheeseburger:	16%	25%
• Regular hamburger:	10%	15%
• Large hamburger:	9%	8%
• Miniature hamburger:	2%	11%

In spite of their popularity, burgers sales have declined for three consecutive years. Roughly 8.6 billion burgers were sold in 2013, compared to 9.3 billion in 2010.

According to Datassential (www.datassential.com), 44% of all restaurants – from quick-service to fine-dining – have some type of burger on their menu. Driven by the increasing popularity of upscale burgers, casual- and fine-dining restaurants across the U.S. have rolled out artisan burgers and unique pairings. Of all restaurants that offer

burgers, 32% are menued with cheddar, 30% with Swiss, and 25% with American cheese.

BurgerBusiness.com notes the following 14 burger concepts worth watching in 2014:

American Roadside Burgers

- The five-unit chain was acquired by Chanticleer Holdings, which operates Hooters restaurants outside the U.S. The new parent intends to expand ARB beyond its North Carolina and South Carolina locations throughout the Southeast.

B Spot

- Cleveland's Iron Chef Michael Symon opened the first B Spot there in 2009. Future plans include as many as three locations in Detroit, the Columbus (Ohio) area, and more.

Bad Daddy's Burger Bar

- Colorado's Good Times burger chain acquired a 48% stake in Charlotte-based Bad Daddy's; the two companies are expanding through franchising.

Beck's Prime

- With 12 locations in Houston, the company is now opening three locations in Dallas.

Burgatory

- The champion of the 2013 BurgerBusiness.com Burger Brackets is expanding throughout the Pittsburgh metropolitan area.

Burger Boss

- The first location opened in suburban Elmwood Park. Burger Boss is now opening on Chicago's North Side where quality burger bars abound.

CaliBurger

- The Chinese burger chain CaliBurger, which launched in Shanghai and Hong Kong, has plans for locations in Los Angeles and Washington, DC.

Flip Burger Boutique

- Founded in 2008 by Richard Blais, who appeared on Top Chef, Flip Burger Boutique operates three locations in Atlanta and one in Birmingham, Alabama. Charleston, Charlotte, Indianapolis, Louisville, Nashville, and Raleigh are possible future markets.

Flipdaddy's Burgers & Beers

- The Cincinnati concept expanded into Union, Kentucky, with its third opening. Each location has 24 to 35 craft beers on draft.

Freakin' Unbelievable Burgers

- The first location opened in 2012 in Flint, Michigan. The company has a franchising program that focuses on the Big Ten markets from Pennsylvania to Iowa and a couple of SEC markets like Tennessee and Kentucky.

Grub Burger Bar

- Launched in 2012 on the Texas A&M campus, the concept recently expanded operations to Houston and Dallas. A location is planned for Atlanta.

Liberty Burger

- The original opened in 2012 in Keller Springs, Texas, followed by a second in Lakewood, Texas.

Plan B Burger Bar

- The concept has quickly expanded to five locations in Connecticut and one in Massachusetts. Plans are to open locations in Atlanta, Boston, and Chicago.

Slater's 50/50

- The first location opened in Anaheim Hills, California, in 2009. There are now six California locations and plans are to take the concept nationwide.

60.3 Hot Dogs & Sausages

According to data provided by the National Hot Dog & Sausage Council (www.hot-dog.org), consumers spend more than \$4 billion purchasing 1.5 billion pounds of hot dogs each year.

During summer – Memorial Day to Labor Day – Americans consume seven billion hot dogs. On Independence Day alone, Americans consume an estimated 150 million hot dogs.

According to *The Size and Scope of the U.S. Hot Dog Market*, published by the National Hot Dog & Sausage Council, the summer months between Memorial Day and Labor Day continue to make up the 'hot dog season.' An average of 38% of the total number of hot dogs sold are during this time. Ten percent (10%) of annual retail sales of hot dogs occur during July, which is designated as National Hot Dog Month.

Hot dogs remain a favorite at baseball parks. The Hot Dog & Sausage Council estimated that 20.4 million hot dogs were consumed in major league stadiums during the 2013 season. More than 2.0 million hot dogs were sold at Shea Stadium, home of the New York Mets – the highest number among the 30 major league ball parks.

The following are the top hot dog consuming cities/region (source: National Hot Dog & Sausage Council):

1. Los Angeles, CA
2. New York, NY
3. Washington, DC/Baltimore, MD

4. Chicago, IL
5. Philadelphia, PA

Chicago is home to almost 2,000 privately owned hot dog restaurant and foodservice businesses – from street-side stands to dedicated neighborhood diners.

The Varsity (Atlanta, GA) sells an average of 17,000 hot dogs each day, the most of any restaurant in the world. On football game days at nearby Georgia Tech, the restaurant typically sells 50,000 hot dogs.

Gray's Papaya, with two locations in New York City, sells an average of 11,000 hot dogs daily, making it the most popular hot dog restaurant in the city.

Some areas are known for their regional favorites, including the following:

- Kansas City Dog: served with sauerkraut and melted Swiss cheese on a sesame seed bun
- Michigan Coney Island Dog (aka Michigan Coney): served with a meaty chili sauce and mustard and onion
- New York Style: served with steamed onions and a pale, deli-style yellow mustard
- Sonoran Dog: grilled, bacon-wrapped dog with pinto beans, grilled onions and green peppers, chopped fresh tomatoes, relish, tomatillo jalapeno salsa, mayonnaise, mustard, and shredded cheese
- Southern Style Hot Dog: topped with coleslaw
- West Virginia Dog: topped with coleslaw, chili, and mustard

60.4 Other Sandwiches

Technomic values the sandwich category at \$27.7 billion, with more than 54,000 restaurants in the category and more than 58 million sandwiches consumed.

Popular sandwich types include chicken and veggie sandwiches, along with wraps, tacos, tortillas, burritos, and crepes, with healthful and light sandwiches poised for growth among all sandwiches.

Grilled chicken and turkey/turkey club sandwiches, with 40% and 35%, respectively, of servings sold annually, are the most frequently consumed healthful sandwiches. Tuna salad (9%), chicken salad (8%), vegetable sandwiches (7%), and fish sandwiches (1%) follow.

According to Technomic, 57% of adults say they eat at least one deli sandwich every two months; 47% eat a sub sandwich in the same period.

60.5 Market Trends

While the focus of sandwiches and burgers typically centers around the meats, cheeses, condiments, and other toppings, more and more restaurateurs are improving the quality of their breads and buns. From whole grain to ancient grain, artisan to rustic, pretzel bun and more, sandwiches are evolving at every level of restaurant.

Jason's Deli has organic wheat wraps, Au Bon Pain offers ancient-grain ciabatta,

and Wendy's is nixing its recently introduced pretzel bun for the brioche.

Then there is the novel: the mash-up of a croissant and a donut which begets the cronut, the fried macaroni & cheese bun, and the ramen noodle bun.

60.6 Market Resources

National Hot Dog and Sausage Council, 1150 Connecticut Avenue NW, 12th Floor, Washington, DC 20036. (202) 587-4200. (www.hot-dog.org).

Technomic, Inc., 300 South Riverside Plaza, Suite 1200, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)

The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700. (www.npd.com)

CELEBRITY CHEFS

61.1 Cooking Shows On Television

Harris Interactive (www.harrisinteractive.com) found that 50% of adults watch TV shows about cooking occasionally or very often. By demographic, those who do so are as follows:

Gender

- Female: 54%
- Male: 46%

Age

- 18-to-33: 43%
- 34-to-45: 51%
- 46-to-64: 55%
- 65 and older: 49%

“In the Food Network era, the phenomenon of the celebrity chef has utterly transformed the restaurant industry and, in the process, changed the very nature of how we eat.”

Time

Exposure from television cooking shows has propelled some noted chefs to celebrity status.

61.2 Top-Earning Chefs

The top-earning celebrity chefs are as follows:

- Jamie Oliver: \$170 million
- Gordon Ramsay: \$ 80 million

- Wolfgang Puck: \$ 75 million
- Rachael Ray: \$ 60 million
- Emeril Lagasse: \$ 50 million
- Ina Garten: \$ 40 million
- Mario Batali: \$ 25 million
- Nobu Matsuhisa: \$ 20 million
- Tom Colicchio: \$ 20 million
- Bobby Flay: \$ 16 million
- Giada de Laurentiis: \$ 15 million
- Todd English: \$ 15 million
- Alain Ducasse: \$ 12 million

61.3 Chef Business Ventures

HFN rates the following as the top celebrity chefs and food personalities (past/present branding and media):

Bobby Flay

- Food Network's *Grill It!* and *Iron Chef America*
- Exclusive line of dinnerware, cutlery, and kitchen gadgets at Kohl's

Cat Cora

- Bravo's *Around The World In 80 Plates*; Food Network's *Iron Chef*
- Starfrit cookware sold by HSN, specialty shops, and online retailers

Curtis Stone

- TLC's *Take Home Chef*, Bravo's *Top Chef Masters*
- Kitchen Solutions cookware at Dillards, HSN, and Williams-Sonoma

Emeril Lagasse

- Host of shows on the Food Network, Cooking Channel, and Hallmark Channel
- Gorham dinnerware, T-Fal cookware, and small electronics

Guy Fieri

- Food Network's *Diners, Drive-Ins and Dives* and *Tailgate Warriors*
- Lifeline brand cookware, Ergo Chef cutlery, Fox Run barbecue tools, and restaurants

Marcela Valladolid

- Food Network's *Mexican Made Easy*
- Dinnerware, glassware, and accessories at Target

Martha Stewart

- Founder of Martha Stewart Living Omnimedia, which encompasses publishing, broadcasting, merchandising, and e-commerce
- Exclusive line of cookware, dinnerware, and kitchen gadgets at Macy's

Mario Batali

- ABC's *The Chew*, Food Network's *Iron Chef America*
- Cookware and kitchen tools at Crate and Barrel, Lenox.com, and Macy's

Rachel Ray

- Food Network's *30-Minute Meals* and *Every Day With Rachel Ray*
- Cookware and culinary at Bed Bath & Beyond, cooking.com, Kohl's and Target

Sandra Lee

- Food Network's *Sandra's Money-Saving Meals* and *Semi-Homemade Cooking*
- Exclusive line of cookware, dinnerware, and kitchen gadgets at Kmart and Sears

Wolfgang Puck

- Cookware sold at Bed Bath & Beyond, HSN, and other retailers
- Guest judge on *Top Chef*, *Hell's Kitchen*, *The Next Food Network Star*

The following are some other examples of hospitality and business ventures of these and other renowned chefs:

- In addition to co-ownership of restaurants in New York, Las Vegas, Los Angeles, and Singapore, chef Mario Batali has authored four cookbooks and is a spokesperson for Crocs footwear.
- Anthony Bourdain, formerly executive chef at Brasserie Les Halles in New York City, has authored several books, including best-selling *Kitchen Confidential: Adventures in the Culinary Underbelly*, and hosts *Parts Unknown* on CNN.
- David Chang, chef-owner of Momofuku Noodle Bar and several other restaurants in New York City, has co-authored a best-selling cookbook and has served as a guest judge on *Top Chef: All Stars*.
- Nobu Matsuhisa, famed sushi chef and business partners with Robert De Niro, has expanded beyond his celebrated restaurant concepts to include a boutique hotel with high-end sushi room service to his portfolio.
- Gordon Ramsay, owner of restaurants around the world, hosts the wildly popular *Hell's Kitchen* as well as *Master Chef*.
- Ming Tsai, chef-owner of Blue Ginger, has authored four cookbooks, stars on *Simply Ming*, which is in its tenth season on public television, and has licensed Blue Ginger Multi-Grain Brown Rice Chips to Kellogg's.

61.4 Chef-Inspired Restaurant Concepts

A few chefs have used their celebrity status to develop restaurant concepts across the country. Wolfgang Puck is credited with starting the concept of chef-branding.

The following are the largest chef-branded operations (U.S. operations only):

Alain Ducasse (www.alain-ducasse.com)

- Brands: Benoit New York, Mix in Las Vegas, Pinch American Grill

Emeril's Homebase (www.emerils.com)

- Brands: Burgers and More by Emeril, Delmonico Steakhouse, e2 emeril's eatery, e2Go, Emeril's Chophouse, Emeril's Delmonico, Emeril's Italian Table, Emeril's New Orleans, Emeril's New Orleans Fish House, Emeril's Orlando, Emeril's Tchoup Shop, Lagasse's Stadium, NOLA Restaurant, Table 10

Jean-Georges Management (www.jean-georges.com)

- Brands: ABC Cocina, ABC Kitchen, Jean-Georges, JoJo, Nougatine at Jean-Georges, Perry St, Simply Chicken, Terrace at Jean-Georges, The Inn at Pound Ridge, The Mark, The Mercer Kitchen

Mario Batali Restaurants (www.mariobatali.com)

- Brands: B&B Burger & Beer, B&B Ristorante, Babbo, Carnevinochi SPACCA, Mozza2Go, Osteria Mozza, OTTO Enoteca Pizzeria, Pizzeria Mozza, Pizzeria Mozza Newport Beach, Pizzeria Mozza San Diego, Tarry Lodge

Nobu Matsuhisa (www.noburestaurants.com)

- Matsuhisa Aspen, Matsuhisa Beverly Hills, Matsuhisa Vail, Nobu Dallas, Nobu Fifty Seven, Nobu Honolulu, Nobu Indian Wells, Nobu Las Vegas, Nobu Los Angeles, Nobu Malibu, Nobu Miami Beach, Nobu New York, Nobu Next Door, Nobu San Diego

Todd English Enterprises (www.toddenglish.com)

- Brands: Bluezoo, Bonfire, Ça Va Brasserie, Figs, Olives, Todd English Food Hall, Todd English P.U.B., Tuscany

Wolfgang Puck Fine Dining Group (www.wolfgangpuck.com)

- Brands: Chinois, CUT, Five Sixty by Wolfgang Puck, Gelson's, Postrio Bar & Grill, Puck's Tavern, red I seven, Spago, The Source by Wolfgang Puck, Trattoria del Lupo, The Source, Wolfgang Puck American Grille, Wolfgang Puck Bar & Grill, Wolfgang Puck Bistro, Wolfgang Puck Cafe, Wolfgang Puck Cucina, Wolfgang Puck Express, Wolfgang Puck Grille, Wolfgang Puck Pizzeria & Cucina, Wolfgang Puck Pizza|Bar, Wolfgang Puck Steak, WP24 by Wolfgang Puck

CHILDREN'S MEALS

62.1 The Kids LiveWell Initiative

The National Restaurant Association (www.restaurant.org) launched the Kids LiveWell Initiative in 2011. Nineteen restaurant chains participated in the program's first year, as follows: Au Bon Pain, Bonefish Grill, Burger King, Burgerville, Carrabba's Italian Grill, Chevys, Chili's, Corner Bakery Café, Cracker Barrel, Denny's, El Pollo Loco, Friendly's, IHOP, Joe's Crab Shack, Outback Steakhouse, Silver Diner, Sizzler, T-Bones Great American Eatery, and zpizza.

At the end of its first year, in 2012, the Kids LiveWell program boasted more than 100 participating brands – both chains and independent operators – with more than 25,000 locations throughout the U.S. More than 42,000 restaurants were participating in the program as of March 2014.

Participating restaurants commit to offering and promoting a variety of menu selections that meet criteria based on leading health organizations' scientific dietary recommendations, including the USDA Dietary Guidelines. Restaurants must offer a full kids' meal, including entrée, side, and beverage, totaling 600 calories or less. Meals must contain two or more servings of fruit, vegetables, whole grains, lean protein, and/or low-fat dairy, while restricting unhealthful fats, sugar, and sodium. Also, participating restaurants must provide and promote nutritional information.

62.2 Healthful Kids' Menus At QSRs

According to the National Restaurant Association, healthful options in kids' meals is the No. 4 food trend for 2014. It was the No. 3 trend in the quick-service restaurant (QSR) segment in 2012 and 2013; in 2011 it was the No. 1 trend. Though the interest in healthful meal options for children's fare has reportedly waned, numerous efforts continue toward improving the nutritional value of children's meals.

McDonald's launched the Happy Meal Choice program in 2004. More recently, McDonald's added to its kids' menu a grilled Snack Wrap option that comes with a Fruit n' Yogurt Parfait with granola and a 16.9-ounce bottle of water. The Happy Meal was revised in 2011 to include apple slices and fewer fries.

Subway's Fresh Fit® meals for kids include a low-fat sandwich, such sides as sliced apples and raisins, low-fat milk, yogurt, and juice options, and toy premiums promoting physical activities.

Burger King introduced Crown Meals for kids in 2011. There are breakfast,

hamburger, and chicken tender options, each accompanied by apple juice or fat-free milk and fresh apple slices.

Several fast-casual operators, including Tony Roma's, Olive Garden, and Uno's Pizzeria, also have revamped their menus.

The NPD Group (www.npd.com) found servings of kids' meals with toys were down 6% in 2011, from about 1.3 billion servings to 1.2 billion servings.

Though lures like toys may no longer help to boost sales of kids' meals, The NDP Group sees the renewed focus on menu offerings aimed at children continuing.

62.3 School Meals

In 2011, the U.S. Department of Agriculture published the revised dietary standards aimed at the approximately 32 million children who eat breakfasts and lunches served at schools. The guidelines are aimed at making meals more nutritious, including increasing the amounts of whole grains, fruits, and vegetables and limiting the amount of sodium, saturated fat, trans fat, and calories per meal.

The School Nutrition Association (www.schoolnutrition.org), a national, non-profit professional organization representing 55,000 school nutrition professionals across the country, provides the following assessment in *Back to School Trends Report 2013-2014*, based on a survey of cafeteria operators at K-12 schools:

- Cafeterias are serving fruits and vegetables in a variety of ways to appeal to students' diverse preferences. In addition to produce offered in the traditional serving line, over 55% of responding school districts have self-serve salad or produce bars.
- More schools are providing convenient grab-and-go options. Grab-and-go options were the most expanded for the school year, with 69% of schools adding such items. Nearly 64% of respondents offer pre-packaged salads, 87% offer whole fruit, and 67% offer packaged produce, like bags of baby carrots, grapes, and sliced apples that students can eat on the run or toss in their backpacks for later.
- Many districts are purchasing produce from local farmers – over 47.8% of respondents say they purchase as much locally-grown or locally-raised items as they had in the previous school year. Nearly one-third expect to purchase more for the 2014-2015 school year.
- All respondents are serving whole-grain rich items in their school cafeterias, with nearly every district offering whole-grain breads/rolls/buns. Breakfast items featuring whole grains are the most popular at 81% of schools. For lunch, this figure tops 73%. In all, over 80% of districts are offering whole-grain pastas, rice, and cereals, and 78% report serving whole-grain tortillas, pitas, or flatbreads.
- Schools have also taken steps to make kid favorites into healthy choices. In 42% of responding school districts, pizza is the most popular lunch entrée served, but over 92% of districts are serving pizza with a whole-grain rich crust. Districts also report serving student favorites that are low-sodium, low-fat, and reduced-sugar.
- Virtually all respondents (94%) use some method to encourage students to try these new menu items, with over 87% employing student taste testing/sampling methods.

Districts get students involved in the menu selection process by allowing them to taste test and provide feedback on potential new foods or recipes. Through taste tests, cafeterias gain valuable insight which helps them identify healthy choices that students are interested to eat. And when introducing new menu items, many cafeterias offer students free samples, giving students the chance to taste an unfamiliar food before they commit to selecting that item as part of their meal.

62.4 Market Resources

National Restaurant Association, 2055 L Street NW, Suite 700, Washington, DC 20036. (202) 331-5900. (www.restaurant.org)

School Nutrition Association, 120 Waterfront Street, Suite 300, National Harbor, MD 20745. (301) 686-3100. (www.schoolnutrition.org)

CUISINE

63.1 Regional Cuisine

Virtually every city and state in America has a dish that is its culinary signature.

The following are some cuisines and dishes for which states are noted (sources: *USA Today*, *Go*, and various local media sources):

- Alabama: Vegetable plate
- Alaska: King salmon
- Arizona: Chimichanga
- Arkansas: Catfish
- California: Fresh, seasonal organic vegetables
- Colorado: Lamb chops
- Connecticut: Whole clam bellies
- Delaware: French fries sprinkled with salt and malt vinegar
- Florida: Key lime pie, fresh seafood at local fish shacks, Floribbean cuisine
- Georgia: Peach cobbler
- Hawaii: Grilled mahi-mahi
- Idaho: Baked russet potato
- Illinois: Corn dogs
- Indiana: Perch
- Iowa: Grilled pork chops
- Kansas: Fried chicken
- Kentucky: Corn pudding
- Louisiana: Crawfish
- Maine: Lobster roll
- Maryland: Steamed blue crabs
- Massachusetts: New England clam chowder
- Michigan: Cherry pies
- Minnesota: Walleye
- Mississippi: Pecan pie
- Missouri: Prime rib
- Montana: Rainbow trout
- Nebraska: Strip steak
- Nevada: All-you-can-eat buffets, celebrity-chef steakhouses
- New Hampshire: New England boiled dinner
- New Jersey: Diner fare
- New Mexico: Enchiladas

- New York: Reuben sandwich
- North Carolina: Grilled quail
- North Dakota: Cinnamon rolls
- Ohio: German chocolate cake
- Oklahoma: Chicken-fried steak
- Oregon: Marionberry cobbler
- Pennsylvania: Shoo-fly pie
- Rhode Island: Jonnycakes
- South Carolina: Shrimp and grits
- South Dakota: Buffalo rib-eye steak
- Tennessee: Buttermilk biscuits
- Texas: Chili con carne; Tex-Mex cuisine
- Utah: Brownie chocolate sundae
- Vermont: Pancakes and maple syrup
- Virginia: Country hams
- Washington: Olympia oysters
- West Virginia: Ramps (wild onions)
- Wisconsin: Grilled bratwurst slathered with brown mustard
- Wyoming: Western breakfast

The following are some local specialties (sources: *Forbes*, *Sky Magazine*, *USA Today*, and various local media sources):

- Albuquerque, New Mexico: Blue corn enchiladas
- Atlanta, Georgia: Pot likker
- Boston, Massachusetts: Indian pudding, baked beans, surf & turf tacos, scrod
- Buffalo, New York: Buffalo wings
- Charleston, South Carolina: Creamy grits
- Chicago, Illinois: Italian beef, hot dogs, deep dish pizza
- Cincinnati, Ohio: Double-decker sandwich; Cincinnati chili
- Dallas, Texas: Barbeque brisket
- Kansas City, Missouri: Fried chicken dinner, barbecue
- Los Angeles, California: Fish tacos
- Louisville, Kentucky: Hot Brown
- Memphis, Tennessee: Pork sandwich
- Miami, Florida: Stone Crabs, Key Lime pie, Cuban sandwiches
- Milwaukee, Wisconsin: Frozen custard
- Mobile, Alabama: West Indies salad
- Nashville, Tennessee: Ham and red-eye gravy
- New Orleans, Louisiana: Oyster loaf, jambalaya, gumbo, crawfish
- New York, New York: Pastrami sandwich, pizza, bagels
- Philadelphia, Pennsylvania: Cheese steak sandwich
- Portland, Oregon: Oyster stew
- San Diego, California: Fish tacos
- San Francisco, California: Sourdough bread

- Seattle, Washington: Salmon
- Tampa, Florida: Cubano (Cuban sandwich)
- Tucson, Arizona: Chimichanga

The following are popular regional flavor profiles (source: *Nation's Restaurant News*):

Midwest

- American cheese
- Cherry
- Corned beef
- Italian beef
- Italian sausage
- Ranch

Northwest

- Anchovy
- Eggplant
- Ginger ale
- Iced coffee
- Lobster
- Mesclun
- Parmigiana
- Plum tomatoes
- Veal
- Ziti

South

- Catfish
- Crawfish
- Key lime pie
- Pecan
- Queso
- Sweet tea

West

- Avocado
- Burrito
- Cabbage
- Cilantro
- Green chile
- Latte
- Sourdough
- Tostada
- Zucchini

63.2 Ethnic Cuisine

According to Mintel (www.mintel.com), ethnic foods garner \$75 billion annually in the U.S. Italian, Mexican, Chinese, Pan-Asian, and Japanese cuisine were found by Mintel to be the most popular ethnic foods, with 66.6% of respondents to a Mintel survey saying authenticity was their top expectation when it comes to ethnic foods.

A recent survey by Harris Interactive (www.harrisinteractive.com) asked adults their favorite types of ethnic food. Responses were as follows:

- Italian: 28%
- Mexican: 24%
- Chinese: 22%
- Japanese: 7%
- Thai: 5%
- Indian: 3%
- Cajun: 2%
- Other: 8%

According to The NPD Group (www.npd.com), the following are the 10 fastest-growing ethnic cuisines on restaurant menus:

- Cuban
- Asian
- Shanghai
- Tuscan
- Mandarin
- Mediterranean
- Hong Kong
- Thai
- Japanese
- Italian

63.3 Market Resources

Mintel, 333 West Wacker Drive, Suite 1100, Chicago, IL 60606. (312) 932-0400.
(www.mintel.com)

The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700.
(www.npd.com)

CUSTOMER SERVICE

64.1 Ranking Customer Priorities

The National Household Survey, conducted by the National Restaurant Association (www.restaurant.org), asked adults the attributes most important when they are choosing a full-service restaurant. Responses were as follows:

- Good service: 97%
- Enjoyable atmosphere: 93%
- Good value: 93%
- Favorite items on the menu: 90%
- Healthy menu items: 76%
- Family- or child-friendly: 68%
- Locally sourced food: 64%
- Takeout or delivery options: 49%
- Food they haven't tried before: 48%
- Organic or environmentally friendly food: 43%

“Good service still tops the list of restaurant attributes.”

2013 Restaurant Industry Forecast
National Restaurant Association, 1/13

64.2 Customer Service Strategies

Jim Sullivan, CEO of Sullivision (www.sullivision.com), suggests the following as drivers of customer satisfaction at restaurants:

- Focus on ROG (return of guest), not ROI. Repeat business is the linchpin of profitability in any successful foodservice operation.
- Make your customers happier by hiring and developing great people. Compete first for talent, then customers.
- When customer service problems recur, look first at the system before you blame your people.

- Make certain that owners and managers set the right example. Companies do what the boss does. When managers walk past a problem, they've approved it.
 - Sync hiring, training, and marketing to support and exceed guest expectations. Servers must sell all that the kitchen can make and the kitchen must make all that the servers can sell.
 - Service goals should be budgeted every year along with sales goals.
 - Have a one-minute post-shift debrief meeting with every team member.
-

“In my opinion service is the key deliverable that distinguishes foodservice from retail operations. If you buy a laptop at an electronics store, you still have a laptop when you get home, no matter how you were treated by the employees. But when you go to a restaurant – other than leftovers – what do you have when you get home? Memories.”

Jim Sullivan, CEO
Sullivision
Nation's Restaurant News, 2/11/13

64.3 Team Service

Cross-training servers and pairing them up with co-workers has been shown to result in more effective coverage of tables.

“While the restaurant industry has long advocated the practice of having one server interact exclusively with designated customers, a growing number of casual-dining brands are turning to a team-service model in an effort to boost profitability and heighten the guest experience.”

Nation's Restaurant News

64.4 Top Restaurants For Service

Winners of Open Table's 2013 Diners' Choice Award for Best Service are presented in Section 98.3 of this handbook.

Zagat (www.zagat.com), a restaurant guidebook and online publisher, released its 2014 list of the best restaurants for service in December 2013. The list is presented in Section 117.5 of this handbook.

DINING & THE INTERNET

65.1 Consumer Use Of The Internet For Dining Activities

According to *2013 Restaurant Industry Forecast*, by the National Restaurant Association (www.restaurant.org), the following percentages of adults have used the Internet for various dining-related activities:

- Visit restaurant website: 59%
- View restaurant menu: 58%
- Information about a restaurant: 54%
- Place dine-in, carry-out or delivery order: 32%
- Make reservations: 27%

The following percentages of adults say they are likely to use these various sources to choose a restaurant:

- Internet search engine: 45%
- Promotion received by e-mail: 37%
- Online dining guide: 36%
- Consumer-driven review websites and online communities: 25%

According to *National Household Survey*, by the National Restaurant Association, the following is the proportion of adults who have used the Internet for select restaurant-related activities:

	All Adults	18-34	35-44	45-54	55-64	65+
• Visit a restaurant's website:	60%	76%	73%	57%	51%	29%
• View a restaurant's menu:	59%	75%	71%	55%	50%	29%
• Find out information about a restaurant they haven't been to before:	57%	74%	65%	56%	46%	29%
• Place an order for carry-out or delivery:	42%	63%	51%	34%	27%	20%
• Search for nutritional info about restaurant food:	34%	45%	45%	28%	27%	15%
• Use a smartphone app to find a restaurant, place order or make a reservation:	34%	55%	44%	23%	20%	11%
• Make reservations:	33%	44%	38%	28%	25%	20%

• Post or read reviews about restaurants on consumer-driven site such as Yelp:	27%	40%	37%	25%	15%	9%
• View restaurant fan sites and pages on Facebook, Pinterest or YouTube:	23%	32%	33%	17%	17%	7%
• Purchase merchandise from a restaurant's website:	14%	22%	16%	10%	8%	7%
• Follow restaurant on Twitter:	5%	7%	7%	2%	4%	3%

	Frequent Full-service	Frequent Quick-service	Frequent Off-Premises Dinner
• Visit a restaurant's website:	66%	65%	70%
• View a restaurant's menu:	65%	64%	67%
• Find out information about a restaurant they haven't been to before:	64%	65%	66%
• Place an order for carry-out or delivery:	50%	50%	54%
• Search for nutritional info about restaurant food:	40%	39%	34%
• Use a smartphone app to find a restaurant, place order or make a reservation:	50%	45%	48%
• Make reservations:	40%	33%	39%
• Post or read reviews about restaurants on consumer-driven site such as Yelp:	40%	33%	36%
• View restaurant fan sites and pages on Facebook, Pinterest or YouTube:	26%	32%	30%
• Purchase merchandise from a restaurant's website:	18%	20%	24%
• Follow restaurant on Twitter:	8%	6%	8%

By generation, the following are restaurant activities of U.S. Internet users (source: Technomic [www.technomic.com]):

	Millennials	Generation X	Baby Boomers
• Look at restaurant menus online via mobile phone/smartphone:	32%	17%	8%
• Follow restaurants via social media:	23%	15%	6%
• Check in at restaurant via an app:	19%	8%	4%

Among all age groups, this study found looking up menus to be the most popular restaurant-related activity.

Mobile Fast Food Marketing: How QSRs and Fast Casuals Are Getting Quicker and Faster, a report by eMarketer (www.emarketer.com), found that fast-food and fast-casual patrons, the most frequent users of mobile Internet, are increasingly making their dining decisions on the move. Using store locators, menu finders, mobile coupons, and ordering apps, this cohort engages heavily with restaurants via the Internet.

Mobile Path-to-Purchase Restaurants, a report by xAd (www.xad.com) and Telmetrics (www.telmetrics.com), found the time frame from searching for restaurant information to purchase among smartphone and tablet users as follows:

	Smartphone	Tablet
• Immediately:	30%	15%
• Within hour:	34%	29%
• Within day:	25%	40%
• Within month:	7%	15%
• Wasn't looking to book anything:	3%	1%

The study also found 64% of mobile searchers purchase their meal within an hour of searching.

65.2 Restaurant Websites

According to the National Restaurant Association, the following percentages of restaurant operators have a website:

- Fine-dining: 97%
- Casual-dining: 82%
- Quick-service: 81%
- Family-dining: 76%

The percentages of restaurant websites with various features are as follows:

	Fine-Dining	Casual-Dining	Family-Dining	Quick-Service
• Menu:	99%	98%	95%	93%
• E-mail option:	91%	86%	76%	55%
• Promotions/daily specials:	61%	71%	59%	52%
• Reservations:	65%	32%	23%	n/a
• Merchandise:	22%	37%	29%	25%
• Job listings:	19%	25%	19%	54%
• Packaged food items:	11%	15%	23%	12%
• Takeout/delivery ordering:	13%	13%	18%	34%
• Menu nutritional information:	11%	7%	17%	65%

65.3 Online Reservations

There are several online reservations services operating throughout the United States. The largest among these is OpenTable.com, which provides reservation services for more than 29,000 restaurants across the U.S. Restaurants using this service pay a \$1,200 installation fee and a fee of \$200 monthly, plus a \$1 fee for each reservation. Diners who make reservations do not pay a fee.

65.4 Online Reviews

According to the National Restaurant Association, 35% of U.S. adults have used online reviews to research a restaurant they had not yet visited.

The two top national sites for restaurant reviews are Citysearch.com and Yelp.com. According to *The New York Times*, both have about four million written reviews and 15 million visitors a month. Other popular review destinations include Chowhound.com, Dinesite.com, IgoUgo, Insider Pages, OpenTable, local.Yahoo.com, and Zagat.com.

The rising influence of online restaurant reviews has not diminished the popularity of traditional media reviews. *Zagat*, for example, sells 5.5 million of its print guides each year, according to *The New York Times*.

65.5 Social Networking

When asked about their activities on Facebook and Twitter, responses were as follows (source *Nation's Restaurant News*):

	Yes	No
• Do you currently follow any restaurants on Facebook?	16%	84%
• Do you currently follow any restaurants on Twitter?	4%	96%

When asked about their social networking activities, restaurant operators responded as follows:

	Yes	No
• Is your restaurant on Facebook?	25%	75%
• Is your restaurant currently on Twitter?	38%	62%

When asked in a survey by the National Restaurant Association about their future social media activities, restaurant operators responded about the tools they expect to use in the next two years, as follows:

	Fine-Dining	Casual-Dining	Family-Dining	Quick-Service
• Facebook:	84%	80%	74%	80%
• Online review sites (Yelp, etc.):	70%	62%	61%	56%
• Twitter:	63%	60%	51%	69%
• Restaurant blog:	62%	44%	45%	51%
• Phone apps like Urban Spoon:	54%	47%	37%	47%
• YouTube/other video sharing sites:	45%	40%	44%	50%
• Text messaging:	36%	46%	38%	64%
• Flickr/other photo-sharing sites:	42%	32%	39%	41%

65.6 Online Ordering

According to a survey by Prof. Sheryl E. Kimes at the School of Hotel Administration at Cornell University, 48% of adults have ordered meals online, either through websites, text messaging, or mobile apps. The percentages of those who have done so are as follows:

Gender

- Female: 52%
- Male: 45%

Age

- 18-to-24: 70%
- 25-to-34: 78%
- 35-to-49: 55%
- 50-to-64: 33%
- 65 and older: 21%

Locale

- Urban: 60%
- Suburban: 49%
- Small town: 36%
- Rural: 41%

Cornell University researchers found that 27% of restaurants offering takeout, delivery, or catered meals support online ordering. Among those offering the option, 89% said their systems led to incremental business increases, improved service, or both.

65.7 Market Resources

eMarketer, 11 Times Square, New York, NY 10036. (212) 763-6010.
(www.emarketer.com)

National Restaurant Association, 2055 L Street NW, Suite 700, Washington, DC 20036.
(202) 331-5900. (www.restaurant.org)

Technomic, Inc., 300 South Riverside Plaza, Suite 1200, Chicago, IL 60606.
(312) 876-0004. (www.technomic.com)

DINING WHILE TRAVELING

66.1 Traveler Dining

The National Restaurant Association (www.restaurant.org) reported that travelers and tourists represent an average of 29% of sales for fine-dining operators, approximately 25% of sales for family-dining and casual-dining operators, 19% of sales for quick-service operators, and 15% of sales for fast-casual operators.

According to a survey by Experian Marketing Services (www.experian.com), 18% of adults say that they “try to eat gourmet food whenever they can.” Travel provides the opportunity for those who enjoy gourmet dining to experience new cuisine.

According to *Portrait of Affluent Travelers*, a report by Ypartnership (www.mmgyglobal.com), 85% of luxury travelers want dining in new and different restaurants as part of their travel experience. This ranked highest among all travel activities among the affluent, ahead of shopping, gambling, cultural activities, museums, and spas.

66.2 Culinary Destinations

According to the U.S. Travel Association (USTA, www.ustravel.org), the top destinations for food-related travel are as follows:

- California
- Florida
- New York
- Texas
- North Carolina
- Georgia

The top destinations for wine-related travel are as follows:

- California
- New York
- Missouri
- North Carolina
- Oregon
- Pennsylvania

66.3 Sampling Tours

Combining culinary interests with walking tours, sampling tours have become an increasingly popular tourist activity in New Orleans, Seattle, and New York, among other cities.

In the city where Creole cuisine – proclaimed to be the country's only true regional cuisine – originated, New Orleans Culinary History Tours (www.noculinarytours.com) offers daily walking tours. Stops on the tour include several historic restaurants, including the two oldest in the city: Antoine's and Tujague's, established in 1840 and 1856, respectively.

The concept has also caught on in Seattle. Savor Seattle Tours (www.savorseattletours.com) offers walking tours that stop at select restaurants and farmers' market booths for demonstrations, informative talks, and tastings at the famed Pike Place Market. Seattle Food Tours (www.seattlefoodtours.com) offers cultural and food tours of both Pike Place Market and the Belltown neighborhood.

In South Florida, Miami Culinary Tours (www.miamiculinarytours.com) offers the Cuba Bonita Tour, with visits to Little Havana and Key Biscayne for a variety of classic Cuban dishes and drinks.

In Baltimore, Charm City Food Tours (www.charmcityfoodtours.com) hosts culinary tours of four neighborhoods: Federal Hill, Fells Point, Little Italy/Jonestown, and Mount Vernon.

Walking tours focusing on New York City's diverse ethnic and local cuisine have become popular. The following are three of the more popular tours:

- Savory Sojourns (www.savorysojourns.com) hosts tours throughout Manhattan that include visits to the city's myriad specialty food shops and indoor markets. The group also takes visitors on ethnic food tours through such neighborhoods as Chinatown, Little Italy, and Atlantic Avenue, also known as 'Little Arabia.'
- New York Chocolate Tours (www.sweetwalks.com), hosted by Carmen Botez, editor of an online magazine, charges visitors \$70 for a tasting tour of the city's high-end sweets shops.
- Foods of New York Tours (www.foodsofny.com) offers tours of shops and restaurants in Chelsea Market, Chinatown, and Greenwich Village. According to *The News & Observer*, annual ticket sales total more than 20,000 and are increasing at about 30% per year.

66.4 Culinary Arts Programs

Besides their curricula for students seeking careers in the field, several U.S. cooking schools have programs specially designed for tourists as well as locals wanting to sharpen their culinary skills. One such is Johnson & Wales University (www.jwu.edu), with its Chefs Choice® classes at its Providence, Rhode Island; North Miami, Florida; Denver, Colorado; and Charlotte, North Carolina, campuses.

Harrah's Resort in Atlantic City, New Jersey, offers visitors the opportunity to fine-tune cooking skills at The Viking Cooking School. Students prepare gourmet dishes

during the classes, which are offered for 90 minutes or three hours.

The Creative Cooking School (www.creativecookingschool.com) in Las Vegas, Nevada, offers four-day classes that teach the techniques of sautéing, stir-frying, roasting, grilling, and pan-frying. Participants learn how to prepare romantic dinners, spruce-up recipe staples, and create dessert treats like chocolate decadence soufflé.

The Culinary Institute of America (www.ciachef.edu) offers two- to five-day sessions at its Hyde Park, New York, campus. The basic program covers stocks, sauces, and sautéing; the pastry course tackles delicacies from buttercreams to crème anglaise; and baking courses focus on recipes from sourdough starters to scones. At the school's campus in St. Helena, California, novices can take a variety of food and wine courses.

The following are other prominent cooking schools, all of which offer both chef demonstrations and hands-on classes:

- New Orleans Cooking Experience (New Orleans, LA; www.thenoce.com)
- Relish Culinary Adventure (Healdsburg, CA; www.relishculinary.com)
- The French Pastry School (Chicago, IL; www.frenchpastryschool.com)
- The Institute of Culinary Education (New York, NY; www.ice.edu)

Select cruise lines also offer culinary activities. Crystal Cruises, for example, started its guest chef program on world cruises in the early 1990s and has since expanded to more than a dozen itineraries. In addition to the sure-fire appeal of the cooking demonstrations and tastings by celebrated chefs, the line sees it as an educational tool for its own chefs. Adding a winemaker or sommelier boosts wine sales.

66.5 Winery Tours

Sonoma and Napa Valley, California, particularly the wineries, are primary tourist destinations, garnering five million visitors annually. Approximately an hour north of San Francisco, the heart of California's \$35 billion wine industry offers many tour options. Along with the opportunity to learn about the art of winemaking, wineries in the region offer breathtaking views, outdoor music, and other attractions. The following is a sampling:

- A tour of Gloria Ferrer winery (www.gloriaferrer.com) takes visitors deep into the caves carved out of the hillside and educates them on the process of sparkling winemaking. Each summer the winery hosts its Catalan Festival – a two-day celebration honoring the owners' Spanish roots.
- Gundlach Bundschu (www.gunbun.com) has transformed the winery experience into much more. In the spring and summer the winery hosts a myriad of activities that include a Shakespeare festival, movies under the stars, and classical music concerts.
- St. Supery Vineyards and Winery (www.stsupery.com) offers a one-day Harvest Adventure. Groups of up to 12 pick grapes, stomp them with their feet, and taste juices as they ferment. A blending seminar concludes the experience.
- Viansa Winery & Italian Marketplace (www.viansa.com) includes a 90-acre waterfowl preserve. In the summer months the winery hosts barbecues and live music.

Winery-themed tourism is not exclusive to California; all 50 states have at least one

winery. Most wineries have gift shops and offer wine tasting for visitors. A few are destinations for business meetings and leisure tourists. Château Élan Winery & Resort (www.chateauelanatlanta.com), 40 minutes north of Atlanta, for example, has a conference center, spa, two championship golf courses, classic French fine-dining, and an Irish pub in addition to winery tours.

In New York state, the Finger Lakes and Long Island areas are prominent viticultural regions. The Hudson Valley, 90 miles north of New York City, is home to Benmarl Winery, in Marlboro, the country's oldest commercial winery and the oldest continuously farmed vineyard, dating to 1772.

Prohibition nearly wiped out Texas's wine industry, but it re-emerged in the 1970s and now offers 163 wineries in four regions. The prime sectors are the Texas Hill Country American Viticultural Area and, within that, the 110-square-mile American Viticultural Area of Fredericksburg. About 30 wineries are located within them, as are many of the state's best BBQ restaurants.

Fifty-six wineries are spread across Michigan along four wine trails, but most of the best grapes are grown near the eastern shore of Lake Michigan and its bays. Top wineries are positioning themselves as small but key players in the Riesling renaissance that is taking hold across the country, and nearly one million visitors sampled the offerings in 2013. The most popular wine region, because of its prime setting along Lake Michigan, is the Leelanau Peninsula, home to about 20 wineries, 16 of which have public tasting rooms.

66.6 American Whiskey Trail

The Distilled Spirits Council of the United States has developed the American Whiskey Trail (www.discus.org/trail) in conjunction with several distillers and historic sites in Virginia, Kentucky, and Tennessee. The trail is a heritage route tracing the history of spirits in America, from the colonial era, where whiskey had an important economic and social function in the fabric of the community, to the Whiskey Rebellion, through prohibition, and into modern times.

Participating distillers include Buffalo Trace (Franklin County, KY), George Dickel (Tullahoma, TN), Jack Daniel's (Lynchburg, TN), Jim Beam Distillery (Clermont, KY), Maker's Mark (Loretto, KY), Wild Turkey (Lawrenceburg, KY), and Woodford Reserve (Versailles, KY). The gateway to the American Whiskey Trail is George Washington's Distillery at Historic Mount Vernon.

66.7 Market Resources

Experian Marketing Services, 1271 Avenue of the Americas, 45th Floor, New York, NY 10020. (866) 256-4468. (www.experian.com/marketing-services/marketing-services.html)

National Restaurant Association, 2055 L Street NW, Suite 700, Washington, DC 20036.
(202) 331-5900. (www.restaurant.org)

U.S. Travel Association, 1100 New York Avenue NW, Suite 450, Washington, DC 20005.
(202) 408-8422. (www.ustravel.org)

DINING WITH ENTERTAINMENT

67.1 Overview

Combining entertainment with dining is not new, yet the popularity of jazz clubs and other types of restaurants that offer music and entertainment with dining is as strong as ever. Dinner theaters and comedy clubs also remain popular 'eatertainment' destinations.

“As the industry continues to get more competitive, entertainment really does become a differentiating component.”

Hudson Riehle, Sr. V.P. Research
National Restaurant Association

The restaurant and entertainment sectors were among the business segments hardest hit during the economic downturn. Consumers have experienced 'frugality fatigue,' as Ron Paul, President of Technomic (www.technomic.com), calls the phenomena, but many have resumed their spending at restaurants that offer fun along with an enjoyable dining experience.

67.2 Live Music and Dining

Restaurants featuring all varieties of live music are popular across the country. Two chains operate music venues with restaurants, as follows:

- House of Blues (www.hob.com) is a home for live music and southern-inspired cuisine in an environment celebrating the African-American cultural contributions of blues music and folk art. The first location opened in 1992. There are now clubs/restaurants in Anaheim, Atlantic City, Boston, Chicago, Cleveland, Dallas, Houston, Las Vegas, Los Angeles, Myrtle Beach, New Orleans, Orlando, and San Diego.
- Hard Rock Live (www.hardrock.com) has locations in Biloxi, Hollywood (Florida), Las Vegas, Northfield Park (Ohio), and Orlando.

The following are some of the top jazz clubs across the U.S. noted for their cuisine:

- Baker's Keyboard Lounge (Detroit, MI; <http://theofficialbakerskeyboardlounge.com>)
- Birdland (New York, NY; www.birdlandjazz.com)
- Blue Note (New York, NY; www.bluenotejazz.com)
- Blues Alley (Washington, DC; www.bluesalley.com)
- Catalina Bar & Grill (Los Angeles, CA; www.catalinajazzclub.com)
- Dakota Jazz Club & Restaurant (Saint Paul, MN; www.dakotacooks.com)
- Dimitriou's Jazz Alley (Seattle, WA; www.jazzalley.com)
- Iridium (New York, NY; www.iridiumjazzclub.com)
- Snug Harbor Jazz Bistro (New Orleans, LA; www.snugjazz.com)
- Tula's (Seattle, WA; www.tulas.com)
- Yoshi's at Jack London Square (Oakland and San Francisco, CA; www.yoshis.com)

67.3 Theme Restaurants

Theme restaurants, primarily Hard Rock Cafe and Planet Hollywood, were the rage of the early 1990s. As with most hot trends, interest shifted and the theme restaurant segment began to fade. Theme restaurants that have survived have done so by finding their own niche in the market and by placing a priority on their food quality.

Both Hard Rock Cafe and Planet Hollywood have survived by downsizing, changing with the times, and capitalizing on international appeal. And both have used their brand reputation to expand into the casino market.

The tropical jungle-themed Rainforest Cafe, developed by Steve Schussler and launched in 1994, was sold to Landry's Restaurants in 2000. Today, Landry's operates 23 Rainforest Cafes in the United States and five abroad.

Mr. Schussler also developed the vision for the dinosaur-themed T-Rex, in Kansas City, and Yak & Yeti, an Asian-theme concept which opened in 2008 in Disney's Animal Kingdom. Both T-Rex and Yak & Yeti are also owned by Landry's.

One of the most successful theme restaurant concepts is Chuck E. Cheese's (www.chuckecheese.com), which launched in 1977. The child-friendly pizza chain has 535 locations.

The following are other theme restaurants operating across the United States:

- At Harley-Davidson Cafe (Las Vegas, NV; www.harley-davidsoncafe.com), a giant three-dimensional sculpture of a Harley-Davidson motorcycle is integrated into the structure to appear as if it is bursting out of the northwest corner of the building. On the Las Vegas Strip, where land values are estimated at \$13 million an acre, the Harley-Davidson Cafe is the last remaining freestanding restaurant; all others are affiliated with hotel casinos.
- NASCAR Sports Grill (Hampton, VA and Orlando, FL; www.nascarsportsgrill.com), a gathering place for racing fans, combines memorabilia, a 37-foot media wall with plasma screens and audio, and dining.
- Country music star Toby Keith has three branded Toby Keith's I Love This Bar & Grill (www.tobykeithsbar.com) restaurants, which display the singer's music

memorabilia and host concerts. Locations are in Oklahoma City, Thackerville, and Tulsa, Oklahoma.

67.4 Experiential Restaurants

Some restaurants provide an entertainment experience with the meal. The following are notable examples:

- Dave & Buster's (www.daveandbusters.com) combines dining with the largest chain of amusement arcades in the country. The concept was launched in the late 1970s in Little Rock, Arkansas, when two side-by-side establishments, Slick Willy's World of Entertainment and Buster's Bar & Grill, combined operations. There are now 68 locations.
- Dinner in the Sky (www.dinnerinthesky.com) hoists up to 22 guests on a platform 18 stories above the ground for dinner. The experience is offered in Las Vegas, New York City, and Seminole Casino Coconut Creek (Florida), plus several cities in 31 countries. The concept has been expanded to include marriage in the sky, lounge in the sky, and showbiz in the sky.
- The decor of Jekyll & Hyde Pub (New York City, www.jekyllpub.com) includes gargoyles and coffins. The ghoulish entertainment includes live skits, animatronics, and interactive puppets. Also offered by parent company Jekyll & Hyde Entertainment Group is Jekyll & Hyde of Greenwich Village, Shipwreck Tavern, The Slaughtered Lamb Pub, an adventure park and a "scream" park.
- Medieval Times (www.medievaltimes.com) is a nine-unit chain with restaurants set inside a faux 11th century castle. Guests experience all of the feasting, pageantry, tournament games, and exciting sword fights that characterized the best of life a millennia ago. Locations are in Atlanta, Georgia; Buena Park, California; Dallas Texas; Chicago, Illinois; Hanover, Maryland; Kissimmee, Florida; Lyndhurst, New Jersey; Myrtle Beach, South Carolina; and Toronto, Ontario.
- Dining at Opaque - Dining in the Dark (West Hollywood, CA, www.darkdining.com) is precisely what the name implies. Customers are led into a pitch-black dining room where relying on their other four senses during the experience, they dine on a three-course meal. The waiters are legally blind. Launched in 2005 as a Saturday-only concept, dining expanded to include Friday evenings. Locations have opened in San Diego, San Francisco, Dallas, and New York.

67.5 Mystery Dinner Theaters

There are approximately 200 mystery dinner theaters across the U.S.; the Orlando area alone has six. The following are some of the more prominent mystery dinner theaters:

- Agatha's A Taste of Mystery (Atlanta, GA; www.agathas.com)
- Bistro Romano Mystery Theatre (Philadelphia, PA; www.bistroromano.com)
- Haunted Dinner Theater (Williamsburg, VA; www.haunteddinnertheater.com)

- Murder by Chocolate (Houston, TX; www.murderbychocolate.net)
- Murder Mystery Train (Lansing, MI and Toledo, OH; www.murdermysterytrain.com)
- Mystery Cafe (Boston, MA; www.mysterycafe.com)
- Seminole Dinner Mystery Train (Ft. Myers, FL; www.semigulf.com)
- Sleuths Mystery Dinner Show (Orlando, FL; www.sleuths.com)
- The Dinner Detective (31 locations; www.thedinnerdetective.com)

67.6 Dinner and a Movie

Attendance at movie cinemas has been on the decline since 2002, largely because of increased competition from digital downloads, video on demand, and DVD rent-by-mail; combined with increasingly theater-like home-entertainment technology. Hoping to lure moviegoers back to the cinema, several new ventures put a new spin on the 'dinner and a movie' concept, offering a combination of reserved seating, alcoholic beverage service, made-to-order dinners, and theaters that include leather seating, all while projecting the latest films via state-of-the art digital projection systems. The following are a few of the operations:

- Alamo Drafthouse Cinema (www.drafthouse.com) has expanded to 14 units.
- AMC Theatres, the second largest cinema chain in the U.S., operates Fork & Screen (www.amctheatres.com/buckhead/) in Atlanta.
- Cinebarre (www.cinebarre.com), a unit of Regal Cinemas, which opened its first location in 2007, has locations in Colorado, North Carolina, Oregon, South Carolina, and Washington.
- Cobb Theatres/Cine Bistro (www.cobb Cinebistro.com) has seven locations, in Colorado, Florida, Georgia, and Virginia.
- iPic Theaters, (www.ipictheaters.com) has locations in Arizona, California, Florida, Illinois, Maryland, Texas, Washington, and Wisconsin.
- Movie Tavern (www.movietavern.com) opened its first location in 2007 and has 16 locations, in Colorado, Georgia, Kentucky, Ohio, Pennsylvania, Texas, and Virginia.
- Muvico (www.muvico.com) locations offer seating connected to its Premier Bistro & Bars.
- Studio Movie Grill (www.studiomoviegrill.com) has 16 locations, in Arizona, Georgia, Illinois, North Carolina, Ohio, and Texas.

67.7 Speakeasies

While today's restaurants and bars work hard to maintain visibility, a handful strive to keep their locations secret, reminiscent of the speakeasies of the 20's and 30's throughout Prohibition. The following are among those with hidden doorways and coded access:

- Alchemy (www.alchemymidtown.com), tucked into an alleyway in the Midtown neighborhood in Tallahassee, Florida, allows patrons entrance only with a reservation and a secret password. Cocktails are crafted using ingredients reflective

of the speakeasy era.

- In Tampa, a password is needed to gain entrance to Ciro's Speakeasy (www.cirostampa.com). Staff dress the part, with ladies wearing flapper-style cocktail dresses and gents donning shirts and ties with rolled-up sleeves and suspenders.
- In Atlanta, Prohibition (www.prohibitionatl.com) is a swanky club with the feel of a 1920s underground speakeasy. Guests ask around at a nearby bar for a secret phone number and step into an antique phone booth to call for entry.
- In New York City, guests enter PDT [Please Don't Tell] (www.pdtnyc.com) through a phone booth in Crif Dogs, a hot dog shop.
- In Alexandria, Virginia, the entrance to PX (www.eamonnsdublinchipper.com) is marked only by a pirate flag and blue light. Reservations may be made only online. Upon arrival, guests knock, a small window in the door opens, and their reservations are confirmed before entry.
- At Safe House (www.safe-house.com), a spy-themed restaurant and bar in Milwaukee, guests must recite a password for entry. The staff is really into the espionage mission, holding James Bond screenings and talking in spy lingo. International Exports Ltd., on North Front Street, is in fact a craftily contrived 'front' for the Safe House.

67.8 Novel Restaurants

The following are some other unique concepts in restaurants:

- The "Breastaurant" concept has grown beyond just Hooters (www.hooters.com) and now includes Bikinis Sports Bar & Grill (www.bikinissportsbarandgrill.com), Brickhouse Tavern + Tap (www.brickhousetavernandtap.com), The Tilted Kilt (www.tiltedkilt.com), Twin Peaks (www.twinpeaksrestaurant.com), and more. This niche segment garners roughly \$2 billion annually.
- Firehouse Grill (Evanston, Illinois, www.firehousegrill.net) maintains much of the original interior of the old fire station it replaced.
- Forbes Island (www.forbesisland.com) is a floating restaurant built on a barge in San Francisco Bay. Patrons access the restaurant by boarding a boat from Pier 39 on Fisherman's Wharf. It took 10 years to obtain permits for the project, which includes the only privately built lighthouse in the United States.
- Garage (Seattle, www.garagebilliards.com) is located in a cavernous old auto repair shop. The restaurant includes a billiards hall and bowling alley.
- Hangar One Steakhouse (www.hangaronesteakhouse.com) is perfect for Wichita, which is dubbed the "Air Capital of the World." Servers dressed like flight attendants serve aviation-themed menu items in a makeshift airplane hangar.
- Heart Attack Grill (Dallas, Houston, and Las Vegas; www.heartattackgrill.com) takes pride in its unhealthy menu with such offerings as a four-patty Quadruple Bypass Burger®, French fries deep fried in pure lard, and a milk shake with the "world's highest butterfat content." Meals are served by waitresses dressed as nurses. Customers weighing over 350 pounds eat free.

- Locanda Vini e Olii (Brooklyn, New York; www.locandavinieolii.com) is a former drug store that retained much of the authentic decor, including the service counter, old cabinets, and medicine bottles.
- Ninjas do the serving at the Japanese concept restaurant Ninja New York (www.ninjanewyork.com).
- Attached to Best Western's Space Age Lodge, Outer Limits Restaurant (Gila Bend, Arizona; www.bestwesternspaceagelodge.com/html/Restaurant.htm) features a neon-lit rooftop UFO. Inside there is a floor-to-ceiling outer-space theme, along with a menu of American and Mexican fare.
- The decor at Space Aliens Grill & Bar (Bismark, North Dakota; www.spacealiens.com) features a 30-foot-high domed ceiling that displays a view of outer space. The dining room, bar, and arcade showcase alien sculptures along with an extensive menu.
- Evocative of being backstage at a concert, with picnic tables, concert lighting, large-screen TVs, and projection screens with a 360-degree speaker system, Rock & Brews (www.rockandbrews.com), co-founded by Gene Simmons of the rock band KISS, opened its first location in Los Angeles in 2011.
- Located below the Fairmont Hotel in San Francisco, the circa-1945 tropical lounge the Tonga Room (www.tongaroom.com) is a remarkably intact vision of midcentury Tiki culture. The Island Groove Band performs on the lagoon on a moving Gilligan's Island-esque raft platform, and every half hour there's an indoor thundershower. The Tonga room serves Pacific Rim cuisine and tropical cocktails served in tiki vessels.
- The Cave (www.thecaverestaurantandresort.com), in Richland, Missouri, is the nation's only restaurant located in an actual cave. The space began as a natural cave that served as a dance hall in the 1920s.
- Supperclub (www.supperclub.com) is a multisensory experience incorporating unusual food, music, dancing, and experimental and avant-garde live performances (supperclub performers are often culled from art schools). With U.S. locations in San Francisco and Los Angeles, the restaurant offers a four-course internationally inspired meal from chef Nelson German served to diners who lounge fashionably on white beds.
- Eat. Drink. Do Laundry. Located in College Station, Texas, patrons at Harvey Washbangers (www.washbangers.com) can enjoy free wi-fi, local microbrews, and a bar & grill menu along with the option of doing their laundry or dropping off clothes for dry cleaning.
- Housed in a Chateausque mansion dating to 1908, the Magic Castle restaurant (www.magiccastle.com) is a private club in Hollywood, California, for members of the Academy for Magic Arts and their guests, offering a menu inspired by the Victorian era.
- Opened in New York in 1993, Lucky Cheng's (www.luckychengsrestaurant.com), with a location in Las Vegas, offers guests pan-Asian cuisine with a drag show.

DOG-FRIENDLY RESTAURANTS

68.1 Overview

The American Pet Products Association (www.americanpetproducts.org) estimates that approximately 45.6 million U.S. households (40% of all households) own a dog.

For most dog owners, their pets are valued as companions and friends. In a Harris Poll (www.harrisinteractive.com), 92% of dog-owners said they consider their pet to be a member of the family.

A survey by GfK (www.gfk.com) found 43% of dog owners feed their pet 'human food,' and 42% have taken the dog along on a vacation.

“It wasn’t so very long ago that the phrase ‘a dog’s life’ meant sleeping outside, enduring the elements, living with aches, and sitting by the dinner table waiting for a few scraps to land on the floor. Today’s dog has it much better. Their menu reflects every fad in human food – from locally sourced organic meat and vegan snacks to gourmet meals bolstered by, say, glucosamine to ward off stiff joints.”

Bloomberg Businessweek

68.2 Dog-friendly Restaurants

Local health codes generally mandate that pets be restricted from enclosed restaurants, but many allow dogs in open-air areas. Where permitted, some restaurants with outdoor seating will allow people dining outside to have their pets.

Taking one’s dog to restaurants and other public places isn’t unusual in

European countries and in the trendy boutiques and outdoor promenades of coastal cities. Dining with a pet is relatively common in outdoor cafes throughout Southern California and Florida. In Miami Beach, for example, virtually all of the dozens of outdoor cafes that line Lincoln Road Mall accommodate patrons with their dogs. More recently, restaurants in the Northern states have been accommodating guests with dogs.

Dog-friendly patios even appeal to some diners without their pets. Karen Berndt, owner of the Harbor Fish Market & Grille (Baileys Harbor, Wisconsin), says the very presence of the animals at her upscale restaurant attracts vacationers who have traveled sans pet. Many request patio seating even when they have left their pets at home.

Some restaurants host special events for dog owners and their pets. Mutt Lynch Winery (Healdsburg, California), for instance, hosts private tastings and charity functions where the guests often consist of 300 humans and 100 or more dogs. The Sonoma County winery was voted the wine country's most dog-friendly winery by the monthly newspaper *Bay Woof* in San Francisco.

Bringfido.com, Dogfriendly.com, and Petfriendlytravel.com provide listings of restaurants nationwide that permit guests with dogs.

68.3 Dog Menus

Providing a bowl of water and sometimes complimentary treats has been standard fare for restaurants that accommodate patrons with dogs. Some restaurants have taken this service a step further, offering a menu for dogs. The following are some examples:

- Art and Soul restaurant on Capitol Hill in Washington, D.C., has a Puppy Patio Menu that includes a 3-ounce steak (\$5) and homemade doggie granola treats (\$5).
- Harbor Fish Market & Grille (Baileys Harbor, Wisconsin) offers special canine menu items such as scrambled eggs, chicken breast, and frozen custard (\$2.50 to \$3.95).
- Shake Shack (Miami Beach and New York City) serves The Pooch-ini® – Shackburger dog biscuits, peanut butter, and vanilla custard – for \$3.50.

68.4 Market Resources

American Pet Products Association, 255 Glenville Road, Greenwich, CT 06831. (203) 532-0000. (www.americanpetproducts.org)

GfK, 75 Ninth Avenue, 5th Floor, New York, NY 10011. (212) 240-5300. (www.gfk.com)

Harris Interactive, 60 Corporate Woods, Rochester, NY 14623. (585) 272-8400. (www.harrisinteractive.com)

FOOD & WINE FESTIVALS

69.1 Overview

More than 1,000 food festivals are held annually across the United States.

69.2 Prominent Food Festivals

The largest food festival in the U.S. is the 12-day Taste of Chicago, held annually in June, and attended by more than 3.6 million people. The event typically collects more than \$12 million in ticket revenue.

The following are other popular food festivals, many of which have annual attendance of 100,000 or more:

- A Taste of Colorado (Denver, CO; www.atasteofcolorado.com)
- ArtFeast (Santa Fe, NM; www.artfeast.com)
- Bite of Seattle (Seattle, WA; www.biteofseattle.com)
- Bridge City Gumbo Festival (Bridge City, LA; www.bridgecitygumbofestival.org)
- Charleston Food & Wine Festival (Charleston, SC; www.charlestonfoodandwine.com)
- Culinary Festival (Scottsdale, AZ; www.scottsdalefest.org)
- Epcot International Food & Wine Festival (Lake Buena Vista, FL; <https://disneyworld.disney.go.com/events-tours/epcot/epcot-international-food-and-wine-festival/>)
- Finger Lakes Wine Festival (Watkins Glen, NY; www.flwinefest.com)
- Food Network Wine & Food Festival (New York, NY; www.nycwineandfoodfestival.com)
- Hudson Valley Wine & Food Fest (Rhinebeck, NY; www.hudsonvalleywinefest.com)
- Minnesota Monthly Food & Wine Experience (Minneapolis, MN; www.foodwineshow.com)
- Mohegan Sun Winefest (Uncasville, CT; ww2.mohegansun.com/sitelet/winefest)
- National Shrimp Festival (Gulf Shores, AL; <http://alagulfcoastchamber.com/pages/ShrimpFestival>)
- Pebble Beach Food & Wine (Carmel, CA; www.pbfw.com)
- Pensacola Seafood Festival (www.fiestaoffiveflags.org/pensacola-seafood-festival)
- RoadKill Cook-Off (Marlinton, WV; <http://pccocwv.com/festival.htm>)
- Sugarland Wine & Food Affair (Houston, TX; www.sugarlandwineandfoodaffair.com)
- Taste of Atlanta (Atlanta, GA; www.tasteofatlanta.com)
- Taste of Buffalo (Buffalo, NY; www.tasteofbuffalo.com)

- Taste of Dallas (Dallas, TX; www.tasteofdallas.org)
- Taste of Main (Bellevue, WA; <http://tasteofmainbellevue.com>)
- Taste of Vail (Vail, CO; www.tasteofvail.com)
- Taste Washington (Seattle, WA; www.tastewashington.org)
- Vintage Ohio (Kirtland, OH; www.visitvintageohio.com)
- Vintage Virginia (Centreville, VA; www.vintagevirginia.com)
- Wine & Food Experience (New Orleans, LA; www.nowfe.com)
- Wine & Food Festival (Dallas, TX; www.dallaswineandfoodfestival.com)
- Wine Expo (Boston, MA; www.wine-expos.com)
- Wine Festival (Nantucket, MA; www.nantucketwinefestival.com)
- Winter Wine Festival (Naples, FL; www.napleswinefestival.com)
- World Chicken Festival (London, KY; www.chickenfestival.com)
- Zinfandel Festival (San Francisco, CA; www.zinfandel.org)

One of the grandest food festivals is three-day The Food & Wine Classic (www.foodandwine.com/classic), held in Aspen, Colorado, which will celebrate its 33rd year in 2014. Approximately 5,000 participants pay \$1,000 or more to sample wine, attend cooking seminars, and rub elbows with celebrity chefs at the event.

The Food Network's South Beach Wine & Food Festival (www.sobefest.com) is a four-day, star-studded destination event. Tickets may be purchased for the entire festival or individually for the approximately 60 events. In its 13th year, the 2014 festival was held February 20-23. Over 30,000 people attended the main events and another 20,000 attended separate, lower cost family-oriented festival events.

Vegfest, a series of annual vegetarian food festivals, is held in Boston, Detroit, Jacksonville, New York City, Portland, Salt Lake City, San Francisco, Seattle, Washington, D.C., and several other cities.

69.3 Market Resources

Directories of food festivals are available online at the following websites:

- www.festivals.com/food_beverage.aspx
- www.foodreference.com/html/upcomingfoodevents.html

HOLIDAY DINING

70.1 Overview

Although restaurants are an essential part of Americans' lives throughout the year, they also serve as a social oasis in times of celebration and special occasion.

According to the National Restaurant Association (www.restaurant.org), holiday dining, rank-ordered based on percentages of Americans dining out, is as follows:

- Birthdays: 55%
- Mother's Day: 38%
- Valentine's Day: 31%
- Father's Day: 23%
- New Year's Eve: 13%
- Easter: 13%
- Thanksgiving: 11%
- New Year's Day: 8%
- St. Patrick's Day: 7%
- Christmas Day: 6%
- Secretaries' Day: 6%

According to the National Restaurant Association, table-service restaurants derive between 4.6% and 6.1% of annual sales from gift cards, most of which are given as birthday or Christmas gifts.

70.2 Birthdays

Birthdays are the leading single occasion for dining out. According to a National Restaurant Association survey, 55% of people eat out on their birthday. A spouse's birthday is an occasion for dining out for 51% of survey participants. More than 33% eat out for a child's birthday.

A man is more likely to dine out on his wife's birthday than a woman is on her husband's birthday. Baby Boomers with teenagers under 17 years old are more likely to dine out to celebrate a child's birthday than other age groups.

Affluent households with two employed adults and children at home are most likely to dine out to celebrate the birthdays of everyone in the household.

70.3 Mother's Day

According to the National Restaurant Association, Mother's Day is the most popular formal occasion to dine out. National Restaurant Association research shows that 38% of Americans dine out on Mother's Day. A recent poll by Technomic (www.technomic.com) found more than half of respondents take their mother out for Mother's Day. The survey also found that of all ethnic groups, African Americans and Hispanics are the most likely to celebrate the occasion at a restaurant.

According to the association's Holiday Dining Survey, dining out on Mother's Day is more common among larger households; 44% of adults in households consisting of three or more individuals eat a Mother's Day meal at a restaurant, compared with 24% of one-person households. Respondents under age 25 and those ages 35-to-44 are more likely than older respondents to dine out on Mother's Day – 47% and 42%, respectively.

Among those who dine at a restaurant on Mother's Day, 59% celebrate the occasion at dinner, 51% at lunch/brunch, and 22% at breakfast. (The percentages add to more than 100% because many people have more than one restaurant meal on Mother's Day.) In addition, 62% of adults who celebrate Mother's Day with a special meal do so with their spouse, and 62% also do so with their mother or mother-in-law. Sixteen percent (16%) observe the day with their grandmother or spouse's grandmother, while 18% share the day with someone else.

70.4 Valentine's Day

According to the National Restaurant Association, Valentine's Day is the third most popular day of the year to dine out, with about 31% of Americans visiting a restaurant for the occasion. By age, the percentages that dine out for Valentine's Day are as follows:

- 18-to-34: 33%
- 35-to-45: 39%
- 55 and older: 27%

A survey by Zagat (www.zagat.com) found more couples dining out for Valentine's Day, with 43% reportedly doing so in 2013 and average spending of \$142.11.

Of those who responded to the Zagat poll, 78% said they prefer ordering from a regular menu rather than a special Valentine's Day menu.

Among those dining out for Valentine's Day, the following factors are most important in choosing a restaurant:

- General favorite: 42%
- Romantic atmosphere: 13%
- Special menu or promotion: 13%
- Picked by companion: 12%
- Restaurant they haven't been to before: 11%

The National Restaurant Association surveyed member restaurants on what type of promotions they offer around Valentine's Day. Responses were as follows:

- Special menu items: 63%
- Prix fixe menu: 45%
- Celebratory beverages or desserts: 34%
- Flower/candy: 28%
- Entertainment/music: 13%

70.5 Father's Day

According to the National Restaurant Association's Holiday Dining survey, 23% of Americans choose to celebrate Father's Day by dining out, an increase of six percentage points from a decade ago.

Larger households consisting of three or more individuals are more likely to dine out on Father's Day than were smaller households. Twenty-seven percent (27%) of adults in households with three or more individuals reported eating out on Father's Day.

Father's Day is the fourth most popular holiday or occasion to dine out.

In a recent poll by Technomic, four out of 10 consumers make plans to take their dad to a restaurant on Father's Day. One third celebrate the occasion at home. One interesting finding from the poll is that 56% of Hispanic families celebrate dads at a restaurant, compared to 40% of the population at large.

70.6 New Year's Eve

Approximately 13% of Americans dine out on New Year's Eve, and 8% eat at restaurants on New Year's day, according to the National Restaurant Association's recent Holiday Dining Survey.

Individuals between the ages of 18 and 34 are most likely to dine out on both New Year's Eve and New Year's Day, and males are more likely to do so than females.

70.7 Easter

According to the National Restaurant Association, 13% of Americans dine out on Easter Sunday, making this the sixth most popular holiday or occasion to dine out. Individuals ages 65 and older are more likely to dine out on Easter than any other age group (18%). Adults ages 35-to-44 are the second most likely to dine out during the Easter holiday (14%), while adults ages 25-to-34 are the least likely (9%). Men are more likely than women to have an Easter meal at a restaurant (15% and 11%, respectively).

In addition to offering Easter brunches and other meals in their establishments, many restaurants offer takeout options to complement meals eaten at home.

70.8 Thanksgiving

According to The NPD Group (www.npd.com), 51% of adults celebrate Thanksgiving somewhere other than their own home. Among those who eat at home, about half prepare turkey.

National Restaurant Association research finds that 53% of U.S. households use restaurant-prepared takeout items for all or part of their holiday menu.

Many restaurants are open on Thanksgiving, and approximately 11% of Americans typically have their Thanksgiving Day meal at a restaurant. Those living in smaller households and households without children are more likely to dine out on Thanksgiving. Males are more likely than females to eat at a restaurant on the holiday. Generally, younger adults are more likely to use restaurant takeout items as part of their Thanksgiving meal at home.

70.9 St. Patrick's Day

Pubs and restaurants throughout North America celebrate St. Patrick's Day. Savannah and Boston hold the largest celebrations.

According to the Savannah Area Convention & Visitors Bureau, 500,000 to 700,000 people attend the annual parade, including some international visitors. There are no economic impact figures, but it is the busiest time of the year for most downtown retailers, hotels, restaurants, and bars.

Many restaurants on St. Patrick's Day serve green beer and feature true Irish dishes. To re-create a true Irish pint of stout some pubs install a special pour system that improves the creaminess of the pint.

70.10 Oktoberfest

Oktoberfest has evolved into an annual celebration of beer. Despite the event's name, most Oktoberfests, including the original in Munich, kick off in September.

The following are some noteworthy Oktoberfest celebrations in North America:

- Oktoberfest Zinzinnati, which draws half a million people, is the largest beer festival outside of Munich. According to a recent study commissioned by the Greater Cincinnati Chamber of Commerce, Oktoberfest Zinzinnati has direct spending of \$20.4 million and an economic impact of \$42.2 million.
- Approximately 200,000 revelers annually participate in Tulsa's Oktoberfest, called one of the world's top German food festivals by *Bon Appétit* magazine.
- A two-month celebration in Helen, Georgia, a Bavarian-themed mountain town with a population of 300, attracts 50,000 devotees of beer and bratwurst.
- The 40-year-old LaCrosse, Wisconsin, Oktoberfest has earned the reputation as one of the best Old World folk festivals in the U.S.

70.11 Super Bowl Sunday

If Super Bowl Sunday – a quasi-holiday in America – was ranked among traditional holidays as an occasion for restaurant patronage, it would rank seventh. For many bars and restaurants, it is the biggest sales day of the year.

According to the National Restaurant Association, approximately 15% of Americans order takeout or delivery from a restaurant for an at-home Super Bowl gathering. For younger adults (ages 18-to-34) the figure increases to 22%. Of those who order takeout or delivery, approximately 58% order pizza, 50% order chicken wings, and 20% order subs or sandwiches.

70.12 Market Resources

National Restaurant Association, 2055 L Street NW, Suite 700, Washington, DC 20036. (202) 331-5900. (www.restaurant.org)

Technomic, Inc., 300 South Riverside Plaza, Suite 1200, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)

The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700. (www.npd.com)

LICENSING

71.1 Market Assessment

According to *The Licensing Letter*, retail sales of restaurant-branded licensed merchandise in 2012 was \$4.29 million (most recent data available), a 3.9% increase over 2011.

71.2 Case Studies

Boston Market

- Boston Market terminated its licensing agreement with Heinz in 2012, shifting its product line to Overhill Farms, which manufactures, distributes, and markets the chain's line of branded frozen meals. Under the Heinz licensing agreement, sales of 30 Boston Market frozen meals in 2010 reached more than \$100 million.

California Pizza Kitchen

- One of the most prominent brands among restaurant-branded grocery products is California Pizza Kitchen, whose licensing agreement with Kraft Foods dates to 1998. Annual sales of frozen California Pizza Kitchen products are \$160 million, according to *The Wall Street Journal*; licensing royalties are \$6.6 million.

Cinnabon

- Cinnabon, a brand of Focus Brands, has more than 50 licensed retail products. Combined annual retail sales are about \$400 million.

“There’s Cinnabon branded bread, cream of wheat, bagels, a bake mix for muffins, Toaster Strudels, cereal, pancake syrup, nuts, popcorn, and coffee creamer, to name a few.”

Nation’s Restaurant News

Dunkin' Donuts'

- Dunkin' Donuts' licensed coffee, marketed by Smucker's, has annual retail sales of approximately \$250 million, according to *Nation's Restaurant News*. Dunkin' Donuts also sells its own retail line of packaged coffee in its stores.

Jamba Juice

- Jamba Juice has one of the more ambitious licensing programs. Its licensed product portfolio includes nine partnerships with products including energy drinks, fruit-flavored coconut water drinks, novelty frozen desserts, and a home smoothie kit. Recently developed products awaiting licensing include energy bars and yogurt. According to James White, CEO of Jamba Juice, the company's goal is \$1 billion in retail sales, or about \$500 million at wholesale, for its licensed products. Royalty rates range from 4% to 7% of wholesale revenue.

P.F. Chang's China Bistro

- The chefs at P.F. Chang's China Bistro created a line of frozen meals licensed by ConAgra for manufacturing and distribution to supermarkets. The products, launched in 2010, emphasize convenience – dinners for two are promoted as being skillet-ready in 13 minutes or less. Annual sales are more than \$100 million, according to *Nation's Restaurant News*.

Starbucks

- Starbucks has numerous licensed products, the largest being its Frappuccino chilled coffee drinks, produced by North American Coffee Partnership, a partnership with PepsiCo. Launched in 1996, annual U.S. retail sales of Frappuccino surpass \$1 billion. Partnering with Acosta Sales and Marketing (www.acosta.com), Starbucks launched the VIA Ready Brew instant coffee line in 2009, with sales reaching \$135 million during its first year. In 2011, Starbucks ended its licensing agreement with Kraft, taking its bagged coffee and tea distribution in-house. Starbucks continued to expand its lines of licensed products in 2012 with the acquisition of the Teavana retail tea brand for \$620 million and the Le Boulange bakery brand for \$100 million.

Whataburger

- Whataburger introduced in 2013 its Fancy Ketchup, Spicy Ketchup, and Original Mustard online after debuting them in the H-E-B grocery chain. Unlike most brands that chose third-party fulfillment centers, Whataburger handles its own order fulfillment.

“We’ve had customer requests for our ketchup for a long while. We had the people, the technology and the order process already built. After we had the supply chain built for H-E-B, it was pretty easy to put it online.”

Dino Del Nano
Senior Vice President
Nation’s Restaurant News, 7/22/13

Wolfgang Puck

- Celebrity chef Wolfgang Puck has created a restaurant, media, and licensed products business worth \$20 million annually, according to an estimate by *Forbes*. Annual sales for Wolfgang Puck retail products are around \$150 million, according to *Nation’s Restaurant News*.

71.3 Market Resources

EPM Licensing Letter Sourcebook, *The Licensing Business Handbook*, and *The Licensing Letter*, EPM Communications, 19 West 21st Street, #303, New York, NY 10010. (212) 941-0099. (www.epmcom.com)

LOCALLY SOURCED & ORGANIC FOOD

72.1 Local & Organic Preferences Among Consumers

In a recent survey by the National Restaurant Association (www.restaurant.org), 64% of adults said locally sourced menu items are important when choosing a full-service restaurant (FSR); 43% said organic or environmentally friendly food was important. In choosing a quick-service restaurant (QSR), locally sourced and organic menu items were cited as an important consideration by 63% and 45% of adults, respectfully. By gender and age, those placing a priority on locally sourced and organic menu items are as follows:

	Locally Sourced		Organic/Environmentally Friendly	
	FSR	QSR	FSR	QSR
Gender				
• Men:	59%	60%	38%	40%
• Women:	69%	65%	47%	50%
Age				
• 18-to-34:	58%	58%	46%	48%
• 35-to-44:	68%	67%	37%	40%
• 45-to-54:	63%	63%	44%	46%
• 55-to-64:	67%	64%	44%	45%
• 65 and older:	68%	65%	41%	43%

There has been a trend of increased demand for locally sourced foods at restaurants, farmers' markets, and groceries among patrons over organic foods.

A survey of 1,854 members of the American Culinary Federation (www.acfchefs.org) asked chefs to rank the importance of 214 menu trends. Locally sourced meats and seafood ranked first in the survey; locally sourced produce ranked second.

The following percentages of restaurants offer locally sourced foods, according to the National Restaurant Association:

	Produce	Meat or Seafood
• Fine-dining:	87%	75%
• Casual-dining:	63%	55%
• Family-dining:	63%	59%

72.2 Locavores

As concerns about food safety rise, the number of locavores – those who eat locally produced foods when available – is also increasing. While locally grown foods are not necessarily healthier, consumers are comforted by knowing the source of their food items.

Opinions vary among consumers as to what constitutes 'local' food products. In a recent survey by The Hartman Group (www.hartman-group.com), consumers defined 'local product' as follows:

- Within 100 miles: 50%
- Within my state: 37%
- Within a region: 4%
- In the United States: 4%

Analysis by A.T. Kearney (www.atkearney.com) asking if shoppers are willing to pay more for local foods found the following responses:

- Single urban households: 95%
- Young couples w/o kids: 78%
- Affluent families: 71%
- Senior citizens: 68%
- Middle income families: 67%
- Low income families: 57%

In a survey by Mintel (www.mintel.com), however, only 28% of consumers said they would be willing to pay more for menu items that were sourced locally.

Grocery shoppers largely embrace the increase in local food options because they believe it helps local economies (66%), delivers a broader and better assortment of products (60%), and provides healthier alternatives (45%). Some shoppers say they buy local food to improve the carbon footprint (19%) and to help increase natural or organic production (19%).

Shoppers will switch stores for a better local food selection, with almost 30% of grocery shoppers saying they consider purchasing food elsewhere if their preferred store does not carry local foods. When asked about the availability of local food at their preferred supermarket, 65% say their supermarket offers at least some kind of locally sourced food. Only 5% indicate they shop for local foods at big-box retailers, 15% at national supermarkets. Overwhelmingly, respondents say their main source for local food is still the local farmers market and farm stores.

The importance of local food received increased awareness when the first lady, Michelle Obama, emphasized the need for fresh, unprocessed, locally grown food by planting a vegetable garden on the White House grounds.

72.3 Local Sourcing At Limited-Service Restaurants

While local items most frequently are found on fine-dining, upscale casual-dining, and independent restaurant menus, a few limited-service chains also stand out. Chipotle Mexican Grill, for example, purchases at least 25% of its romaine lettuce, green bell peppers, jalapeños, and onions from farms within 200 miles from restaurants. The 1,250-restaurant chain purchases over 75 million pounds of naturally raised and locally processed meats annually.

Several other chains source select local food products for some regional locations. McDonald's outlets in Washington State, for instance, purchase all of the milk, 95% of potatoes and fish filets, and 85% of apples from Pacific Northwest sources.

Sysco, the largest foodservice distributor in the U.S., has set up localcrop.com, a website that solicits local farmers to make their products available to local restaurants.

Most large restaurant chains find it impractical to source more than a few select menu items locally, primarily because local farmers simply cannot provide food products in the quantities required. Uno Chicago Grill, for example, had set up a project for a Maine farmer to supply tomatoes to its restaurants in the Northeast; the project lasted only three weeks because the farmer could not keep up with demand.

Few diners are aware of the safeguards that protect the food they eat in restaurant chains. Darden Restaurants, for instance, employs over 50 biologists and public health specialists, 17 field plant inspectors, and 20 quality control managers who review and certify the food products of the 1,500 suppliers who serve its 1,800 restaurants.

Adding hundreds or thousands of small local farmers to the supply chain of a major restaurant corporation – and subjecting them to the same rigorous safety standards as current suppliers – would be an impractical task.

72.4 Chef- and Restaurant-owned Farms

Several chefs and restaurateurs have acquired farms to supply their restaurants with fresh produce. Great Performances (www.greatperformances.com), a New York City-based caterer, for example, acquired Katchie Farm, a 60-acre organic farm in Kinderhook, New York, with some 29 different varieties of vegetables – from arugula to winter squash – as well as a selection of culinary herbs.

Other restaurants with their own farm operations include 610 Magnolia (Louisville, KY; www.610magnolia.com), Bern's Steak House (Tampa, FL; www.bernssteakhouse.com), Dahlia Lounge (Seattle, WA; www.tomdouglas.com), Manresa (Los Gatos, CA; www.manresarestaurant.com), and Primo (Rockland, ME; www.primorestaurant.com).

A similar pairing is farms that operate restaurants on site. One such is Blackberry Farm (www.blackberryfarm.com), a 4,200-acre farm in Walland, Tennessee. As well as dining, Blackberry Farm offers 63 guest accommodations, which include three meals per day of the farm's celebrated Foothills Cuisine. The following are other

farm-based restaurants:

- 21 Acres (Woodinville, WA; www.21acres.org)
- Arrows Restaurant (Ogunquit, ME; www.arrowsrestaurant.com)
- Blue Hill at Stone Barns (Pocantico Hills, NY; www.bluehillstonebarns.com)
- Celebrity Dairy (Silver City, NC; www.celebritydairy.com)
- Everett Family Farms (Soquel, CA; <http://everettfamilyfarm.com>)
- Flow at 14 Acre Farm (Jim Thorpe, PA; www.14acrefarm.com)
- Inn at Baldwin Creek (Bristol, VT; www.innatbaldwincreek.com)
- Gathering Together Farm (Philomoth, OR; www.gatheringtogetherfarm.com)
- Paradise Farms (Homestead, FL; www.paradisefarms.net)
- Patowmack Farms (Lovettsville, VA; www.patowmackfarm.com)
- Shelburne Farms (Shelburne, VT; www.shelburnefarms.org)
- The Loft at TradersPoint Creamery (Indianapolis, IN; www.traderspointcreamery.com)

Some restaurants partner with local farms to sponsor periodic farm-to-table dinners where their patrons and food providers can mingle. Eno Terra Restaurant (Kingston, NJ; www.enoterra.com), and Michael's Genuine Food & Drink (Miami, FL, www.michaelsgenuine.com), among others, have such programs.

72.5 Organic Menus

While the interest in organic foods was first seen in supermarket food purchases, demand has increasing in the restaurant sector.

“While the growth in organic purchases is primarily in the retail category, consumers are demanding these offerings more when they dine out, and restaurant operators need to meet these demands.”

Nation's Restaurant News

Chains that focus wholly or primarily on organic menus include Evos (www.evos.com), FreeFoods NYC (www.freefoodsnyc.com), and Pizza Fusion (www.pizzafusion.com).

LOYALTY PROGRAMS

73.1 Overview

Repeat business is among a restaurant's most important assets, and many restaurateurs are adding or refining frequent-diner programs to draw guests in and keep them coming back. Restaurant businesses are using discounts, free meals, rewards points, and gift cards as they try to attract this repeat business.

73.2 Restaurant Programs

A survey by the National Restaurant Association (www.restaurant.org) found that roughly one out of four full-service and quick-service restaurants offer frequent-diner programs.

Based on survey responses, the following percentages of restaurants reported their programs were more popular than the previous year:

- Fast-casual: 61%
- Family-dining: 59%
- Fine-dining: 53%
- Quick-service: 53%
- Casual-dining: 46%

73.3 Customer Participation

Overall, 36% of adults participate in a frequent-diner program at a full-service restaurant, fast-food place, or coffee shop. Among this group, the types of restaurants whose programs they participate in are as follows (source: National Restaurant Association):

- Off-premises/delivery: 51%
- Quick-service: 43%
- Full-service: 42%

Women are more likely than men to participate (41% versus 31%), and young adults are more likely than older adults to participate.

73.4 Social Networking With Loyalty Customers

Many restaurants have integrated loyalty programs with their social networking sites. One example is Tasti D-Lite, which linked its TastiRewards loyalty program through the point-of-sale system to Facebook, Twitter, and Foursquare. When loyalty-club members swipe their TreatCards at the POS, a tweet, a Facebook post, and check-ins on Facebook Places and Foursquare are sent to those customers' friends and followers. The messages contain a coupon for the friends and followers.

Another concept marrying loyalty rewards with social networking is Plink (www.plink.com), which offers users cash as well as Facebook credits and other rewards from purchases at participating restaurants like Red Robins, Taco Bell, and Outback Steakhouse.

An expansion of the of loyalty programs tied to social sites sees loyalty rewards tied to mobile phones and bank cards that are linked to social apps. Paper cards and keychain fobs are fading away as loyalty programs are adopting these new platforms.

Through such providers as Mocapay, Punchh, Front Flip, and Level Up, customers snap a photo of their receipt or scan a code with a smartphone or simply use their linked credit card and rewards are seamlessly registered.

Brands using such virtual platforms glean valuable data on their customers (location, frequency of visits, spending, etc.) that allows them to more narrowly target discounts and rewards and tailor future programs.

73.5 Recent Developments

The following are profiles of select loyalty programs (source: *Nation's Restaurant News*, February 2014):

Dunkin' Donuts

- Program: DD Perks
- Platform: loyalty card, mobile application
- Perks Offered: five points for ever \$1 spent, with 200 points earning a free medium beverage; personalized offers based on previous orders
- Launch date: 2014 nationwide
- No. of Members: 4 million users have downloaded mobile app

McDonald's

- Program: various tests of mobile loyalty solution
- Platform: varies by market; final systemwide solution likely to encompass mobile ordering, payment, and loyalty
- Perks Offered: some franchisees are experimenting with QR-code-based loyalty app Front Flip, which offers random rewards such as free food or coupons; other marketing co-ops are testing a mobile payment solution that could integrate loyalty functions
- Launch Date: to be determined
- No. of Members: to be determined

Panera Bread

- Program: MyPanera
- Platform: loyalty card
- Perks Offered: “surprise and delight” freebies based on established buying patterns and favorite purchases, exclusive invitations to try new items, interactions with Panera bakers, recipe books, and cooking ideas
- Launch Date: November 2010
- No. of Members: more than 15 million

Papa John’s Pizza

- Program: Papa Reward
- Platform: loyalty program with user profile that saves payment information and favorite orders, managed completely online
- Perks Offered: one Papa Rewards Point for every \$5 spent, with 25 points redeemable for a free large pizza with up to three toppings
- Launch Date: October 2010
- No. of Members; undisclosed

Red Robin Gourmet Burgers

- Program: Red Robin Royalty
- Platform: loyalty card, though users can manage their accounts without a card by giving their servers the telephone number of the linked account
- Perks Offered: a free birthday burger; \$20 toward a sixth visit after five visits in first five weeks of enrollment, every 10th item is free, exclusive special offers such as free appetizers or free kids’ meals
- Launch Date: January 2011
- No. of Members: 2.7 million

Starbucks Coffee

- Program: My Starbucks Rewards
- Platform: loyalty card and mobile app that track “stars” earned with in-store and packaged coffee purchases through “Star Codes” on bags
- Perks Offered: three tiers – Welcome, free beverage or treat on user’s birthday and discounts at starbucksstore.com; Green, Welcome-level benefits, plus free refills; Gold, Green-level benefits, plus a free beverage or food item every 12 stars, a personalized gold card, and offers sent via e-mail or text
- Launch Date: December 2009, with merge of Starbucks and Starbucks Gold into one platform
- No. of Members: estimated 9 million

NON-TRADITIONAL RESTAURANT SITES

74.1 Pop-Up Restaurants

Pop-up restaurants, often operated by notable chefs and restaurateurs, are temporary restaurants that open for brief time periods. They often are setup in conjunction with festivals. While not a new concept, pop-up restaurants have become trendy through social media that keeps patrons updated. The following are some examples of pop-up restaurants:

- Former contestants from Bravo TV's *Top Chef* cooked two at a time for six days each at The Top Chef Kitchen, a pop-up restaurant that operated in New York City's Tribeca neighborhood. Chefs Richard Blais, Jennifer Carroll, Tiffany Derry, Tiffani Faison, Mike Isabella, Edward Lee, Antonia Lofaso, Paul Qui, Grayson Schmitz, and Fabio Viviani participated. The pop-up was staged to help kick off the 10th season of the show.
- California chef Gary Menes hosts a pop-up restaurant called Le Comptoir (www.lecomptoirla.com) at various locations in the Los Angeles vicinity.
- Michelle Bernstein (www.chefmichellebernstein.com), a James Beard Foundation Award-winning chef, operated The Kitchen At Orchid in conjunction with The Pleasure Garden, a three-month theatrical pop-up entertainment experience in Miami.
- Sushi Samba (www.sushisampa.com), a popular restaurant in Miami Beach, opened Samba Pop for two weeks in conjunction with Art Basel, the largest annual arts festival in the U.S.

74.2 Restaurants At Auto Dealerships

While most auto dealerships only install vending machines in their lobbies, a few have opened restaurants as a convenience for their customers.

The following are examples of auto dealership restaurants:

- Dal Toro at Lamborghini (Las Vegas, NV; <http://daltoro.com/las-vegas>)
- Horseless Carriage Restaurant (North Hills, CA; www.galpin.com/the-horseless-carriage-restaurant)
- Twin Creeks Cafe at Frank Motor Co. (Fort Worth, TX; www.facebook.com/TwinCreeksCafe)
- Vintana Wine + Dine at Lexus Centre of Escondido (Escondido, CA; www.cohnrestaurants.com/vintana and www.lexusescondido.com)

74.3 Restaurants At Car Washes

Having a restaurant located at a car wash can be convenient for customers. The following are examples of operators that combine dining and full-service bars at car washes:

- 34th Street Burgers + Deli at the Sparkling Image Car Wash (Bakersfield, CA; www.sparklingimage.com)
- Auto Spa Bistro (Atlanta, GA; www.autospabistro.com)
- Car Wash Cafe (Kilmarnock, VA; no website)
- Chamois Restaurant/Car Wash (Mattawan, MI; www.facebook.com/pages/Chamois-RestaurantCar-Wash/102228449836700?sk=wall)
- Europa Car Wash & Cafe (Miami, FL; www.europainmiami.com)
- Metro Organic Bistro at Karma Car Wash (Miami, FL; www.karmacarwash.com)
- The Hub Car Wash & Diner (Colorado Springs, CO; www.thehub.com)

74.4 Restaurants At Museums and Tourist Attractions

Museums and other tourist attractions are increasingly being paired with upscale dining to enhance the visitor experience. The following are some of the most recognized (sources: *Bloomberg Businessweek*, *USA Today*, and local media sources):

- Albert's at the San Diego Zoo (San Diego, CA; www.sandiegozoo.org/zoo/dining.html)
- Cafe Alcazar at the Lightner Museum (St. Augustine, FL; www.thealcazarcafe.com/cafe-alcazar)
- Gertrude's at the Baltimore Museum of Art (Baltimore, MD; www.gertrudesbaltimore.com)
- Mr. Rain's Fun House at the American Visionary Art Museum (Baltimore, MD; www.mrrainsfunhouse.com)
- Museum Restaurant at the Philadelphia Museum of Art (Philadelphia, PA; www.philamuseum.org/dining)
- The Modern at the Museum of Modern Art (New York, NY; www.themodernnyc.com)
- The Restaurant at the J. Paul Getty Museum (Los Angeles, CA; www.getty.edu/visit/see_do/eat_shop.html)
- Treviso at The John and Mable Ringling Museum of Art (Sarasota, FL; www.ringling.org/dining)
- Zola at the International Spy Museum (Washington, DC; www.spymuseum.org/shop/zola.php)

74.5 Restaurants At Parks and Botanical Gardens

- Arizona Room (Grand Canyon National Park, AZ; www.grandcanyonlodges.com/arizona-room-418.html)
- Bartolotta's Lake Park Bistro (Lake Park, Milwaukee; WI; www.lakeparkbistro.com)

- Beach Chalet Brewery and Restaurant (Golden Gate Park, San Francisco, CA; www.beachchalet.com)
- Boathouse Forest Park (St. Louis, MO; www.boathouseforestpark.com)
- Café Phipps at Phipps Conservatory & Botanical Garden (Pittsburgh, PA; <http://phipps.conservatory.org/visit-hipps/cafe-hipps.aspx>)
- Glass House Cafe at Fairchild Tropical Gardens (Coral Gables, FL; www.fairchildgarden.org)
- Jordan Pond Restaurant (Acadia National Park, ME, www.jordanpond.com)
- Lakota Dining Room at Sylvan Lake Resort (Custer State Park, SD; www.custerresorts.com/sylvan-lake-lodge/)
- North Pond (Lincoln Park, Chicago, IL; www.northpondrestaurant.com)
- Pineapple Room Restaurant at Cheekwood (Nashville, TN; www.cheekwood.org)
- The Ahwahnee (Yosemite National Park, CA; www.yosemitepark.com/Dining_AhwahneeDiningRoom.aspx)
- The Central Park Boat House Restaurant (Central Park, New York, NY; www.thecentralparkboathouse.com)

74.6 Restaurants At Retail Stores

Common years ago at large department stores, fancy tea rooms and restaurants are making a comeback among some retailers. High-end stores like Macy's, Neiman Marcus, and Nordstrom have restaurants.

“In the 1900s, many U.S. department stores ran restaurants and tearooms. Some achieved iconic status and continue to serve customers today, including Chicago’s Walnut Room at the former Marshall Field’s flagship (now a Macy’s) and the Zodiac restaurant at a Neiman Marcus store in Dallas. More recently, Nordstrom, which has offered food for many years, has tested operating a contemporary diner called Sixth & Pine and added espresso bars. The department store chain currently operates seven different kinds of in-store restaurants, for a total of more than 200 eateries and coffee bars.”

Bloomberg Businessweek

Macy's offers upscale dining at several of its U.S. locations. To develop its restaurant offerings, Macy's put together a team of 16 select chefs, including Rick Bayless, Cat Cora, Todd English, Marcus Samuelsson, Nancy Silverton, and Takashi Yagihashi, each of whom has created an in-store concept restaurant.

At its flagship location at Herald Square in New York City, Macy's has Stella 34, managed by Patina Restaurant Group. The cafe at Bergdorf Goodman in New York boasts views of Central Park. Ikea has restaurants in all of its stores worldwide, including its U.S. locations. The multilevel Ikeas have a quick-service restaurant on an upper floor, most with as many as 400 seats. Stores also have limited-menu bistros on the ground floor next to a section that sells Swedish packaged foods.

NUTRITION & HEALTHY DINING

75.1 Healthful Dining

Restaurant operators will continue to emphasize healthier fare in 2014 as more and more consumers are becoming nutrition conscious.

In a 2013 survey by the National Restaurant Association (www.restaurant.org), 64% of adults said healthy menu items are important when choosing a full-service restaurant (FSR); 65% said so about their choice of a limited-service restaurant (LSR). By gender and age, those placing a priority on healthy menu items are as follows:

	FSR	LSR
Gender		
• Men:	59%	57%
• Women:	68%	72%
Age		
• 18-to-34:	66%	67%
• 35-to-44:	59%	61%
• 45-to-54:	63%	64%
• 55-to-64:	65%	66%
• 65 and older:	66%	64%

According to *Healthy Eating Consumer Trend Report*, a 2013 report by Technomic (www.technomic.com), 38% of adults say they are more likely to visit restaurants that have healthy menu options, even if they do not order a better-for-you item. This was an increase from 33% who responded similarly to the same question in a 2010 survey.

The following are other findings of the study:

- Sixty-four percent (64%) of consumers say that it is important to eat healthy and pay attention to nutrition; 57% said so in a 2010 survey.
- Fifty percent (50%) of consumers say they would like restaurants to offer more healthy foods, and nearly as many say they would probably order these options if they were offered.
- More consumers in 2012 than in 2010 reported that they consume local, organic, natural, and sustainable foods at least once a week.
- Half of consumers say that descriptors such as low salt, low-fat, and low sugar clearly signal health, yet strongly detract from the taste of food. In contrast, foods that indicate a serving of fruit or vegetables or 100% whole wheat highlight health

while strongly enhancing consumers' taste perceptions.

According to The NPD Group (www.npd.com), 9% of all restaurant visits are made based on customers' desire for healthful or light fare, a figure that has remained relatively constant for five years.

75.2 Market Impact

A 2013 report by Hudson Institute (www.hudson.org) analyzed the influence on sales of lower-calorie menu options at 21 of the largest chain restaurants including Applebee's, Arby's, Burger King, McDonald's, Olive Garden, Outback Steakhouse, Panera Bread, Red Lobster, Taco Bell, and Wendy's. The study was funded by the Robert Wood Johnson Foundation (www.rwjf.org).

Among the 21 chains, 17 have increased lower-calorie options since 2006. These chains have experienced an 8.9% increase in total food servings, a 10.9% increase in traffic, and a 5.5% increase in same-store sales.

The four chains that decreased lower-calorie options experienced a 16.3% drop in food servings, a 14.7% decline in traffic, and a 5.5% drop in same-store sales.

75.3 Menu Labeling

Complying with provisions of the Patient Protection and Affordable Care Act, the U.S. Food and Drug Administration issued regulations for menu-labeling in late 2011.

Restaurant chains with 20 or more units will be required to post on their menus and drive-through signs calorie counts and information about how many calories a healthy person should eat daily. Restaurants in California are already required to post this information.

Challenges to the requirement were upheld by the U.S. Supreme Court, however, and the specific regulations and a timetable for implementation have not yet been promulgated.

A comparison of sales at quick-service restaurants with and without posted calorie information, conducted by The NPD Group, found the menu labeling had little effect on guest ordering patterns. Ordering for lunch and dinner was as follows:

	Without Labeling	With Labeling
• Average number of items ordered:	3.3	3.2
• Average calories ordered:	1,021	901
• Average check amount:	\$6.40	\$6.20

In a survey of restaurant patrons' attitudes, Technomic found that 65% favor nutritional labeling in restaurants, with the strongest demand for listing of calories and sodium content. Seventy percent (70%) of adults say they care that chain restaurants disclose calorie and other nutritional information on their menus; 68% want nutritional information on all restaurant menus, not just chains. About the same percentage claim that having this information is helpful in making ordering decisions and believe it has a

positive impact on consumer health and nutrition.

The restaurant industry, in general, has supported menu labeling initiatives.

“The National Restaurant Association has been pushing for menu labeling standardization since New York City became the first U.S. jurisdiction to require it in mid-2008.”

Nation's Restaurant News, 5/13/13

Many restaurant chains are proactively posting calorie information. McDonald's, the largest U.S. restaurant chain, began posting calorie counts on menus at its 14,000 U.S. locations in 2012. The chain also introduced an app that provides customers with information about calories in its products and helps them build a customized meal plan.

In addition to calorie data, some restaurant chains post information about ingredients, pointing out potential problems for those with food allergies and other dietary restrictions.

75.4 Reduced Sodium

There are indications that the next big dietary issue will be reducing sodium intake. Many consumers are aware that consuming too much salt has been linked to high blood pressure and have reduced the amount they use in cooking and at the table. There are increasing concerns, however, about high levels of sodium from processed foods and restaurant cuisine.

Today, the average American takes in about 4,000 mg of sodium daily; the adequate intake for healthy body function in people under 50 is only 1,500 mg. People over 50 need only 1,200 to 1,300 mg of sodium. The FDA has said most people can safely ingest up to 2,300 mg of sodium a day – that's equal to about one teaspoon of salt.

“As you go below the 2,300 mark, there is an absence of data in terms of benefit, and there begin to be suggestions in subgroup populations about potential harms ... including increased rates of heart attacks.”

Prof. Brian L. Storm, M.D.
University of Pennsylvania
The New York Times, 5/14/13

In January 2010, New York City unveiled a voluntary health initiative with a goal of 25% reduction of salt in restaurant and packaged food by 2015. Dr. Thomas Farley, the city health commissioner, claims support for the initiative from health agencies in other cities and states, suggesting that similar measures may soon be launched elsewhere.

Many restaurant chains have been proactive in reducing sodium in menu items before being mandated to do so. Au Bon Pain, Burger King, Denny's, and Yum! Brands, among others, have launched low-sodium initiatives.

75.5 Trans Fat

Recent campaigns by several federal agencies have focused public attention on health issues related to the consumption of trans fats. In response, most restaurant chains have at least addressed the issue, with many already reducing or eliminating foods with trans fats from their menus.

Several cities have banned, or are considering banning, trans fats at restaurants. Tiburon, California, was the first to do so, in 2005. As of 2008, all 24,600 restaurants and foodservice operations in New York City were required to cease using most frying oils containing trans fats. Trans fat controls have also been enacted in Philadelphia, Seattle, and other cities.

In 2008, California became the first state to ban trans fats in restaurants. Under the law, trans fats were excised from restaurant products beginning in 2010 and from all retail baked goods by 2011. Packaged foods are exempt.

In November 2013, the Food and Drug Administration announced plans to declassify partially hydrogenated oils (trans fats) as Generally Recognized as Safe (GRAS). This would virtually eliminate trans fats from food in the United States.

75.6 Dieting

A 2014 assessment by The NPD Group found a long-term decline in dieting among American adults. Nineteen percent (19%) of adults reported dieting in 2013, a drop from 31% who did so in 1991. By age, those who dieted are as follows:

	1991	2013
• 18-to-34:	20%	12%
• 35-to-44:	25%	16%
• 45-to-54:	35%	20%
• 55-to-64:	42%	24%
• 65 and older:	48%	29%

“Millennials will diet more as they age, but the core dieters in this country are Baby Boomers. Fewer of us are dieting. Americans are looking for other ways to define health.”

Harry Balzer, Chief Analyst
The NPD Group, 1/2/14

75.7 Portion Control

Scaled-down entrées – particularly small sandwiches and burgers – have caught on across all restaurant industry segments. The shift to smaller menu items is, in part, attributed to restaurants’ awareness of the obesity issue in America and the relevance of portion size to this problem. A survey of 300 chefs, conducted by Julie Obbagy, Ph.D., a nutritionist at USDA’s Center for Nutrition Policy and Promotion, Evidence Analysis Division, found that most believe the amount of food served in restaurants influences how much people eat, and that big portions are hard on people watching their weight. Sixty-nine percent (69%) of chefs say that cutting portion size is a better way to reduce calories than to modify existing recipes.

Surveys by The NPD Group found that while a majority of consumers have intentions to eat healthier, many do not carry out these plans. Fifty-three percent (53%) said they were going to limit their caloric intake, yet just 38% of consumers said they are actually doing so. Eating smaller, more frequent meals is the intention of 44% of adults, but only 29% actually put this into practice.

75.8 Market Resources

Hudson Institute, 1015 15th Street NW, Suite 100, Washington, DC 20005.
(202) 974-2400. (www.hudson.org)

National Restaurant Association, 2055 L Street NW, Suite 700, Washington, DC 20036.
(202) 331-5900. (www.restaurant.org)

Technomic, Inc., 300 South Riverside Plaza, Suite 1200, Chicago, IL 60606.
(312) 876-0004. (www.technomic.com)

The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700.
(www.npd.com)

RESTRICTIVE DIET MENUS

76.1 Overview

Mintel (www.mintel.com) estimates that 100 million Americans have a food intolerance of some type.

76.2 Gluten-Free Menu Items

The market for gluten-free products is projected to grow from \$4.2 billion in 2012 to roughly \$6.6 billion in 2017, according to Packaged Facts (www.packagedfacts.com).

According to *Gluten-Free Foods And Beverages In The U.S.*, 18% of U.S. adults look for gluten-free options (source: Packaged Facts):

The percentage of customers by age who eat gluten-free is as follows:

- Ages 18-34: 31%
- Ages 35-49: 27%
- Ages 50-64: 25%
- Ages 65 and older: 17%

Increasingly, restaurants are responding to people who eat gluten-free. Estimates of the number of Americans with celiac disease range from three million to 18 million, and an estimated 5% of restaurant visits are by guests with gluten issues.

In a recent NPD CREST® report on restaurant meals and snacking, about 1% of consumers indicated they had ordered food described on a menu as gluten free. Though only a small percentage, it is up more than double from four years ago and accounts for more than 200 million restaurant visits, according to The NPD Group (www.npd.com).

In a survey by the National Restaurant Association (www.restaurant.org), chefs named gluten-free/food allergy-conscious meals as one of the top 10 trends in both full-service and quick-service restaurants in 2013.

There was a surge in restaurant offerings of gluten-free menu items about two years ago. According to Technomic (www.technomic.com), the number of U.S. restaurants with gluten-free menus rose 61% in 2011. Growth into 2014, however, has been modest.

“It’s growing, but it’s still small. Operators need to pay some attention to it, but they don’t need to revamp the store, so to speak.”

Bonnie Riggs
The NPD Group
Nation’s Restaurant News, 4/29/13

When introducing gluten-free menu items, restaurants must take measures to ensure that ingredients in dishes are not contaminated with gluten protein from other items being prepared in the same kitchen.

“It’s not so hard offering gluten-free, but the contamination issue is the thing to watch for. You can serve hamburger with no bun, but if you’re using the same utensil to put a hamburger on a regular bun there’s [gluten] contamination. If you’re making a gluten-free pizza you have to make it in a different place, using different pans. You can’t just pick off croutons from a salad. It’s more than just saying we have a gluten-free menu.”

Deborah Ceizler, Director
Celiac Disease Foundation

76.3 Kosher Cuisine

More than 10 million people eat kosher products annually. According to Michael Cohen, a consultant and former owner of a kosher pizza business, approximately 50% of people who eat kosher do so because of their Jewish faith, 30% do so for health reasons, and the other 20% are non-Jewish and eat kosher for other reasons.

Certification agencies called mashgiachs supervise food production and preparation to ensure that food is kosher. According to *Kashrus Magazine*, which tracks kosher certification, there are approximately 1,100 kosher certification organizations in the U.S.

Lubicom (www.lubicom.com) estimates the U.S. retail market for kosher foods at \$13 billion.

According to a recent survey by Mintel, among the 21% of American adults who buy kosher products, 55% say they believe the products to be safer or healthier.

Kosher restaurants are mainly concentrated in large cities, especially those with a large Jewish population. One-third of the nation's Jewish population is within approximately 300 miles of New York City.

According to *Restaurant Business*, there has recently been an increase in openings of high-end kosher restaurants across the U.S.

In South Florida, kosher-Asian-fusion cuisine has become popular, and a number of Thai, Japanese, and other Asian chefs have set themselves apart in a competitive market thanks to Rabbinical supervision and technical advice.

Subway maintains several kosher restaurants in the U.S.

76.4 Halal Foods

Muslims are allowed to eat only Halal foods under Islamic dietary guidelines. The criteria specify what foods are allowed and how the food must be prepared. Guidelines focus mostly on types of meat/animal tissue.

In assessments of how many Muslims there are in the United States, estimates range widely – from 2 million to 7 million or more. An assessment by Pew Research Center (www.pewresearch.org) placed the number at 2.8 million.

Consumers have generally looked to Indian restaurants for Halal menus. An increasing number of restaurants in areas with large Arab-American populations are now offering Halal menu items. McDonald's locations in Dearborn, Michigan, for example, which has the largest concentration of Arab-Americans in the U.S., offers meals meeting Islamic dietary standards.

76.5 Vegetarian Cuisine

A survey by the National Restaurant Association found that 20% of consumers are likely to look for a restaurant that serves some vegetarian items.

According to the Vegetarian Resource Group (www.vrg.org), 3.4% of U.S. adults, or 7.5 million adults, do not eat meat, poultry, or fish and are considered true vegetarians. Many other people consider themselves vegetarian but may occasionally consume meat, poultry, or fish. Among non-vegetarians, 34% eat one or more meatless meals a week.

Gallup polls have found the number of people who identify themselves as vegetarian has remained steady at about 5% since 1999.

There are many forms of vegetarianism: Vegans eat no animals products whatsoever, including eggs and dairy; lacto-ovo vegetarians avoid meat but consume dairy and egg products; and lacto-vegetarians do not eat meat but consume dairy products. People choose not to consume meat for ethical, religious, health, and ecological reasons. An estimated two million U.S. adults are vegans.

It is becoming more common to find people whose dietary interests fall outside traditional categories like vegetarian, vegan, and omnivore. A recent survey by *Vegetarian Times* found that about 70% of its readers sometimes eat meat. Similarly, about 30% to 40% of the meat-eating population seek out vegetarian meals, at least occasionally.

According to Gavin Kaysen, a *Food & Wine* Best New Chef award winner, the increased popularity of vegetarian cuisine is, in part, due to creative preparations developed by fine-dining restaurant and resort chefs.

Technomic's MenuMonitor found vegetarian dishes on restaurant menus up by 22% over a three-month period.

76.6 Market Resources

Mintel, 333 West Wacker Drive, Suite 1100, Chicago, IL 60606. (312) 932-0400. (www.mintel.com)

National Restaurant Association, 2055 L Street NW, Suite 700, Washington, DC 20036. (202) 331-5900. (www.restaurant.org)

Packaged Facts, 11200 Rockville Pike, Suite 504, Rockville, MD 20852. (240) 747-3095. (www.packagedfacts.com)

Technomic, Inc., 300 South Riverside Plaza, Suite 1200, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)

The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700. (www.npd.com)

SEAFOOD

77.1 Seafood Entrees in Restaurants

According to The NPD Group (www.npd.com), restaurant patrons order 3.4 billion servings of fish and seafood at restaurants each year, which comprises about 6% of all restaurant orders. Distribution by type of seafood is as follows:

- Fish
 - Broiled, baked, grilled, raw: 23%
 - Fried: 14%
- Shrimp
 - Broiled, steamed, boiled, grilled: 21%
 - Fried: 13%
- All other seafood: 29%

77.2 Sustainable Seafood

SeaFood Business magazine found that 60% of independent restaurateurs, chain operators, and noncommercial executives ranked sustainability as one of their top three seafood-related concerns, following pricing and availability.

The depletion of many species of fish has forced chefs to rewrite their menus for years now, including everything from replacing old favorites to switching to farm-raised species. Some fish that were once restaurant staples have simply disappeared. Wild Atlantic salmon, for example, was so plentiful that some foodservice contracts specified it couldn't be served more than twice a week. It is now commercially extinct in North America. About 90% of the ocean's big predators – like cod and tuna – have been extremely over-fished. Increasingly, fish and shrimp farms are filling the shortfall.

“...this is more than a social and environmental concern; it’s a core business issue. We have a vested interest in ensuring that the supply of seafood on which we rely remains available, affordable, and meets the quality and safety standards we expect.”

Darden Restaurants, Inc.
Nation’s Restaurant News, 8/5/13

Many chefs today are joining groups such as the Seafood Choices Alliance (www.seafoodchoices.org) and Chef’s Collaborative (www.chefscollaborative.org), both of which work to educate fishers, chefs, and retailers on making responsible purchasing decisions. Compass Group, the largest foodservice company in the U.S., for example, has a sustainable seafood policy to reduce the use of red-listed species – those that scientists believe are in most danger of collapse – and, wherever possible, to replace those products made from a threatened type of fish with sustainable seafood options comparable in price and flavor.

Another approach toward sustainability is to encourage patrons to try new and less-endangered species of fish. Species like red snapper, grouper, halibut, and cod have been introduced onto menus so other, more popular yet endangered species can repopulate.

Fish that is different from what fisherman had intended to catch, also called bycatch or trash fish, is increasingly being menued. Restaurants such as Border Grill in Las Vegas boasts such catches as “the best seafood you’ve never tried.”

Use of farm-raised fish is another tactic. Though catfish, tilapia, salmon, and shrimp have dominated aquaculture for years now, a host of other species are now being farmed, too. Some already have attained the kind of flavor and quality that approaches their wild-caught counterparts, including oysters, caviar, trout, striped bass, and barramundi. Other farm-raised introductions to the market include tuna, halibut, snapper, turbot, and cod.

Another approach to sustainability is to offer some fish seasonally. Chefs are avoiding spawning times, for example, to protect juvenile fish.

77.3 Labeling

A seafood labeling investigation, reported in February 2013 by Oceana (www.oceana.org), found that 33% of more than 1,200 seafood samples purchased in

restaurants, supermarkets, and sushi counters was mislabeled. DNA testing was used to confirm species identification.

Of the most common fish types, samples sold as snapper and tuna had the highest mislabeling rates (87% and 59%, respectively). Between one-third and one-fifth of the halibut, grouper, cod, and Chilean sea bass tested were mislabeled.

Among sushi restaurants, 74% had at least one sample mislabeled. Thirty-eight percent (38%) of restaurants had at least one problem sample, as did 18% of grocery stores.

Seafood goes through many hands in the supply chain; substitution is easy and often difficult to track. Eighty-four percent (84%) of seafood consumed in the United States is imported, according to the National Fisheries Institute (www.aboutseafood.com). Selling one kind of fish under another name is illegal under FDA regulations, but there is little federal oversight.

According to *The New York Times*, much of the mislabeling occurs at sea or where distributors cut up a fish hundreds to thousands of miles away, making a filet's provenance hard to verify. Restaurants are often the unknowing victims of such substitution.

The Marine Stewardship Council (MSC, www.msc.org) has developed the Chain Of Custody certification program for restaurants. To be certified, restaurants must rigorously screen suppliers and require that they document all seafood. Suppliers are audited by a third party inspector to ensure that the seafood purchased is actually what it is declared to be. DNA testing is also conducted to verify certain species of fish. A list of certified restaurants in the United States is posted online at www.msc.org/where-to-buy/dining-out/usa.

77.4 Trends

Overall, seafood consumption has declined for seven consecutive years, according to the National Fisheries Institute (www.aboutseafood.com). The declines, however, have been with consumption at home, with servings at restaurants experiencing steady increases.

Surveys by The NPD Group found that customers who most frequently order seafood are over the age of 49 and have household incomes above \$75,000. Consumption is heaviest in the Northeast and South, particularly regions close to bodies of water that supply ample fresh seafood.

A sampling of menu items from 4,800 restaurants, conducted in 2012 by Datassentials (www.datassentials.com), found that truffle and aioli sauces and flavors are increasing in popularity for seafood preparation at restaurants. Asian and Latin-influenced flavors and ingredients are most popular for seafood dishes.

SNACKING

78.1 Overview

The National Restaurant Association (www.restaurant.org) forecasts snack shop and nonalcoholic beverage bar sales at \$30.69 billion for 2014, a 5.0% increase over 2013. Coffeeshops (see Chapter 21) account for almost half of the total.

Eight (8) snack chains (excluding coffeeshops) ranked among *Nation's Restaurant News's* list of 200 largest U.S. restaurant chains in 2013: Dunkin' Donuts, Krispy Kreme Doughnuts, Baskin-Robbins, Jamba Juice, Auntie Anne's Hand-Rolled Soft Pretzels, Cold Stone Creamery, Smoothie King, and Tropical Smoothie & Cafe. Their combined sales were \$8.91 billion; they operated 13,672 units.

Snack-eating places include a wide range of venues: bakeries, cupcake shops, doughnut shops, ice cream shops, juice bars, pastry shops, pretzel stands, smoothie bars, and more. Although the snack sector is driven primarily by prepared and packaged items, fresh whole foods like fruits are found to be the most popular snack food of all. In fact, fresh fruit is the top snack food consumed in the United States and also the fastest growing, according to *Snacking in America*, a report by The NPD Group (www.npd.com).

Fresh fruits are consumed in 10 more snack occasions a year than chocolate – the second-most popular snack food – and 25 more occasions a year than the third-most popular snack item, potato chips.

The study also found more Americans to be consuming less during main meal times (i.e., breakfast, lunch, dinner) while increasing between-meal snack occasions. Ultimately, consumers are redefining completely what is a snack and when is a snack occasion.

78.2 Restaurant Snacks

According to *Snacking Occasion Consumer Trend Report*, by Technomic (www.technomic.com), 48% of consumers say they snack at least twice a day. Restaurants are capitalizing on the growing snacking occasion by offering quick, portable, smaller-portioned, low-priced food and drink in a myriad of ways to continue gaining share of snack purchases. Restaurants garner 22% of consumers' snacking occasions.

The following are other findings of the Technomic study:

- Major chains are using late-night hours to promote value-oriented snack items and

- bar plates to cater to younger customers who visit more often for late-night snacks.
- Thirty-seven percent (37%) of consumers have broadened their definition of snacks to include more types of foods, beverages, and restaurant fare.
 - The mini sandwich, slider, or wrap has evolved from a simple snack item to a downsized gourmet version of signature full-sized offerings.
 - Sixty-two percent (62%) say that most of the snacks they purchase for away-from-home consumption are impulse purchases.
 - Thirty-three percent (33%) of consumers say they are increasingly looking for more healthful snack options.

78.3 Snacking Trends

Snacking is not only defined by the types of foods eaten (candy, chips, etc.) or time of consumption (during the hours in between main meals,) but also by portion size. Increasingly, consumers are downsizing portions of larger meals and enjoying them as snacks. A slider vs. regular-size burgers, an empanada vs. a burrito, cheese bites rather than a side of mac & cheese with the meal are increasingly feeding off-meal-time cravings.

“Consumers’ definition of snacking has changed.”

Bonnie Riggs, Analyst
The NPD Group
Nation’s Restaurant News, 6/10/13

Another trend with snacking is its social aspect, or social snacking, with groups gathering to share a variety of small-bite dishes. Like tapas, long popular in Spain, and dim sum from Korea and mezze in Greece, this style of snacking is being found on more and more U.S. menus.

Quick-service restaurants typically offer more snacking options with bite-size options and dollar-menu fare, but fast-casual chains are trying to appeal to snackers. T.G.I. Friday’s, for example, recently introduced a Taste & Share Menu priced between \$4.99 and \$6.99. Skewers, tacos, and meatballs are some of the offerings.

New York-based Nuchas is built entirely upon snacking through its food truck and kiosk service. It’s empanadas, Argentine-style meat pies, are grab-n-go, snack-size bites that can satisfy between-meal cravings.

TABLETOP ORDERING & PAYMENT

79.1 In-Restaurant Ordering Via Tablet

Some restaurants have introduced tabletop devices or tablet computers to allow diners to look at meal options, order, and pay for meals. The devices typically rest inside metal frames that sit a few inches off the tabletops.

Tabletop ordering was used in only a few restaurants across the U.S. as recently as 2011. In 2012, more chains began to experiment with the concept with test installations at a few locations. Initial installations proved successful for restaurant operators and were popular with customers. Devices were installed in hundreds of restaurants across the U.S. in 2013. TableTop Media, supplier of the Ziosk tabletop ordering system, reported in mid-2013 that its devices were being used by about 7 million people monthly.

Tabletop ordering technology became widespread in 2014. Among casual-dining chains using tabletop ordering are Buffalo Wild Wings, Chevys Fresh Mex, Chili's Grill & Bar, Red Robin Gourmet Burgers, and Uno Chicago Grill. Many within the restaurant industry foresee that tabletop ordering will be standard protocol at casual-dining restaurants within a few years.

“Guest self-ordering at counter- and full-service will be done either online prior to arriving or on-site via tabletop interface, smartphone or tablet, or by kiosk.”

Restaurant Industry 2020
National Restaurant Association, 9/13

In a 2013 survey by the National Restaurant Association (www.restaurant.org), 44% of adults said they would use an electronic ordering system at the table in a full-service restaurant if available; 52% said they would use an electronic payment system.

79.2 Case Studies

In 2013, Chili's Grill & Bar tested tabletop tablet devices at 28 locations in Dallas, Jacksonville, and San Diego. In early 2014, the chain installed the devices at all of its 823 company-owned locations and many of its 800 franchised units. Chili's reports that 50% of guests pay using the devices. Entertainment options are offered on the tabletop tablets; about 10% of guests buy a 99¢ video game while dining. The devices also collect email addresses for Chili's Email Club.

“We saw increases in per-person average check. People are buying more food and add-ons like desserts and drinks at the table. We saw double-digit increases in dessert sales during our test.”

Edithann Ramey, V.P. Marketing
Chili's Grill & Bar
Nation's Restaurant News, 10/7/13

Genghis Grill, a 107-unit chain, is testing tabletop ordering at select locations. The operator reports that about 65% of guests use the devices to place orders after a host has introduced them to the technology. The system adapts well to the restaurant's Mongolian Stir Fry concept, which allows guests to compose their own bowls, and the technology has proven beneficial for beverage sales.

“Everyone is in a hurry now, so it's a matter of convenience. The staff likes the devices and fears about lower tips have been unfounded.”

Ron Parikh, Chief Marketing Officer
Genghis Grill
Nation's Restaurant News, 8/5/13

About 60% of guests pay using the devices, and tips are in the 15% to 20% range.

79.3 Beverage Service

Most restaurants do not allow guests to order their first alcoholic beverage via device; waitstaff must verify with the first order that the guest is over 21. But tabletop ordering is proving ideal for customers who wish to place beverage reorders without having to wait for a server.

The technology also allows presentation of extensive beverages lists where more detail can be provided than with a traditional print menu.

Bone's Restaurant (Atlanta) uses iPads to present its wine list; wine sales increased 20% during the first six months following introduction of the concept.

79.4 Payment Via Devices

Some restaurants have implemented digital payment systems. T.G.I. Friday's, for example, provides an app for smartphone and tablet users that allows guests to open tabs and then pay for their meal from their own device.

“The ability for guests to pay at the table was probably the biggest feature we saw with an immediate impact on speed of service. That piece of the casual-dining experience was often frustrating for customers. Keeping the credit card at the table and in front of the guest certainly adds some comfort level to our guests and to us.”

Tadd Demars
Director of Restaurant Services
Food Management Investors
Nation's Restaurant News, 8/5/13

Operators report that up to 75% of guests use the devices to swipe their own payment cards. Customers save more than five minutes when doing so.

79.5 Device Suppliers

E la Carte Inc., San Francisco, CA 94109. (650) 468-0680. (www.elacarte.com)

eTab International Inc., 5017 Washington Place, Suite 202, St. Louis, MO 63108.
(800) 971-3008. (www.e-tab.com)

HubWorks Interactive Inc., 701 E. Front Avenue, Coeur d'Alene, ID 83814.
(208) 755-0949. (www.hubworks.com)

TableTop Media, 12404 Park Central Drive, Suite 350, Dallas, TX 75251.
(214) 580-4800. (www.ziosk.com)

TAKEOUT & DELIVERY

80.1 Market Assessment

According to The NPD Group (www.npd.com), the average U.S. consumer purchases 127 meals annually at restaurants for consumption elsewhere. For comparison, the average customer buys 81 meals for consumption in a restaurant.

Restaurant takeout and delivery sales are estimated as follows:

	Sales	Percent of Total Sales
• Quick-service restaurants:	\$115 billion	70%
• Full-service restaurants:	\$ 20 billion	10%

80.2 Takeout and The American Lifestyle

In a recent survey by the National Restaurant Association (www.restaurant.org), 33% of adults said purchasing takeout from restaurants is an important part of the way they live. For frequent restaurant patrons, the percentage is even higher, as follows:

• Frequent full-service restaurant (FSR) customers:	44%
• Frequent quick-service restaurant (QSR) customers:	48%
• Frequent off-premises dinner (OPD) customers:	53%

The percentages of adults who say they are likely to use various off-premise options are as follows:

	All Adults	Frequent Customers		
		FSR	QSR	OPD
• Delivery from a full-service restaurant:	55%	58%	65%	68%
• Delivery from a quick-service restaurant:	52%	54%	61%	68%
• Takeout from a full-service restaurant:	51%	53%	59%	69%

80.3 The Takeout and Delivery Customer

According to Technomic (www.technomic.com), 57% of consumers purchase takeout once a week or more. Consumers use takeout and delivery monthly, by age demographic, as follows (source: Technomic; number of meal occasions):

	1 or 2	3 to 9	10 or more
• 18-to-24:	10%	49%	42%
• 25-to-34:	26%	47%	27%
• 35-to-44:	28%	52%	20%
• 45 and older:	29%	52%	19%

Consumers' preferences in takeout and delivery are as follows (source: Technomic; percentage of respondents):

- Drive-thru: 49%
- Home delivery: 45%
- Designated takeout parking spaces: 45%
- Dedicated takeout staff: 37%
- Online ordering: 35%
- Office delivery: 34%
- Curbside delivery: 31%

Takeout sales do not appear to significantly cannibalize dining room traffic. Technomic found that 60% of consumers who recently purchased takeout said if they had not done so on that occasion, they would most likely have made food at home and not purchased from a foodservice operator.

80.4 Pizza Delivery

Delivery services are credited as being a significant factor in the growth of major pizza chains. According to NPD, of the 1.6 billion food deliveries in 2012, 71% were pizza deliveries.

Seventy percent (70%) of Domino Pizza's business is delivery; the chain's annual sales are \$3.56 billion. Many small independent pizza restaurants, however, do not offer delivery services.

80.5 Quick-Service Carryout and Delivery

According to Sandelman & Associates (www.sandelman.com), drive-thru accounts for 41% of all fast-food occasions, carryout ordered inside the restaurant comprises 23%, and delivery comprises 6% for quick-service restaurants (QSRs). The other 30% are dine-in meals. By daypart, the percentage of customers who used carryout services on their last QSR purchase is as follows:

- Breakfast: 5%
- Lunch: 33%
- Dinner: 58%
- Snacks: 4%

Virtually all quick-service restaurants offer carryout; an increasing number are offering delivery service.

Burger King has tested home delivery at select locations in Maryland and Virginia. The operators of more than 300 franchised Subway restaurants in Washington, D.C., two McDonald's locations in New York City, and a San Francisco franchisee of Johnny Rockets have also tested or offer home delivery service.

80.6 Takeout At Full-Service Chains

According to the National Restaurant Association, nine in 10 family- and casual-dining operators and three-fourths of fine-dining operators offer takeout service. Thirty-seven percent (37%) of American adults have used curbside takeout from a full-service restaurant. Most full-service restaurants do not offer delivery. Among those that do, 40% find it to account for an increasing share of sales.

More than half of adults surveyed by the National Restaurant Association said they would be likely to use a curbside takeout option if offered by their favorite table-service restaurant. Fifty-eight percent (58%) of adult consumers said they would be likely to order food for delivery from their favorite table-service restaurant if provided with the option.

A recent survey by Technomic found 54% of respondents had ordered a meal from a full-service restaurant for off-premise consumption at least once during the preceding week; 17% had ordered twice. Nearly one in 10 had used a full-service restaurant as their meal source at least three times during the prior seven days.

80.7 Takeout for Offices and Elsewhere

Americans are increasingly eating takeout meals at work. According to The NPD Group, the average worker purchases 27 meals annually for consumption at the workplace, a 17% increase from 10 years ago.

Takeout food is not always for consumption at the office or home; over two-thirds of American consumers, at least occasionally, eat in their car. According to a survey by Kelton Research (www.keltonresearch.com), when asked how often they eat in their car, drivers responded as follows:

- At least once a day: 9%
- Once or twice a week: 14%
- Once a month: 14%
- Never: 31%
- Other response: 32%

80.8 Takeout Packaging

Packaging for takeout is important for environmental considerations as well as to maintain product integrity. In a survey by the National Restaurant Association, the following percentages of restaurant operators said they planned to upgrade takeout packaging in 2013:

	Better Quality	More Environmentally-Friendly
• Fine-dining:	47%	62%
• Casual-dining:	57%	57%
• Family-dining:	57%	47%
• Fast-casual:	75%	40%
• Quick-service:	71%	53%

Approximately 20% of restaurants said they planned to include information with takeout orders on proper food-handling techniques.

VALUE-FOCUSED DINING

81.1 Overview

Many consumers cut back dramatically on their dining-out occasions during the economic downturn. While the U.S. is considered to be well into recovery, consumers still are not returning to restaurants as much as before. Nearly 30% of American consumers say they intend to spend less on dining out in the year ahead, according to a new survey from AlixPartners (www.alixpartners.com).

“Diners, like most American consumers today, remain stuck in the limbo of today’s seemingly one-step-forward, one-step-back economy. In fact, one survey suggests that restaurants may be sufferings disproportionately from that phenomenon versus other types of businesses.”

Eric Dzwonczyk, Managing Director
AlixPartners
Nation’s Restaurant News, 3/14

Respondents to an AlixPartners survey said they expect to spend 9.1% less per restaurant meal in 2014, or about \$13.55, compared with the \$14.91 they said they spent in 2013 per meal. The percentage who dined out at least weekly dropped to 57% from 60% a year prior.

81.2 Trading Down

Based on the analysis of more than 250 million checks at full-service restaurants in 2012, GuestMetrics (www.guestmetrics.com) found that the number of entrées ordered declined by 1.5%, while orders of appetizers and sides grew by 2.8%. The average price of an entrée was \$11.56, compared with \$5.57 for appetizers and sides,

indicating downward pressure on average checks. The number of wine bottles ordered in restaurants and bars dropped 13%; the number of glasses of wine rose by 4%. Dessert sales rose by 2.3%.

“Restaurant customers traded down in 2012 – from entrées down to appetizers, from bottles of wine down to glasses, and from expensive entrées down to cheaper ones.”

Bill Pecoriello, CEO
GuestMetrics
Nation's Restaurant News, 1/22/13

Similarly, a survey of consumers who visit restaurants at least once per month by Consumer Edge Insight (www.consumeredgeinsight.com) found that consumers overall were cutting back on dining out and spending less in restaurants. The types of cutbacks were as follows (percentage of respondents):

- Traded down to less expensive dining options: 60%
- Order less expensive items on restaurant menus: 55%
- Take advantage of dining discounts or promotions: 51%

Among respondents who ate at quick-service restaurants, 26% said they ate at fine-dining restaurants less often, 23% ate less often at casual-dining concepts, and 15% cut back on fast-casual dining.

“Many consumers are trading down from fine-dining for economic reasons. But rather than taking the smaller step down to casual-dining, a lot are trading down to quick-service or pizza restaurants.”

David Decker, President
Consumer Edge Insight
Nation's Restaurant News, 1/22/13

81.3 Promotions

According to The NPD Group (www.npd.com), deal-driven traffic has been on a downward trend for at least four consecutive years. Deal-driven visits grew by 5% in 2008, slipped to 3% the following year, remained flat for 2010 and 2011, and dropped by 3% in 2012.

Combo meals, a concept introduced in the 1990s, peaked in popularity in 2008 when about nine billion combo meals were sold. During the period assessed by NPD, combo meals and value menu item offers contributed to the overall decline in deal traffic, with younger consumers turning away from those latter deals in particular.

Understanding Combo Meal Purchasing Behavior, a 2012 report by The NPD Group, attributed the declining popularity, in part, to consumers' interest in menu items that are not part of combo options. Survey respondents said their interest in combo meals would be enhanced with swappable combo-meal components, as follows:

	Would Change Item	Would Not Change Item	Would Not Include Item
• Main dish:	31%	63%	6%
• Side dish:	58%	36%	6%
• Beverage:	45%	44%	11%
• Dessert:	45%	30%	25%

Results from a separate NPD Group report found loyalty, by comparison, to be a bigger draw than deals and combos. Loyal quick-service restaurant (QSR) customers (who allocate 20% or more of their QSR visits to the chain) visit twice as often as QSR restaurant switchers (who allocate 19% or less of their visits). Loyal customers also tend to be less sensitive to price, require less marketing, and bring in other buyers.

81.4 Market Resources

AlixPartners, 300 N. LaSalle Drive, Suite 1900, Chicago, IL 60654. (312) 346-2500. (www.alixpartners.com)

Consumer Edge Insight, 1 Landmark Square, 9th Floor, Stamford, CT 06901. (203) 504-8122. (www.consumeredgeinsight.com)

GuestMetrics Inc., 1602 Village Market Boulevard SE, Leesburg, VA 20175. (703) 297-3400. (www.guestmetrics.com)

The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700. (www.npd.com)

PART X: BEVERAGE TRENDS & ANALYSES

BEVERAGE CONSUMPTION & SPENDING

82.1 Beverage Consumption

According to Beverage Marketing Corporation (www.beveragemarketing.com), the average person consumes 165.0 gallons of beverages annually. Consumption by beverage category is as follows:

- Carbonated soft drinks: 44.7 gallons
- Bottled water: 28.3 gallons
- Beer: 20.8 gallons
- Milk: 20.4 gallons
- Coffee: 18.5 gallons
- Fruit beverages: 11.5 gallons
- Tea: 10.3 gallons
- Sports beverages: 4.0 gallons
- Wine: 2.3 gallons
- Distilled spirits: 1.5 gallons
- Value-added water: 1.5 gallons
- Energy drinks: 1.2 gallons

People also consume approximately 25.0 gallons of tap water annually.

82.2 Beverage Spending

Consumers in the U.S. spend more than \$300 billion annually on beverage purchases. This includes alcoholic and nonalcoholic beverages, consumed both on-premise and at home.

According to the Distilled Spirits Council (DISCUS, www.discus.org), alcoholic beverage supplier gross revenue in 2013 was \$64.10 billion, distributed as follows (change from previous year in parenthesis):

- Beer: \$30.96 billion (2.1%)
- Spirits: \$22.25 billion (4.5%)
- Wine: \$10.89 billion (3.4%)

There has been a shift in alcoholic beverage spending over the past decade. Marketshare in 2013, and, for comparison, in 2003, was as follows:

	2003	2013
• Beer:	53.8%	48.3%
• Spirits:	30.0%	34.7%
• Wine:	16.2%	17.0%

According to The Beverage Information Group (www.beveragenet.net), annual on-premise alcoholic beverage sales are approximately \$110 billion.

The American Beverage Association (www.ameribev.org) estimates that Americans spend roughly \$100 billion annually on refreshment and nonalcoholic beverages. This category includes carbonated soft drinks, bottled water, juice and juice drinks, ready-to-drink tea and coffee, sports drinks, and energy drinks.

Consumers spend between \$12 billion and \$15 billion annually on hot coffee and specialty coffee beverages at coffeeshouses and quick-service restaurants, according to Technomic (www.technomic.com) and Business Trends Analysts (www.bta-ler.com).

82.3 Alcoholic Beverages

Among the 220 million legal drinking-age consumers in the United States (70% of the total population), about 100 million are identified as social drinkers.

According to the National Institutes of Health (www.nih.gov), when light drinkers – those who consume 12 or fewer drinks a year – are combined with nondrinkers, they represent nearly 49% of the U.S. population. Other estimates put the percentage as low as 25%.

The Gallup Organization (www.gallup.com) has conducted consumer polls related to alcohol and drinking since 1939. (Prohibition ended in 1933.) After fluctuating somewhat over the past several decades, the percentage of adults who drink alcoholic beverages has held relatively constant over the past several years. The following are results of various Gallup Polls:

	Drink	Total Abstainer
• 1939:	58%	42%
• 1949:	58%	42%
• 1959:	61%	39%
• 1969:	64%	36%
• 1979:	69%	31%
• 1989:	62%-56%*	38%-44%*
• 1999:	64%	36%
• 2000:	64%	36%
• 2001:	62%	38%
• 2002:	66%	34%
• 2003:	62%	38%
• 2004:	62%	38%
• 2005:	63%	37%
• 2006:	64%	36%
• 2007:	64%	36%

- 2008: 62% 38%
- 2009: 64% 36%
- 2010: 67% 33%
- 2011: 64% 35%
- 2012: 66% 34%
- 2013: 60% 39%

* Those using beverage alcohol declined from 62% in April 1989 to 56% in September 1989 due in large part to federal drug and alcohol awareness programs.

Among those who consume alcoholic beverages (2013), the following are the beverages most frequently consumed (source: Gallup):

- Beer: 36%
- Wine: 35%
- Spirits: 23%

The following is the distribution of those who drink alcoholic beverages (2013) by weekly consumption (source: Gallup):

- Less than one drink: 37%
- 1-to-7 drinks: 48%
- 8 or more drinks: 13%

Harris Poll (www.harrisinteractive.com) reports consumption of alcoholic beverages by adults as follows:

	Daily	At least once per Week	At least once a month	Less than once a month	Never
Gender					
• Female:	3%	21%	21%	33%	24%
• Male:	7%	38%	18%	24%	20%
Age					
• 21-to-34:	3%	33%	24%	21%	23%
• 35-to-46:	3%	30%	20%	32%	18%
• 47-to-65:	5%	29%	17%	31%	22%
• 66 and older:	11%	26%	18%	29%	27%
All	5%	29%	20%	29%	22%

Those who drink alcoholic beverages at least several times a year drink the following types of beverages (source: Harris Poll):

	All	Men	Women
• Beer:	63%	75%	50%
• Domestic wine:	54%	45%	63%
• Vodka:	41%	40%	43%
• Rum:	34%	34%	35%
• Imported wine:	28%	26%	31%

• Tequila:	28%	27%	30%
• Canadian/Irish/other whiskey:	20%	25%	14%
• Champagne:	17%	13%	23%
• Cordials and liqueurs:	17%	14%	20%
• Bourbon:	15%	23%	6%
• Gin:	14%	15%	13%
• Scotch:	11%	17%	4%
• Cognac:	8%	11%	4%
• Brandy:	7%	10%	5%
• Other:	6%	6%	7%

According to *What America Drinks*, by Environ International Corporation (www.environcorp.com), the percentages of various demographics that consume alcoholic beverages and average daily consumption are as follows:

	Consumers	Avg. Consumption
• Male, ages 19-to-49:	34.1%	14.7 fl. oz.
• Male, ages 50 and older:	31.5%	9.1 fl. oz.
• Female, ages 19-to-49:	20.6%	4.5 fl. oz.
• Female, ages 50 and older:	16.0%	2.3 fl. oz.

Note: Percentages indicate those who consumed a beverage on the day of survey or day of recall.

Rankings of per capita consumption of the three beverage alcohol categories are summarized as follows (Source: National Institute of Health. Note: #1 ranking indicates state has highest per capita consumption for each beverage):

		Beer	Wine	Distilled Spirits
1	New Hampshire:	# 2	# 2	# 1
2	District of Columbia:	#14	# 1	# 2
3	Nevada:	# 1	# 4	# 3
4	Delaware:	#17	# 5	# 4
5	Wyoming:	# 3	#33	# 6
6	Wisconsin:	# 6	#25	# 5
7	Florida:	#22	#14	# 9
8	Colorado:	#19	#16	# 8
9	Montana:	# 4	#23	#23
10	North Dakota:	# 5	#42	# 9
11 (tie)	Massachusetts:	#41	# 5	#11
11 (tie)	Arizona:	#13	#19	#24
13	Vermont:	#22	# 8	#32
14	Alaska:	#25	#19	#12
15	Rhode Island:	#39	# 8	#12
16	Minnesota:	#30	#25	# 6
17 (tie)	South Dakota:	# 8	#44	#19
17 (tie)	New Mexico:	# 6	#27	#36
19 (tie)	Hawaii:	#24	#15	#28

19 (tie)	Louisiana:	#11	#32	#19
21	Maine:	#28	#18	#19
22 (tie)	South Carolina:	#16	#33	#17
22 (tie)	Oregon:	#32	#12	#26
24	Illinois:	#27	#22	#17
25	Idaho:	#37	# 3	#41
26	Missouri:	#20	#31	#26
27	New Jersey:	#48	#11	#12
28	Nebraska:	#11	#40	#34
29 (tie)	Connecticut:	#49	# 7	#15
29 (tie)	California:	#42	#10	#31
31	Pennsylvania:	# 9	#33	#47
32 (tie)	Washington:	#45	#13	#28
32 (tie)	Texas:	# 9	#33	#47
34	Mississippi:	#14	#50	#35
35	Michigan:	#35	#29	#25
36 (tie)	Georgia:	#33	#29	#30
36 (tie)	Maryland:	#47	#24	#15
38	Iowa:	#17	#45	#42
39 (tie)	Virginia:	#37	#21	#42
39 (tie)	Ohio:	#20	#37	#49
41	North Carolina:	#30	#27	#44
42 (tie)	Indiana:	#40	#38	#32
42 (tie)	Tennessee:	#26	#40	#44
44 (tie)	New York:	#49	#16	#36
44 (tie)	Oklahoma:	#42	#49	#19
46	Alabama:	#34	#39	#44
47	Kansas:	#36	#42	#38
48	Arkansas:	#42	#48	#38
49	Kentucky:	#46	#45	#38
50	West Virginia:	#29	#51	#51
51	Utah:	#51	#45	#50

Note: Overall ranking based on consumption volumes adjusted for average relative alcohol content of beer, wine, and distilled spirits.

There are two main drivers in the overall beverage alcohol market, according to Beverage Marketing Corporation: the economy and the weather. When gross domestic product goes up, people drink more beer, distilled spirits, and wine. When weather is bad, people drink more wine and spirits, but less beer.

One trend in the alcoholic beverage sector is American-made beverages entering the global marketplace, with many considered to be among the finest in the world. This has not always been the case. Just a quarter century ago, for example, only imported wine (generally of French vintage) was thought to be of great quality. Now, American wines regularly win international awards and appear on tables in fine

restaurants. And American beer and bourbon are closing their respective gaps in the beverage world.

Still, the U.S. market continues to see a strong presence of imported brands. Overseas suppliers generally eclipse domestic producers in offering new premium brands. According to Beverage Marketing Corporation, 40% of spirits in the U.S. market are imports, as are 26% of wines and 14% of beer.

82.4 Nonalcoholic Beverages

According to *What America Drinks*, the percentages of demographics consuming various types of nonalcoholic beverages are as follows:

	CSD	Coffee	Tea	Juice	Milk
• Male and female, ages 4-to-8:	45.2%	1.0%	1.4%	37.3%	74.3%
• Male, ages 9-to-13:	66.6%	2.4%	2.7%	30.6%	64.8%
• Male, ages 14-to-18:	74.7%	3.1%	4.1%	26.5%	55.2%
• Male, ages 19-to-49:	58.5%	39.7%	10.7%	22.2%	37.4%
• Male, ages 50 and older:	35.1%	71.3%	17.3%	35.5%	45.3%
• Female, ages 9-to-13:	60.5%	1.1%	4.8%	30.7%	59.9%
• Female, ages 14-to-18:	67.0%	5.0%	5.9%	26.7%	43.5%
• Female, ages 19-to-49:	51.0%	38.7%	14.2%	23.4%	32.5%
• Female, ages 50 and older:	25.9%	67.9%	22.8%	34.3%	44.7%

Notes: Percentages indicate those who consumed a beverage on the day of survey or day of recall.

CSD = carbonated soft drinks. Juice includes fruit and vegetable juices but not fruit drinks. Milk includes only plain milk, not flavored milk.

According to Beverage Marketing Corporation, the overall U.S. liquid refreshment beverage market, which includes all nonalcoholic beverages except tap water, increased 1.0% in 2012. This followed an increases of 0.9% and 1.3%, respectively, in 2011 and 2010.

BEER

83.1 Market Assessment

The Brewers Association (www.brewersassociation.org) estimates U.S. beer sales in 2012 at \$99 billion, a 3.1% increase from a year prior. In 2012, 200.03 million barrels of beer were sold. (Note: one case = 2.25 gallons; one barrel = 31.0 gallons (117.3 liters); one barrel = 13.7 cases)

Beer supplier gross revenue has been as follows (source: Distilled Spirits Council of the United States [www.discus.org]; change from previous year in parenthesis):

- 2003: \$24.87 billion (2.9%)
- 2004: \$25.62 billion (3.2%)
- 2005: \$25.62 billion (no change)
- 2006: \$26.34 billion (2.7%)
- 2007: \$27.59 billion (4.6%)
- 2008: \$28.56 billion (3.6%)
- 2009: \$28.82 billion (1.1%)
- 2010: \$28.64 billion (-0.7%)
- 2011: \$29.24 billion (2.2%)
- 2012: \$30.32 billion (3.7%)
- 2013: \$31.96 billion (5.4%)

“The beer market may be back to pre-recession, low-single digit growth, but it’s not at pre-recession volume levels. The peak was in 2008, the year the bottom fell out.”

Beverage World, 5/13

According to IRI (www.iriworldwide.com), beer sales in supermarkets, drug stores, and mass merchandisers for the 12-month period ending October 6, 2013 were \$13.39 billion, a 5.2% increase over the prior year.

According to *Beer Handbook 2013*, published by the Beverage Information

Group (www.bevinfogroup.com), the U.S. beer market was distributed by category in 2012 as follows (change from previous year in parenthesis):

- Light: 51.7% (-0.2%)
- Premium & super premium: 12.3% (-3.1%)
- Popular: 7.7% (-1.2%)
- Craft: 7.3% (14.6%)
- Ice: 3.6% (-1.2%)
- Malt liquor: 2.3% (-3.0%)
- Flavored malt beverages: 1.7% (7.8%)

Domestic beer accounts for 86.7% of beer consumption.

It is estimated that more than 3,500 brands of beer – supplied by more than 2,000 brewers and importers – are available in the U.S.

According to the Brewers Association, 2,196 breweries were in operation in the U.S. as of June 2013, an increase from 2,196 a year prior. The distribution in 2013 was as follows:

- Large breweries: 24
- Regional non-craft breweries: 31
- Regional craft breweries: 97
- Microbreweries: 1,221
- Brewpubs: 1,165

According to the Beer Institute (www.beerinstitute.org), the package mix of beer sold is as follows:

- Cans: 48%
- One way bottles: 42%
- Draught: 9%
- Refills/plastic/other: 1%

83.2 Market Leaders

According to *Beer Handbook 2013*, beer marketshare is distributed as follows:

- Anheuser-Busch/InBev: 48.0%
- MillerCoors: 29.0%
- Crown Imports: 5.9%
- Heineken USA: 4.1%
- Pabst Brewing Company: 2.8%
- Others: 10.2%

83.3 Top Domestic Beer Brands

According to The Beverage Information Group, the leading domestic beer brands ranked by sales in 2012 are as follows (change from previous year in parenthesis):

- Bud Light (Anheuser-Busch/InBev): 532.6 million cases (-1.0%)
- Coors Light (MillerCoors): 259.0 million cases (2.0%)
- Budweiser (Anheuser-Busch/InBev): 226.3 million cases (-6.5%)
- Miller Lite (MillerCoors): 202.2 million cases (-4.2%)
- Natural Light (Anheuser-Busch/InBev): 111.4 million cases (-5.1%)
- Busch Light (Anheuser-Busch/InBev): 90.8 million cases (-0.5%)
- Busch (Anheuser-Busch/InBev): 76.7 million cases (-5.4%)
- Miller High Life (MillerCoors): 61.0 million cases (-6.2%)
- Keystone Light (MillerCoors): 57.7 million cases (-8.1%)
- Michelob Ultra (Anheuser-Busch/InBev): 46.9 million cases (7.0%)

* cases are 2.25 gallons

“For the past decade, the top-ten list of domestic beers has been remarkably consistent, and membership in the top five unchanged.”

Beverage Dynamics, 9/13

83.4 Demographics

The following is a demographic profile of the beer consumer (source: *Behavioral Tracking Study*, Miller Brewing Company):

Gender

- Male: 77%
- Female: 23%

Age

- 21-to-27: 23%
- 28-to-34: 18%
- 35-to-44: 26%
- Age 45 and older: 34%

Income

- Less than \$30,000: 32%
- \$40,000 to \$49,999: 23%
- More than \$50,000: 45%

Ethnicity

- African-American: 12%

- Caucasian: 74%
- Hispanic: 11%
- Other: 3%

There is a significant gender variation in where beer is purchased. The following is the gender profile of beer purchases at various outlets:

	Male	Female
• On-premise:	78%	22%
• Convenience stores:	74%	26%
• Supermarket:	68%	32%
• Liquor store:	74%	26%

Surveys by International Demographics (www.themediiaaudit.com) found that between 2008 and 2012 there was a 5.4% increase in the percentage of women who frequently consume beer. Frequent beer consumption is defined by International Demographics as having consumed beer on six or more occasions in the past two weeks; 5.9% of U.S. adults are classified in this category. Among frequent beer drinkers, 19.6% are female, compared to 18.6% in 2008.

Among top markets for females who frequently drink beer are Greensboro, North Carolina, where 7.2% of the female population frequently consume beer, followed by Akron, Ohio (5.9%), Boise, Idaho (4.7%), Allentown-Bethlehem, Pennsylvania (4.6%), and Eugene, Oregon (4.3%).

83.5 Craft Beer

Craft beers, which are defined as those with annual production under two million barrels, are typically made by small, independent breweries and feature traditional ingredients such as malted barley. In some cases, nontraditional ingredients such as chocolate or raspberries are added for distinctiveness.

Small craft breweries have flourished in the U.S. in recent years. The trend began in 1979 when federal legislation repealed restrictions on the home-brewing of small quantities of beer. At that time there were 42 breweries in the U.S.; as of June 2013 there were 2,483, according to the Brewers Association.

According to the Brewers Association, retail sales of craft beer in 2012 were \$10.2 billion, with 13.24 million barrels sold, increases of 17% and 15%, respectively, over the previous year. The craft brewing sales share in 2012 was 6.6% by volume and 10.2% by dollars.

According to Beverage Marketing Corporation and *Beverage World*, the leading craft brewers in 2012 were as follows:

• Boston Beer Co. (Boston, MA):	2.70 million cases
• Sierra Nevada Brewing Co. (Chico, CA):	970,000 cases
• New Belgium Brewing Co. (Fort Collins, CO):	764,000 cases
• The Gambrinus Co. (San Antonio, TX):	594,000 cases
• Deschutes Brewery (Bend, OR):	252,000 cases

- Lagunitas Brewing Co. (Petaluma, CA): 235,000 cases
- Bell's Brewery (Galesburg, MI): 216,000 cases
- Matt Brewing Co. (Utica, NY): 202,000 cases
- Harpoon Brewery (Boston, MA): 192,000 cases
- Stone Brewing (Escondido, CA): 177,000 cases

Cheers OnTrac Study 2013 reported the top selling craft beer brands in bars and restaurants, ranked by marketshare, as follows:

- Samuel Adams: 30.1%
- Blue Moon: 28.2%
- Sierra Nevada: 6.9%
- Sam Adams Seasonal: 6.4%
- Lagunitas: 1.4%
- Shock Tip: 1.3%
- Dogfish Head: 1.2%
- Summit: 1.0%
- Anchor Steam: 0.7%
- Fat Tire: 0.7%

One of the major drivers of the craft beer market is consumers' increasing preference for foods and beverages that are locally sourced.

Restaurants are also embracing the craft beer movement, with some hosting beer tastings and staffing beer sommeliers to assist diners in choosing the right match for their meals.

83.6 Imported Beer

By volume, imported beer consumption increased 1.5% in 2012, to 373.1 million cases. This followed 1.9% and 0.9% increases, respectively, in 2011 and 2010.

According to The Beverage Information Group, the leading imported beer brands in 2012 were as follows (change from previous year in parenthesis):

- Corona Extra (Crown Imports): 100.7 million cases (2.0%)
- Heinekin (Heineken USA): 55.2 million cases (1.4%)
- Modelo Especial (Crown Imports): 42.4 million cases (20.6%)
- Dos Equis (Heineken USA): 18.7 million cases (16.0%)
- Stella Artois (Anheuser-Busch/InBev): 17.1 million cases (18.0%)
- Tecate (Heineken USA): 15.8 million cases (-2.0%)
- Corona Light (Crown Imports): 13.5 million cases (2.4%)
- Guinness Stout (Diageo-Guinness): 12.2 million cases (-2.0%)
- Labatt Blue (North American Breweries): 9.9 million cases (-5.0%)
- Newcastle Brown Ale (Heineken USA): 7.2 million cases (3.0%)

* cases are 2.25 gallons

83.7 Flavored Malt Beverages

Flavored malt beverage consumption increased 7.8% to 5.4 million barrels in 2012, according to Beverage Marketing Corporation. This followed 11.1% and 7.1% increases, respectively, in 2011 and 2010.

“There’s a bit of a mini-renaissance going on with flavored malt beverages, thanks to innovation and a strong marketing push by Mike’s Lemonade.”

Beverage World

83.8 Cider

Long popular in the U.K., the U.S. market for hard cider, or fermented cider, is experiencing strong growth. According to IRI, retail sales of cider increased 84.6% to \$105.6 million in 2012; volume sales increased 81.3% to 3.03 million cases.

“You could call it the overnight sensation that took its sweet [no pun intended] old time to manifest – you could even say centuries when you consider they were making the stuff on U.S. soil before it even was U.S. soil. But now it appears that cider, a relatively mature category in the United Kingdom and Ireland, could be finally having its big moment in the U.S.”

Beverage World, 5/13

- Ranked by retail sales, the following are the leading cider brands (source: IRI):
- Woodchuck (Vermont Hard Cider Co.): \$30.6 million
 - Angry Orchard (Boston Beer Co.): \$24.8 million

- Hornsby's (C&C Group): \$14.0 million
- Michelob Cider (Anheuser-Busch InBev): \$ 6.0 million
- Strongbow (Heineken USA): \$ 5.4 million
- Crispin (MillerCoors): \$ 4.5 million
- Wyders (Vermont Hard Cider Co.): \$ 1.9 million

83.9 On-Premise

While on-premise sales represent only 25% of volume consumption, they account for 50% of total dollar spending.

According to the *Behavioral Tracking Study*, by Miller Brewing Company, on-premise beer consumption is distributed as follows:

- Bar/tavern/pub: 62%
- Restaurant: 20%
- Hotel: 7%
- Concessions: 6%
- Country club: 3%
- Bowling center: 2%

According to The NPD Group (www.npd.com), beer accounts for 54% of alcoholic beverages served in bars and 50% of servings at casual-dining restaurants.

83.10 Market Resources

Beer Institute, 122 C Street NW, Suite 350, Washington, DC 20001. (202) 737-2337. (www.beerinstitute.org)

Beverage Information Group, 17 High Street, 2nd Floor, Norwalk, CT 06851. (203) 855-8499. (www.bevinfogroup.com)

Beverage Marketing Corporation, 850 Third Avenue, New York, NY 10022. (212) 826-1255. (www.beveragemarketing.com)

Brewers Association, 736 Pearl Street, Boulder, CO 80302. (303) 447-0816. (www.brewersassociation.org)

IRI, 150 North Clinton Street, Chicago, IL 60661. (312) 726-1221. (www.infores.com)

DISTILLED SPIRITS

84.1 Market Assessment

The Distilled Spirits Council of the United States (DISCUS, www.discus.org) provides the following assessment of the U.S. market for distilled spirits:

- | | |
|-------------------------|-------------------------|
| • 2003: \$13.87 billion | • 2009: \$18.74 billion |
| • 2004: \$15.12 billion | • 2010: \$19.16 billion |
| • 2005: \$16.00 billion | • 2011: \$20.36 billion |
| • 2006: \$17.20 billion | • 2012: \$21.29 billion |
| • 2007: \$18.20 billion | • 2013: \$22.25 billion |
| • 2008: \$18.72 billion | |

Shipments and revenue of distilled spirits in 2013, by category, were as follows (change from previous year in parenthesis):

	Volume	Revenue
• Total:	205.77 million cases* (1.9%)	\$22.25 billion (4.5%)
• Whiskey:	52.76 million cases (6.2%)	\$ 7.01 billion (10.1%)
• Vodka:	65.87 million cases (1.1%)	\$ 5.59 billion (2.2%)
• Rum:	25.57 million cases (0.3%)	\$ 2.39 billion (3.3%)
• Tequila:	13.13 million cases (6.6%)	\$ 2.03 billion (7.9%)
• Gin:	10.32 million cases (-3.8%)	\$ 866 million (-0.6%)
• Brandy & Cognac:	11.12 million cases (1.2%)	\$ 1.55 billion (2.1%)
• Cordials:	20.64 million cases (0.5%)	\$ 2.46 billion (-2.4%)
• Cocktails:	6.34 million cases (1.3%)	\$ 353 million (1.1%)

Shipments and revenue of distilled spirits in 2013, by tier, were as follows (change from previous year in parenthesis):

	Volume	Revenue
• Total:	205.77 million cases* (1.9%)	\$22.25 billion (-0.4%)
• Value tier:	75.98 million cases (-1.2%)	\$ 4.06 billion (1.9%)
• Premium tier:	74.00 million cases (1.6%)	\$ 7.45 billion (8.7%)
• High-end premium tier:	38.90 million cases (7.2%)	\$ 6.52 billion (8.2%)
• Super premium tier:	16.89 million cases (6.3%)	\$ 4.22 billion (4.5%)

* 9-liter case equivalents

84.2 Major Brands

By category, the following are major distilled spirits brands (source: DISCUS):

Whiskey: Canadian Blends

- Value: Black Velvet, Kessler, Lord Calvert
- Premium: Canadian Club, Seagram 7, Seagrams VO
- High end premium: Canadian Club 12 Year, Seagrams VO Gold,
- Super premium: Crown Royal

Whiskey: Bourbon, Tennessee, Rye, Corn Whiskey

- Value: Bellows, Early Times, Old Crow
- Premium: Erza Brooks, George Dickel, Jim Beam White, Old Forrester
- High end premium: Jack Daniels, Jim Beam Black, Makers Mark, Wild Turkey
- Super premium: Knob Creek, Jack Daniels Single Barrel, Woodford Reserve

Scotch Whisky

- Value: Bellows, Passport, Scorsby
- Premium: Dewars White Label, Johnnie Walker Red
- High end premium: Chivas Regal, Dewars 12, Glenlivet 12, Johnnie Walker Black
- Super premium: Chivas 18, Johnnie Walker Blue, Glenlivet, Glenmorangie, Macallan

Irish Whiskey

- High end premium: Bushmills, John Jameson, Michael Collins
- Super premium: Black Bush, Jameson 12

Vodka

- Value: Gilbey, Kamchatka, Popov, Wolfschmidt
- Premium: Pearl, Pinnacle, Skyy, Smirnoff, Svedka
- High end premium: Absolut, American Harvest, Effen, Finlandia
- Super premium: Belvedere, Cîroc, Grey Goose, Zyr

Rum

- Value: Arrow, Castillo, James Harbor, Ronrico
- Premium: Bacardi Superior, Capt. Morgan Original, Malibu
- High end premium: 10 Cane, Bacardi 8, Cruzan Single Barrel, Mount Gay Black,
- Super premium: Mount Gay XO, Pyrat XO, Ron Zacapa XO

Tequila

- Value: Juarez, Gomez, Pepe Lopez, Sauza Lopez
- Premium: El Jimador Blanco, José Cuervo Especial, Sauza Blanco
- High end premium: Cazadores Blanco, El Jimador, El Mayor Anejo, Sauza Horintos
- Super premium: Cabo Wabo, Don Julio, Herradura, Patrón, Sauza Tres Generaciones

Gin

- Value: Dimitri, Gilbey's, Gordon's, Seagrams
- Premium: Beefeater, Bombay Original
- High end premium: Beefeater 24, Bombay Sapphire, Tanqueray
- Super premium: Plymouth, Oxley, Tanqueray 10

Brandy & Cognac

- Value: Dekyper Brandy, James Cardin Brandy, Leroux Brandy, Paul Masson Grande Amber 3Y
- Premium: Paul Masson Grande Amber 5Y, Presidente, Salignac VS
- High end premium: Courvoisier VS, Hennessy VS, James Cardin VSOP, Martell VS
- Super premium: Hennessy VSOP, Rémy Martin VSOP, most XOs

Cordials

- Value: Arrow, Dekuyper, Hiram Walker
- Premium: Baileys, Jägermeister, Kahlua, Southern Comfort
- High end premium: Chambord, Cointreau, Drambuie, Grand Marnier
- Super premium: Grand Marnier Centenaire

Cocktails

- Value: Arrow, Club, Fridays, Salvadors
- Premium: Bacardi Cocktails, Cuervo Margaritas, Jack Daniels Country Coolers, Kahlua RTDs, Malibu Codktails, Skinny Girl, Smirnoff Cocktails

84.3 Whiskey

Whiskey is an all-encompassing term for any distilled liquor made from a fermented mash of grain. Although all whiskey is distilled in a similar manner, each variety tastes quite different.

Federal regulations specify that whiskey must be produced at less than 190 proof and bottled at not less than 80 proof.

Whiskey is produced in many parts of the world; however, the only significant whiskeys found within the U.S. market are those produced in Scotland, Ireland, Canada, and the United States. Whisky (no 'e') typically refers to Scottish and Canadian whisky, whereas whiskey (with an 'e') is mostly used to denote Irish or American brands.

Whiskey shipments and revenue by tier in 2013 were as follows (source: DISCUS, change from previous year in parenthesis):

	Volume	Revenue
• Total:	49.66 million cases*	\$6.37 billion (6.8%)
• Value tier:	16.76 million cases	\$ 927 million (-0.4%)
• Premium tier:	13.21 million cases	\$1.43 billion (2.4%)
• High-end premium tier:	13.34 million cases	\$2.58 billion (9.1%)
• Super premium tier:	6.35 million cases	\$1.44 billion (12.8%)

* 9-liter case equivalents

Shipments and revenue by category in 2013 were as follows:

	Volume	Revenue
• Blended whiskey:	6.13 million cases* (14.3%)	\$ 387 million (18.2%)
• Bourbon & Tennessee:	18.03 million cases (6.8%)	\$2.45 billion (10.2%)
• Canadian:	16.49 million cases (2.9%)	\$1.70 billion (6.1%)
• Scotch - blended:	7.79 million cases (2.0%)	\$1.39 billion (7.6%)
• Scotch - single malt:	1.77 million cases (11.6%)	\$ 590 million (14.7%)
• Irish:	2.54 million cases (17.5%)	\$ 500 million (20.5%)

* 9-liter case equivalents

The following are the leading brands of American bourbon and whiskey in the U.S., ranked by number of cases shipped in 2012 (source: *Liquor Handbook 2013*, published by The Beverage Information Group [www.beveragenet.net], change from previous year in parenthesis):

American Bourbon and Straight Whiskey

- Jack Daniel's: 4.82 million cases* (3.1%)
- Jim Beam: 3.15 million cases (1.4%)
- Evan Williams: 1.43 million cases (6.0%)
- Makers Mark: 1.18 million cases (14.4%)
- Early Times: 546,000 cases (-1.9%)
- Wild Turkey: 536,000 cases (2.7%)
- Ten High: 448,000 cases (-0.4%)
- Old Crow: 434,000 cases (-0.2%)
- Ancient Age/AAA: 360,000 cases (-2.7%)
- Red Stag by Jim Beam: 251,000 cases (35.9%)

* 9-liter case equivalents

“Bourbon and American Straight Whiskey continues to approach consumers with more and better alternatives. Part of what has driven sales higher has been consumer thirst for the generally more expensive line extensions and more aged expressions from Kentucky.”

Beverage Dynamics, 9/13

Canadian Whisky

- Crown Royal: 4.16 million cases* (3.2%)
- Black Velvet: 1.94 million cases (2.9%)
- Canadian Mist: 1.59 million cases (-2.3%)
- Canadian Club: 1.18 million cases (-0.9%)
- Windsor Supreme: 923,000 cases (-0.1%)
- Seagram's V.O.: 890,000 cases (-5.8%)
- Rich & Rare: 815,000 cases (2.5%)
- Canadian LTD: 702,000 cases (-0.4%)
- Lord Calvert: 411,000 cases (-6.2%)
- Canadian Hunter: 375,000 cases (4.0%)

* 9-liter case equivalents

“Americans’ fascination with – and predilection for – brown spirits continues to accelerate. With clamored-for flavored expansions and craft newcomers, spirits from the Great White North are sought after now more than ever before.”

Beverage Dynamics, 1/14

Irish Whiskey

- Jameson: 1.61 million cases*(20.4%)
- Bushmills: 220,000 cases (15.8%)
- Tullamore Dew: 95,000 cases (20.3%)

* 9-liter case equivalents

“That Irish whiskey chalked up yet another record-breaking year is no longer breaking news, but rather, business as usual for the fastest-growing spirits category.”

Beverage Dynamics, 1/14

Scotch Whisky

- House of Dewar's: 1.20 million cases* (2.5%)
- Johnnie Walker Black: 835,000 cases (3.1%)
- Johnnie Walker Red: 705,000 cases (no change)
- Clan MacGregor: 508,000 cases (-5.9%)
- Chivas Regal: 393,000 cases (-1.0%)
- The Glenlivet: 356,000 cases (7.6%)

* 9-liter case equivalents

“While blended Scotch comprises the majority of sales in the U.S., single malt sales are growing by double-digit percentages, driven by new, exciting expressions.”

Beverage Dynamics, 3/13

84.4 Vodka

Vodka shipments in 2013 were as follows (source: DISCUS, change from previous year in parenthesis):

	Volume	Revenue
• Total:	65.87 million cases* (1.1%)	\$5.59 billion (2.2%)
• Value tier:	26.40 million cases (-0.6%)	\$1.09 billion (0.2%)
• Premium tier:	20.30 million cases (2.4%)	\$1.55 billion (3.2%)
• High-end premium tier:	12.94 million cases (3.2%)	\$1.68 billion (5.0%)
• Super premium tier:	6.23 million cases (-0.4%)	\$1.27 billion (-0.6%)

* 9-liter case equivalents

The following are the leading brands of vodka in the U.S., ranked by number of cases shipped in 2012 (source: The Beverage Information Group; change from previous year in parenthesis):

- Smirnoff: 9.88 million cases* (2.0%)
- Absolut: 4.67 million cases (2.0%)
- Svedka: 3.82 million cases (3.7%)
- Grey Goose: 3.45 million cases (0.5%)
- Pinnacle: 3.20 million cases (18.5%)
- Skyy: 2.80 million cases (1.9%)
- Ketel One: 2.11 million cases (4.7%)
- McCormick: 2.10 million cases (4.0%)

- Burnett's: 2.04 million cases (10.2%)
- Barton: 2.02 million cases (4.7%)

* 9-liter case equivalents

Vodka continues to be the most popular liquor in the United States, accounting for one out of every three bottles of distilled spirits sold. Lacking aroma, taste, and color, vodka is distilled at a high proof that extracts all of the congeners, or the natural compounds, in the distillate that give the product its taste and aroma. Because vodka is highly neutral, it is possible to make it from a mash of the cheapest and most readily available raw ingredients. Although traditionally made from potatoes, vodka is now generally produced from cereal grains, including rye, wheat, and barley, but mostly corn.

The market for vodka in the U.S. has been one the hottest among all alcoholic beverage segments over the past few years. While the entire distilled beverage category has increased marketshare among alcoholic beverages, sales of vodka have grown even faster.

“Vodka has become the backbone of the spirits industry, accounting for 32% of all volumes. An important growth driver has been the continued popularity of flavored vodkas. Flavored vodkas now account for around 24% of all vodkas sold.”

DISCUS, 2/14

84.5 Rum

Rum shipments and revenue in 2013 were as follows (source: DISCUS, change from previous year in parenthesis):

	Volume	Revenue
• Total:	25.57 million cases* (0.3%)	\$2.39 billion (3.3%)
• Value tier:	5.80 million cases (-2.8%)	\$ 286 million (-2.0%)
• Premium tier:	16.24 million cases (-0.9%)	\$1.63 billion (2.0%)
• High-end premium tier:	3.13 million cases (13.0%)	\$ 377 million (13.3%)
• Super premium tier:	407,000 cases (5.4%)	\$ 103 million (5.1%)

* 9-liter case equivalents

The following are the leading brands of rum in the U.S., ranked by number of cases shipped in 2012 (source: The Beverage Information Group, change from previous year in parenthesis):

- Bacardi: 9.54 million cases* (0.5%)
- Captain Morgan: 5.58 million cases (1.2%)
- Malibu: 1.78 million cases (2.1%)
- Castilio: 849,000 cases (-4.0%)
- Admiral Nelson: 800,000 cases (10.3%)
- Cruzan: 782,000 cases (7.9%)
- Sailor Jerry: 734,000 cases (10.0%)
- Parrot Bay: 532,000 cases (-2.4%)
- Ronrico: 420,000 cases (-0.5%)
- Calico Jack: 350,000 cases (16.7%)

* 9-liter case equivalents

A favorite American spirit long before bourbon whiskey, rum is a sweet, distilled spirit made from sugar cane. Although debate continues as to where rum was first produced, by the late seventeenth century the liquor was being distilled in the American colonies using molasses from the West Indies.

By federal law, rum must be distilled from the fermented juice of sugar cane, sugar cane syrup, sugar cane molasses, or other sugar cane byproducts at less than 190 proof. It can be made anywhere, although more than 80% of rum is produced in Puerto Rico. The two main types of rum are light-bodied rums, which have a dry, subtle flavor, and full-bodied rums, a more aromatic variety.

Growth in rum sales are driven largely by increasing popularity of the Mojito, a traditional Cuban cocktail that came into vogue in the U.S. during the late 1980s, along with other rum cocktails.

“The rum category features a wide variety of offerings, with spiced and flavored leading the way.”

Beverage Dynamics, 7/13

84.6 Tequila

Tequila shipments and revenue in 2013 were as follows (source: DISCUS, change from previous year in parenthesis):

	Volume	Revenue
• Total:	13.13 million cases* (6.6%)	\$2.03 billion (7.9%)
• Value tier:	2.87 million cases (-0.4%)	\$ 221 million (-0.1%)
• Premium tier:	7.03 million cases (9.2%)	\$ 818 million (9.2%)

- High-end premium tier: 1.16 million cases (4.0%) \$ 213 million (3.7%)
 - Super premium tier: 2.08 million cases (9.8%) \$ 779 million (10.2%)
- * 9-liter case equivalents

The following are the leading brands of tequila in the U.S., ranked by number of cases shipped in 2012 (source: The Beverage Information Group, change from previous year in parenthesis):

- José Cuervo: 3.13 million cases* (-4.6%)
- Patrón: 2.00 million cases (6.7%)
- Sauza: 1.80 million cases (3.3%)
- 1800: 925,000 cases (14.9%)
- Juárez: 810,000 cases (1.8%)
- Montezuma: 560,000 cases (1.8%)

* 9-liter case equivalents^{4.3}

Tequila boasts a uniquely exotic provenance that must be certified by the Mexican government's Tequila Regulatory Council (Consejo Regulador del Tequila; www.crt.org.mx). Just as Champagne can come only from the eponymous region in France, authentic tequila must hail from the area around the town of Tequila, in the state of Jalisco. Likewise, it must be made from the blue agave plant. Premium tequilas are 100% blue agave. Blended tequilas, known as mixtos, must contain at least 51% blue agave with the balance coming from sugar cane or maize.

Although tequila originated as a peasant drink, it now often commands prices higher than those of many Scotches and vodkas, with certain specialty brands ranging from \$40 a bottle up to \$2,000 a bottle.

“Fresh-tasting. Light. Versatility and mixability. More than just shots. These characteristics have helped the tequila category evolve into what it is today. There is a sophistication toward the category that did not exist a decade ago.”

Beverage Dynamics, 5/13

84.7 Gin

Gin shipments and revenue in 2013 were as follows (source: DISCUS):

	Volume	Revenue
• Total:	10.32 million cases* (-3.8%)	\$866 million (-0.6%)
• Value tier:	6.86 million cases (-6.9%)	\$408 million (-5.9%)
• Premium tier:	1.13 million cases (-0.7%)	\$130 million (1.0%)
• High-end premium tier:	2.26 million cases (5.0%)	\$315 million (6.3%)
• Super premium tier:	78,000 cases (-1.7%)	\$ 13 million (no change)

* 9-liter case equivalents

The following are the leading brands of gin in the U.S., ranked by number of cases shipped (source: The Beverage Information Group, change from previous year in parenthesis):

- Seagram's Gin: 2.36 million cases* (-5.1%)
- Tanqueray: 1.26 million cases (-2.3%)
- Bombay Sapphire: 818,000 cases (1.0%)
- Gordon's: 790,000 cases (-1.3%)
- New Amsterdam: 750,000 cases (-7.4%)
- Beefeater: 510,000 cases (-0.2%)
- Gilbey's: 418,000 cases (-3.5%)

* 9-liter case equivalents

Gin is a flavored spirit. Without the flavoring, it would be vodka. Aging is not a factor with gin, although U.S. producers sometimes age their gins, imparting a pale, golden color. Each gin achieves its distinct taste through the distiller's specific combination of gin botanicals, such as cassia, anise, coriander, angelica, and juniper.

“The gin category broadened a few years ago with the introduction of gins that do not have the traditional strong juniper flavors. Newer gin offerings that are less reliant on juniper give bartenders more options. This allows the gins to play easier with other spirits in mixing, due to the softer nuances of their botanical choices.”

Mike Hanley, Beverage Director
Tavistock Restaurants
Cheers, 1/13

84.8 Market Resources

Beverage Information Group, 17 High Street, 2nd Floor, Norwalk, CT 06851.
(203) 855-8499. (www.beveragenet.net)

Distilled Spirits Council of the United States, 1250 Eye Street NW, Suite 400,
Washington, DC 20005. (202) 628-3544. (www.discus.org)

WINE

85.1 Market Assessment

Wine consumption in the U.S. has been as follows (source: Beverage Marketing Corporation [www.beveragemarketing.com]; change from previous year in parenthesis):

- 2002: 583.8 million gallons (5.0%)
- 2003: 614.1 million gallons (5.2%)
- 2004: 637.4 million gallons (3.7%)
- 2005: 651.3 million gallons (2.2%)
- 2006: 673.4 million gallons (3.4%)
- 2007: 700.5 million gallons (4.0%)
- 2008: 706.2 million gallons (0.8%)
- 2009: 716.8 million gallons (1.5%)
- 2010: 732.1 million gallons (2.1%)
- 2011: 748.8 million gallons (2.3%)
- 2012: 769.7 million gallons (2.8%)

Distribution of the U.S. table wine market by origin is as follows (source: The Beverage Information Group [www.beveragenet.net]):

- California: 68%
- Imported: 26%
- Other states: 6%

Among adults, per capita consumption of table wine was 3.08 gallons in 2012.

Wine supplier gross revenue has been as follows (source: Distilled Spirits Council of the United States [www.discus.org]; change from previous year in parenthesis):

- 2003: \$ 7.50 billion (6.5%)
- 2004: \$ 7.90 billion (5.3%)
- 2005: \$ 8.30 billion (5.1%)
- 2006: \$ 8.62 billion (3.9%)
- 2007: \$ 9.24 billion (7.2%)
- 2008: \$ 9.38 billion (1.5%)
- 2009: \$ 9.48 billion (1.1%)
- 2010: \$ 9.76 billion (2.9%)

- 2011: \$10.19 billion (4.4%)
- 2012: \$10.53 billion (3.3%)
- 2013: \$10.89 billion (3.4%)

According to London-based *International Wine and Spirits Record* (www.iwsp.co.uk), wine consumption in the U.S. is up more than 30% over the past decade, elevating the U.S. past Italy as the world's second-largest consumer of wine.

Euromonitor (www.euromonitor.com) assessed 2012 U.S. retail sales of wine at \$25.2 billion; global sales were \$146.3 billion.

Over 70% of wine purchased for consumption at home is purchased in liquor stores or wine shops, according to The Nielsen Company (www.nielsen.com).

According to IRI (www.iriworldwide.com), wine sales in supermarkets, drug stores, and mass merchandisers for the 52-week period ending October 5, 2013 were \$8.85 billion, a 4.6% increase over the prior year.

Wine accounts for 12% of alcoholic beverages served in bars and 18% of servings at casual-dining restaurants, according to The NPD Group (www.npd.com).

85.2 Market Leaders

According to IRI, the following are the top wine brands sold at supermarkets, drug stores, convenience stores, and mass merchandisers, ranked by 2012 sales:

- Barefoot: \$368.4 million
- Sutter Home: \$278.7 million
- Yellow Tail: \$231.1 million
- Franzia: \$205.6 million
- Woodbridge by Robert Mondavi: \$198.4 million
- Kendall Jackson Vintners: \$153.6 million
- Gallo Family Vineyards: \$129.6 million
- Beringer: \$121.9 million
- Carlo Rossi: \$111.6 million
- Chateau Ste. Michelle: \$105.8 million

85.3 Wine Consumer Characteristics

According to *2014 Consumer Tracking Study*, conducted for the Wine Market Council (www.winemarketcouncil.com), among 228 million U.S. adults, 100 million are wine drinkers.

Distribution of adults by consumption characteristics is as follows:

- Core wine drinker (once per week or more frequently): 15%
- Marginal consumer of wine (once every two or three months): 29%
- Drink beer or spirits only: 21%
- Do not consume alcoholic beverages: 35%

Core wine drinkers account for 91% of wine consumption by volume, with marginal wine drinkers consuming the remaining 9%.

Among those who drink wine, distribution by frequency of consumption is as follows:

- Daily: 11%
- More than once per week: 28%
- Once per week: 17%
- Two-to-three times per month: 20%
- Once per month: 13%
- Once every two or three months: 11%

The demographic distribution of core wine drinkers is as follows:

Gender

- Female: 51%
- Male: 49%

Age

- Millennial (age 19-to-36): 28%
- Generation X (age 37-to-48): 20%
- Baby Boomers (age 49-to-67): 40%
- Seniors (age 67 and older): 12%

Household Income

- Less than \$50,000: 36%
- \$50,000 to \$69,999: 21%
- \$70,000 to \$99,999: 20%
- \$100,000 to \$129,999: 11%
- \$130,000 to \$199,999: 8%
- More than \$200,000: 3%

85.4 Wine Consumer Demographics

According to a November 2013 assessment by International Demographics (www.themediiaudit.com), among 65-to-74 year olds, 17.7% are considered frequent wine consumers, a figure that is 39% higher when compared to the general population. Among 21-to-34 year olds, 9.3% frequently consume wine, while 11.1% of 21-to-49 year olds do so.

In its annual *Market-by-Market* study, GfK MRI (www.gfkmir.com) found the highest percentage of adults who drink wine with dinner in the following metropolitan areas:

- San Francisco-Oakland-San Jose, CA
- New York, NY
- Los Angeles, CA

- Seattle-Tacoma, WA
- Miami-Ft. Lauderdale, FL
- Greenwood-Greenville, MS
- Phoenix, AZ
- Jackson, MS
- Atlanta, GA
- Philadelphia, PA

85.5 Champagne and Sparkling Wine

Sparkling wine, considered a festive drink, is typically uncorked at occasions like New Year's Eve, wedding receptions, and parties. According to M. Shanken Communications (www.mshanken.com), Americans consume more than 260 million glasses of sparkling wine during the holiday season.

Sparkling wines are made all over the world, but those hailing from the Champagne region of France – the only ones that can be called 'champagne' – have a special cachet. An 80-year-old French law carefully maps where the grapes – pinot noir, pinot meunier, and chardonnay – can be grown. Comité Interprofessionnel du Vin de Champagne (CIVC), the industry's regulatory body, sets a maximum yield of 10,500 kilograms per hectare (4.7 tons per acre) for the annual harvest. Champagne can be sold 15 months after harvest; Vintage Champagne and a Champagne Grande Année must age at least five years.

According to the Champagne Bureau (www.champagne.us) 16 million bottles of Champagne are shipped to the U.S. annually.

Moët & Chandon and Veuve Clicquot, with 600,000 and 400,000 cases, respectively, produced annually, are the leading producers of champagne. These two brands, which together account for 55% of champagne sold in the U.S. – along with Krug, Ruinart, and Mercier – are owned by the luxury giant LVMH (www.lvmh.com).

Champagne made by independent grower-producers has been quietly gaining a foothold. Many of these small, family-owned vineyards have long supplied the big houses with grapes: land in Champagne is limited, so big makers rely on the 20,000 or so small farmers across the region for their grapes, which they blend together. About 2,000 of these farmers make their own bubbly, the best of which is increasingly available in the United States.

With a steadily increasing demand, winemakers have asked French regulators to redefine or even expand the boundaries of the Champagne region.

Leading U.S. producers of sparkling wine are Andre Champagne Cellars (1.7 million), Cook's (1.3 million), and Korbel Champagne Cellars (1.2 million cases annually).

85.6 Oneophiles

Enjoyment of wine as a hobby is helping to drive the market. Participation in

wine clubs, winery tours, wine tastings, wine auctions, and wine festivals has become popular. For oenophiles, or wine connoisseurs, drinking, learning about, and collecting wine is a cultural and educational experience.

Among core wine drinkers (i.e. those who drink wine at least weekly), 18% are a members of a wine club; 3% are members of three or more clubs, according to the Wine Market Council.

No other beverage, and few consumer products of any type, are prized as an investment like wine. In 2011, a 300-bottle collection of Chateau Lafite Rothschild sold at a Christie's auction for \$539,280, a record.

According to Fireman's Fund (www.firemansfund.com), as many as 10% of the nation's most affluent households have wine collections worth at least \$100,000.

85.7 Market Resources

IRI, 150 North Clinton Street, Chicago, IL 60661. (312) 726-1221. (www.infores.com)

Wine Institute, 425 Market Street, Suite 1000, San Francisco, CA 94105.
(415) 512-0151. (www.wineinstitute.org)

Wine Market Council, 1734 Saint Andrews Court, St. Helena, CA 94574.
(707) 812-1919. (www.winemarketcouncil.com)

CARBONATED SOFT DRINKS

86.1 Carbonated Soft Drinks

According to Beverage Marketing Corporation (www.beveragemarketing.com), consumption of carbonated soft drinks (CSD) has been as follows (change from previous year in parenthesis):

- 2003: 15.3 billion gallons (0.4%)
- 2004: 15.4 billion gallons (0.7%)
- 2005: 15.3 billion gallons (-0.6%)
- 2006: 15.1 billion gallons (-1.1%)
- 2007: 14.7 billion gallons (-2.6%)
- 2008: 14.2 billion gallons (-3.1%)
- 2009: 13.9 billion gallons (-2.3%)
- 2010: 13.8 billion gallons (-0.8%)
- 2011: 13.6 billion gallons (-1.7%)
- 2012: 13.3 billion gallons (-1.8%)

“It was another challenging year for CSDs and it marks the 8th consecutive year of volume declines ... it’s the 14th consecutive year per capita declined for CSDs. So these declines are more than momentary blips on the radar. They’re a reflection of changing consumer tastes. People want healthier refreshment and they also want variety.”

Michael Bellas, CEO
Beverage Marketing Corp.
Beverage World, 5/13

Even with declining consumption, CSDs still account for 44.7% of all

nonalcoholic beverages (by volume) consumed in the United States, excluding tap water. Carbonated soft drinks account for a consumption equal to bottled water and beer (the #2 and #3 categories) combined.

Of CSD consumption, 66% is regular beverages and 34% is diet beverages. Diet beverages are increasing in marketshare at about 3.5% annually.

According to IRI (www.iriworldwide.com), carbonated soft drink beverage sales in supermarkets, drug stores, and mass merchandisers for the 52-week period ending October 5, 2012 were \$19.42 billion, a 2.9% drop from the prior year.

The Nielsen Company (www.nielsen.com) reports annual sales of pre-packaged CSDs at convenience stores at \$8.1 billion.

Overall marketshare by soft drink beverage company in 2012 was as follows (source: Beverage Marketing Corporation):

- Coca-Cola Company: 43%
- PepsiCo Inc.: 29%
- Dr. Pepper Snapple Group: 17%
- Cott Corp.: 3%
- National Beverage Corp.:* 3%
- All others: 4%

* Includes Faygo and Shasta brands

Marketshare by soft drink brand in 2012 was as follows (source: Beverage Marketing Corporation):

- Coca-Cola: 17.4%
- Diet Coke: 9.9%
- Pepsi-Cola: 9.7%
- Mountain Dew: 7.2%
- Dr. Pepper: 6.7%
- Sprite: 5.9%
- Diet Pepsi: 4.6%
- Coke Zero: 2.5%
- Diet Mountain Dew: 2.1%
- Diet Dr. Pepper: 1.9%
- All others: 32.1%

According to *Beverage Digest*, Coca-Cola controls 70% of fountain sales, a channel which provides a third of its domestic sales and profit. PepsiCo has 20% of fountain sales.

The following companies are among the leading producers of specialty carbonated soft drinks:

- Blue Sky Natural Beverage Co. (www.drinkbluesky.com)
- Boylan Bottling Co. (www.boylandbottling.com)
- Dry Soda Co. (www.drysoda.com)
- Jones Soda Co. (www.jonessoda.com)
- Reed's Inc. (www.reedsgingerbrew.com)

86.2 Consumption Demographics

Among all U.S. adults, 11.6% are heavy soft drink consumers, defined as those consuming ten or more soft drinks per week.

According to a May 2013 assessment by International Demographics (www.themediiaudit.com), the following are the metropolitan areas have the highest percentage of heavy soft drink consumers:

- Oklahoma City, OK: 22.0%
- Cincinnati, OH: 21.5%
- Louisville, KY: 21.0%
- Akron, OH: 19.3%
- Dayton, OH: 17.7%
- Indianapolis, IN: 17.1%
- Lexington, KY: 17.1%
- Baltimore, MD: 16.7%
- Dallas-Ft. Worth, TX: 16.5%
- New Orleans, LA: 16.2%

Data on soft drink consumption in 81 metropolitan areas is available online at www.themediiaudit.com/press/local-releases.

FUNCTIONAL BEVERAGES

87.1 Market Assessment

Packaged Facts (www.packagedfacts.com) assessed the 2012 U.S. market for energy drinks and shots market at \$12.5 billion. The energy drink category experienced 42% growth from 2008-2012, the recession notwithstanding, while energy shots grew 168% during the same period.

The 2012 sports drink market was \$6.9 billion in 2012, according to Packaged Facts, a 6.5% growth from the previous year.

According to IRI (www.iriworldwide.com), sales of functional beverages at supermarkets, drug stores, and mass merchandisers for the 52-week period ending October 5, 2013 were as follows (change from previous year in parenthesis):

- Sports drinks: \$3.17 billion (1.3%)
- Energy drinks: \$2.49 billion (1.1%)

Sports and Energy Drinks in the U.S., a July 2013 report by Euromonitor (www.euromonitor.com) estimates the U.S. market for energy and sports drinks at \$15.9 billion; the market has a 5% annual growth rate.

87.2 Energy Drinks

According to Beverage Marketing Corporation (BMC, www.beveragemarketing.com), energy drink consumption has been as follows (change from previous year in parenthesis):

- 2003: 60 million gallons (55%)
- 2004: 94 million gallons (64%)
- 2005: 161 million gallons (79%)
- 2006: 243 million gallons (49%)
- 2007: 336 million gallons (28%)
- 2008: 354 million gallons (9%)
- 2009: 354 million gallons (no change)
- 2010: 384 million gallons (5%)
- 2011: 450 million gallons (18%)
- 2011: 514 million gallons (14%)

More than 2,000 energy drink brands are on the market in the U.S., according to *Brandweek*.

The leading energy sports drinks, ranked by 2012 retail sales, are as follows (source: IRI; change from previous year in parenthesis):

Energy Drinks

- Red Bull: \$3.18 billion (11.1%)
- Monster Energy: \$1.88 billion (12.6%)
- Monster Rehab: \$ 410 million (171.8%)
- Rockstar: \$ 325 million (11.6%)
- NOS: \$ 264 million (6.9%)
- Java Monster: \$ 251 million (22.4%)
- Monster Mega: \$ 232 million (17.6%)
- AMP Energy: \$ 184 million (3.0%)
- Red Bull Total Zero: \$ 147 million (n/a)
- Rockstar Sugar Free: \$ 144 million (0.5%)
- Rockstar Recovery: \$ 138 million (-5.1%)
- Full Throttle: \$ 106 million (0.1%)

Energy Shots

- 5 Hour Energy: \$1.19 billion (1.0%)
- Stacker 26 Hour Power: \$ 21 million (-23.7%)
- Private label: \$ 20 million (30.7%)
- Stacker 2 Xtra: \$ 19 million (11.0%)

Despite the hip and trendy image associated with energy drinks, only 4% of energy drink buyers cited “cool and trendy” as a reason for their energy drink purchase in a recent survey by The NPD Group. NPD found “the need for an energy boost” to be the number one reason for purchase across all buyer segments. Taste and preference for the energy category as the biggest attraction among younger consumers, while older buyers cited the need for caffeine, instant energy, and an alternative to coffee. Thirty-six percent (36%) of energy drink buyers reported doing something work-related when they made their last energy drink purchase; more than travel, school, meal time, and sporting events combined.

Seventy percent (70%) of energy drink buyers in the NPD survey reported purchasing their drinks cold and for immediate consumption. Over one-half of energy drink purchases are unplanned. The convenience channel has reaped the benefits of this impulse behavior. Two-thirds of buyers cite a purchase in the convenience retail channel within the past six months, and 50% report their last purchase in this channel rather than in traditional grocery stores.

In its annual *Market-by-Market* study, GfK MRI (www.gfkmir.com) found per-capita energy drink consumption highest in the following metropolitan areas:

- Bakersfield, CA
- Fresno-Visalia, CA
- Santa Barbara-Santa Maria-San Luis Obispo, CA

- San Diego, CA
- Gainesville, FL
- Brownsville-Harlingen-McAllen-Weslaco, TX
- Dallas-Ft. Worth, TX
- Salt Lake City, NV
- Las Vegas, NV
- Richland-Yakima-Pasco-Kennewick, WA

87.3 Sports Drinks

According to Beverage Marketing Corporation, consumption of sports beverages has been as follows (change from previous year in parenthesis):

- 2003: 883 million gallons (14%)
- 2004: 990 million gallons (12%)
- 2005: 1.21 billion gallons (22%)
- 2006: 1.32 billion gallons (12%)
- 2007: 1.35 billion gallons (2%)
- 2008: 1.32 billion gallons (-3%)
- 2009: 1.16 billion gallons (-12%)
- 2010: 1.26 billion gallons (9%)
- 2011: 1.37 billion gallons (9%)
- 2012: 1.40 billion gallons (2%)

The average consumer drinks approximately 4.3 gallons of sports drinks annually, according to BMC.

According to Packaged Facts, there are 77 million users of sports drinks in the U.S. Sixty-four percent (64%) of high-volume sports drink users are males, 36% are Millennials, 25% are Baby Boomers, and 54% are non-Hispanic white.

Gatorade (www.gatorade.com), the sports drink developed in 1965 at the University of Florida, has more than 80% marketshare of the sports drink category. Gatorade was acquired by PepsiCo (www.pepsico.com) in 2000 as part of the \$13 billion acquisition of Quaker Oats Company.

Powerade (www.powerade.com), a division of The Coca-Cola Company, holds the number two market position in the segment, with a 13% marketshare.

The top sports drinks, ranked by 2012 retail sales, are as follows (source: IRI; change from previous year in parenthesis):

- Gatorade G Series Perform: \$2.77 billion (1.3%)
- Powerade Ion 4: \$ 878 million (5.6%)
- Gatorade G2 Perform: \$ 516 million (-8.9%)
- Gatorade: \$ 408 million (33.6%)
- Powerade Zero: \$ 233 million (18.7%)
- G2: \$ 144 million (10.2%)
- Gatorade Frost: \$ 106 million (-0.1%)
- Gatorade Cool Blue: \$ 69 million (16.5%)

- Gatorade Fierce: \$ 66 million (37.8%)
 - Gatorade All Stars: \$ 56 million (2.6%)
-

“Gatorade remains the giant in the category with over half the market. It’s really a category that’s highly concentrated in the two leading trademarks, Gatorade and Powerade. Overall, we continue to think that the category is well-positioned for today’s consumer.”

Gary Hemphill, Managing Director
Beverage Marketing Corporation
Beverage World, 5/13

87.4 Relaxation Beverages

With the market for energy drinks hitting a plateau in sales, beverage suppliers are hoping to develop another functional beverage market: relaxation drinks.

Beverage Marketing Corporation estimates the 2012 U.S. wholesale market for relaxation beverages at \$32 million, a 19% increase from the previous year. Consumption was 1.5 million gallons, a 25% increase from 2011.

“Can relaxation, a good night’s sleep or happiness come from a lightly carbonated, berry-flavored beverage? Consumers are warming up to drinks that could fill the chasm between taking medication for anxiety or sleep problems and doing nothing.”

The Wall Street Journal, 10/2/13

Relaxation beverage products include Just Chill from Chill Group Inc. (www.drinkjustchill.com), Marley's Mellow Mood from Marley Beverage Company (www.drinkmarley.com), and Neuro Bliss and Neuro Sleep from Neuro Drinks (www.drinkneuro.com).

JUICE & FRUIT DRINKS

88.1 Overview

According to Beverage Marketing Corporation(www.beveragemarketing.com), annual consumption of fruit beverages is 3.5 billion gallons, a figure which has been declining about 2% annually in recent years.

The juices market consists of 100% fruit juice from concentrate, 100% fruit juice not from concentrate, nectar (30%-to-99% juice), fruit drinks (0-to-29% juice), and vegetable juice. The 100% juice categories account for 68% of the market.

While once considered the healthier alternative to carbonated soft drinks, the trend toward healthier eating has actually led to sagging sales of fruit juice and juice drinks, with many consumers shying away from the high sugar and high calorie content.

88.2 Market Assessment

According to Mintel (www.mintel.com), annual consumer spending for juice and fruit beverages is approximately \$19 billion, an amount that has remained relatively constant in recent years. While sales in supermarkets have declined slightly, spending on RTD juice drinks at other retail outlets has increased.

According to *Beverage World*, the annual packaged juice market, by category, is as follows:

- Cranberry: \$1.11 billion
- Apple: \$ 828 million
- Vegetable other than tomato: \$ 818 million
- Grape: \$ 367 million
- Orange: \$ 166 million
- Tomato: \$ 108 million
- Prune: \$ 101 million
- Pineapple: \$ 87 million
- Grapefruit: \$ 58 million

According to IRI (www.iriworldwide.com), juice and fruit drink sales in supermarkets, drug stores, and mass merchandisers for the 52-week period ending October 6, 2013 were as follows:

- Refrigerated juices and drinks: \$6.08 billion
- Bottled juices: \$5.47 billion
- Aseptic packaged juices: \$1.48 billion

- Canned juices: \$ 750 million
- Frozen juices: \$ 600 million

88.3 Market Leaders

According to IRI, the following are the leading orange juice brands sold at supermarkets, drug stores, convenience stores, and mass merchandisers, ranked by 2012 sales:

- Tropicana Pure Premium: \$1.03 billion
- Simply Orange: \$ 694 million
- Private label: \$ 566 million
- Florida's Natural: \$ 405 million
- Minute Maid Premium: \$ 385 million
- Homemaker: \$ 39 million
- Minute Maid Premium Kids: \$ 37 million

The leading brands of kids juice drinks are as follows (source: IRI):

- Capri Sun: \$582 million
- Kool Aid Jammers: \$221 million
- Hi C: \$ 90 million
- Apple & Eve Fruitables: \$ 41 million
- Capri Sun Super V: \$ 29 million

The leading brands of bottled fruit drinks are as follows (source: IRI):

- Hawaiian Punch: \$185 million
- V8 Splash: \$125 million
- Tampico: \$ 91 million
- Snapple: \$ 74 million
- Bug Juice: \$ 67 million
- Tum-E Yummies: \$ 66 million
- Private label: \$ 65 million
- Fuze: \$ 60 million
- Kool-Aid Bursts: \$ 55 million

88.4 RTD Juice and Smoothies

According to *Beverage World State of The Industry*, RTD juice and smoothie market leaders are as follows:

Refrigerated Juice and RTD Smoothies

- Naked: \$104.3 million
- Naked Superfood: \$ 97.8 million
- Bolthouse Farms: \$ 56.4 million
- Odwalla: \$ 32.2 million

Single-Serve Bottled Juice and RTD Smoothies

- SoBe: \$20.6 million
- F'real: \$ 5.2 million
- V8 Splash Smoothies: \$ 4.1 million

COFFEE

89.1 Consumption

Americans consumed approximately 7.0 billion gallons of coffee in 2012.

The coffee market consists of three segments:

- Roasted and instant coffee purchased at supermarkets and other retail outlets
- Away-from-home consumption of regular and specialty coffee at coffeeshops, restaurants, and other establishments
- Ready-to-drink (RTD) coffee

Eighty-three percent (83%) of Americans drink coffee – 63% drink it every day and 75% do so at least weekly – according to *National Coffee Drinking Trends 2013*, by the National Coffee Association (NCA, www.ncausa.org).

There are more U.S. consumers who drink coffee daily than there are soft drink consumers (51%). Seventy-three percent (73%) of coffee consumed in the U.S. is prepared at home.

The following are further findings of *National Coffee Drinking Trends 2013*:

- Thirty-one percent (31%) of adults drink gourmet coffee daily.
- Daily consumption of traditional coffee dropped to 49% in 2013 from 56% in 2012.
- The single-cup brewing format continues to grow steadily: 13% of the U.S. population drink a coffee made in a single-cup brewer daily, an increase from 4% who did so in 2010.
- Daily consumption of a coffee made in a drip coffee maker dropped to 37% in 2013 from 43% in 2010.

A positive health perception is driving increased coffee consumption. Responses in surveys by the NCA show that 46% of consumers recognize the inherently positive benefits of drinking coffee, an increase from 36% in 2005.

According to IRI (www.iriworldwide.com), annual coffee sales in supermarkets, drug stores, and mass merchandisers for the 52-week period ending October 2013 were \$8.27 billion, a 6.2% increase from the prior year.

89.2 DemographicsConsumption

National Coffee Drinking Trends 2013 reports the following consumption trends

among age and ethnic demographic segments:

- Seventy-six percent (76%) of adult Hispanic-Americans drink coffee daily, a figure that is 13 percentage points higher than the total population. Forty-seven percent (47%) of African-Americans and 64% of Caucasian-Americans drink coffee daily.
- Among Hispanic-Americans, daily consumption of gourmet coffee beverages is 44%, significantly higher than Caucasian-Americans (30%) and African-Americans (25%).
- For espresso-based beverages the corresponding breakout is 24% among Hispanic-Americans, 12% among African-Americans, and 10% among Caucasian-Americans, while for gourmet varieties of traditional coffee, 23% among Hispanic-Americans, 20% among Caucasian-Americans, and 13% among African-Americans.
- Overall daily consumption of coffee by younger consumers appears to have dropped. Among those ages 18-to-24, daily overall coffee consumption fell to 41% in 2013 from 50% in 2012, and for those ages 25-to-39 to 59% from 63%. However, the 2013 figures are more consistent with levels in earlier years, suggesting that the 2013 decline indicates volatility in these segments rather than softening.
- Overall daily consumption of coffee among those ages 60 and older rose to 76% in 2013 from 71% in 2012, and for those 40-to-59 to 69% in 2013 from 65% in 2012.
- Among consumers ages 60 and older, daily consumption of gourmet varieties of traditional coffee increased to 24% in 2013 from 19% in 2012. For those 25-to-39, the figure dropped to 18% in 2013 from 26% in 2012. For non-gourmet traditional coffee, daily consumption remained essentially steady for those ages 60 and older, but fell among those ages 18-to-24, from 27% to 17% in 2013.
- Younger consumers showed more affinity for espresso-based beverages than their elders, with 16% of those 18-to-39 drinking them daily compared with 6% of those ages 60 and older.

89.3 RTD Coffee

According to *Beverage World State of The Industry 2013*, 66.6 million gallons of ready-to-drink coffee were consumed in 2012, a 9.5% increase from a year prior.

The leading RTD coffee drinks, ranked by 2012 retail sales, are as follows (source: IRI; change from previous year in parenthesis):

- Starbucks Frappuccino: \$714 million (9.3%)
- Doubleshot: \$342 million (18.6%)
- Starbucks Frappuccino Light: \$ 28 million (4.3%)
- Doubleshot Light: \$ 9 million (0.3%)

89.4 Coffeeshops

Coffeeshops are assessed in Chapter 21.

89.5 Market Resources

National Coffee Association, 45 Broadway, Suite 1140, New York, NY 10006.
(212) 766-4007. (www.ncausa.org)

TEA

90.1 Consumption

Americans consume over 55 billion servings of tea, or over 2.50 billion gallons, each year.

The Sage Group (www.thesagegroup.com) estimated the retail size of the U.S. tea industry at more than \$27 billion. A 2013 estimate by *Nation's Restaurant News* placed the market significantly higher, at \$40 billion.

According to *The 2013 State of the U.S. Tea Industry*, by the Tea Association of the USA (www.teausa.com), tea imports were 277 million pounds in 2012.

The U.S. wholesale tea market in 2013 was \$10.4 billion, distributed as follows:

- Supermarkets, drug stores and mass merchandisers: \$2.40 billion
- Ready-to-drink: \$5.10 billion
- Specialty segment: \$1.73 billion
- Foodservice: \$1.18 billion

According to the Tea Association of the USA, after water, tea is the most widely consumed beverage in the world. Tea can be found in almost 80% of U.S. households. It is the only beverage commonly served hot or iced, anytime, anywhere, for any occasion. On any given day, over 130 million Americans – about one-half the population – drink tea.

U.S. tea consumption by type is as follows:

- Eighty-five percent (85%) of tea consumed in the U.S. is iced.
- Eighty-two percent (82%) of all tea consumed is black tea, 17% is green tea, and 1% is oolong, red, and white tea.
- Sixty-five percent (65%) of the tea brewed in the United States is prepared using tea bags.
- Instant and loose tea account for about three-fourths of tea consumed in the U.S.; ready-to-drink (RTD) and iced tea mixes comprise about one fourth.

According to IRI, sales of bag and loose tea in supermarkets, drug stores, and mass merchandisers for the 52-week period ending October 6, 2013 were \$1.22 billion, a 6.9% increase from the prior year.

90.2 RTD Tea

According to Beverage Marketing Corporation (www.beveragemarketing.com), consumption of RTD tea has been as follows (change from previous year in parenthesis):

- 2003: 497.0 million gallons (1%)
- 2004: 509.9 million gallons (3%)
- 2005: 555.9 million gallons (9%)
- 2006: 760.9 million gallons (37%)
- 2007: 875.1 million gallons (15%)
- 2008: 859.3 million gallons (-2%)
- 2009: 901.4 million gallons (1%)
- 2010: 1.014 billion gallons (12%)
- 2011: 1.063 billion gallons (5%)
- 2012: 1.114 billion gallons (5%)

The marketshare leaders in RTD tea, ranked by 2012 sales, are as follows (source: Beverage Marketing Corporation; change from previous year in parenthesis):

- AriZona: \$685.7 million (-1.4%)
- Lipton: \$370.6 million (-5.0%)
- Lipton Brisk: \$308.0 million (-4.6%)
- Snapple: \$211.5 million (-4.2%)
- Diet Snapple: \$197.6 million (14.4%)
- AriZona Arnold Palmer: \$190.8 million (17.2%)
- Lipton Pureleaf: \$167.9 million (6.5%)
- Lipton Diet: \$147.5 million (9.8%)
- Gold Peak: \$119.1 million (32.1%)
- Nestlé: \$ 84.7 million (-26.4%)
- Peace Tea: \$ 76.8 million (36.9%)
- Private label: \$ 69.4 million (-8.0%)

According to IRI, sales of RTD tea and coffee in supermarkets, drug stores, and mass merchandisers for the 52-week period ending October 6, 2013 were \$2.25 billion, a 0.8% increase from the prior year.

90.3 Tea Stores and Tea Bars

According to The NPD Group (www.npd.com), servings of hot tea at specialty retailers – tea bars and coffeeshops – increased 18% for the 12-month period ending February 2013; servings of iced tea increased 5% during the same period.

There are only a few dozen tea bars in the United States, excluding coffeeshops that also have tea on their menu or retail tea stores that also offer limited beverage service. Argo Tea, with 16 locations in the U.S., is the largest tea bar chain. For comparison, there are approximately 20,000 coffeeshops in the U.S. and Starbucks

operates over 11,000 locations.

Given the increasing popularity of tea, the tea bar count could rise dramatically in the near future. Several companies are rolling out plans for expansion.

In 2013, Starbucks acquired the 300-unit Teavana retail tea brand for \$620 million. Teavana derives only about 5% of revenue from beverage service. With the acquisition, Starbucks plans to turn Teavana into a place where patrons can enjoy a cup of brewed tea as well as purchase retail tea products.

“[Starbucks CEO] Howard Schultz pledged to ‘do for tea what we did for coffee.’ Considering that Starbucks was the chain that brought premium coffee to the masses, that is good news for those who have long promoted premium tea.”

Nation's Restaurant News, 1/14/13

In 2012, The Coffee Bean & Tea Leaf announced plans to add a tea-bar concept to its 850 coffeeshop units.

Also in 2012, the McAlister Deli chain debuted a prototype restaurant with a stand-apart tea bar.

Jamba Juice, which invested in Talbott Tea, a premium tea brand, announced plans to introduce hot and cold tea to its menu and sell packaged tea at its 800+ locations.

Portola Coffee Lab, a Southern California chain, launched Seventh Tea Bar as a standalone concept in 2013.

90.4 Market Resources

Tea Association of the USA, 362 Fifth Avenue, Suite 801, New York, NY 10001. (212) 986-9415. (www.teausa.com)

BOTTLED WATER

91.1 Consumption and Spending

According to Beverage Marketing Corporation (www.beveragemarketing.com), consumption of bottled water has been as follows (change from previous year in parenthesis):

- 2006: 8.3 billion gallons (10%)
- 2007: 8.8 billion gallons (6%)
- 2008: 8.7 billion gallons (-1%)
- 2009: 8.4 billion gallons (-3%)
- 2010: 8.7 billion gallons (3%)
- 2011: 9.1 billion gallons (4%)
- 2012: 9.6 billion gallons (6%)

Per capita consumption of bottled water has been as follows (source: Beverage Marketing Corporation):

- 2009: 27.6 gallons
- 2010: 28.3 gallons
- 2011: 29.2 gallons
- 2012: 30.8 gallons
- 2013: 32.0 gallons

“The bottled water category has benefitted from the backlash against carbonated soft drinks, offering consumers a refreshing beverage option with zero calories. What once was holding the category back – environmental concern mainly with regard to its plastic packaging – some say is less of an obstacle as bottled water companies have made extensive efforts to light-weight their bottles.”

Beverage World, 5/13

According to the International Bottled Water Association (IBWA, www.bottledwater.org), annual wholesale sales of bottled water are approximately \$12 billion.

Bottled water sales in supermarkets, drug stores, and mass merchandisers for the 12-month period ending October 6, 2013 are \$8.5 billion, a 3.5% increase over the prior year, according to IRI (www.iriworldwide.com).

Annual convenience store sales of bottled water are \$2.5 billion, according to The Nielsen Company (www.nielsen.com).

91.2 Consumption Demographics

According to International Demographics ([www.themediiaudit.com](http://www.themediiaaudit.com)), the following are the metropolitan areas with the highest percentage of adults who purchase bottled water at least once per month:

- Dallas-Ft. Worth, TX: 67.1%
- Charlotte, NC: 65.2%
- New York, NY: 63.3%
- Boston, MA: 62.6%
- Norfolk, VA: 62.6%
- Las Vegas, NV: 62.0%
- Orlando, FL: 61.8%
- Philadelphia, PA: 61.5%
- Indianapolis, IN: 61.3%
- Oklahoma City, OK: 61.3%

The following metropolitan areas have the lowest percentage of adults purchasing bottled water:

- Columbia-Jefferson City, MO: 36.5%
- Rochester, NY: 36.8%
- Grand Rapids, MI: 40.9%
- Louisville, KY: 41.5%
- Madison, WI: 42.0%

Data on bottled water purchases in 81 metropolitan areas is available online at www.themediiaaudit.com/press/local-releases.

91.3 Market Leaders

The marketshare leaders in the U.S. bottled water market are as follows:

- Nestlé Waters North America (www.nestle-watersna.com), which owns Acqua Panna, Arrowhead, Calistoga, Contrex, Deer Park, Ice Mountain, Nestlé Pure Life, Ozarka, Perrier, Poland Spring, San Pellegrino, and Zephyrhills

- Dasani (www.dasani.com) and Glacéau (www.glaceau.com), owned by The Coca-Cola Company
- Aquafina (www.aquafina.com), owned by PepsiCo

According to IRI, the top-selling bottled water brands in supermarkets, drug stores, convenience stores, and mass merchandisers in 2012 were as follows (change from prior 12-month period in parenthesis):

- Private label: \$1.63 billion (12.9%)
- Nestlé Pure Life: \$ 939 million (2.2%)
- Dasani: \$ 901 million (7.0%)
- Aquafina: \$ 896 million (3.6%)
- Glacéau Vitaminwater: \$ 678 million (-7.9%)
- Poland Spring: \$ 558 million (6.1%)
- Glacéau Smartwater: \$ 487 million (27.5%)
- Deer Park: \$ 411 million (15.4%)
- Ozarka: \$ 321 million (1.3%)
- Glacéau Vitaminwater Zero: \$ 255 million (2.1%)

91.4 Market Resources

International Bottled Water Association, 1700 Diagonal Road, Suite 650, Alexandria, VA 22314. (703) 683-5213. (www.bottledwater.org)

MILK

92.1 Consumption and Dairy Production

According to the International Dairy Foods Association (IDFA, www.idfa.org), 93% of households purchase milk at least once each year. The percentages of households purchasing various types of fluid milk are as follows:

- Reduced fat white milk: 56%
- Whole white milk: 42%
- Fat free white milk: 35%
- Low fat white milk: 34%
- Flavored milk: 32%

The Economic Research Service of the U.S. Department of Agriculture (USDA, www.usda.gov) reported that total farm milk production in 2013 in the U.S. was 201.2 billion pounds, a 0.4% increase over the previous year.

The Dairy Farmers of America (www.dfamilk.com), a dairy marketing cooperative owned by 19,500 dairy farmers across the U.S., sells more than 62 billion pounds of milk annually for its members.

92.2 Consumer Spending

According to IRI (www.iriworldwide.com), annual milk sales in supermarkets, drug stores, and mass merchandisers for the 12-month period ending October 6, 2013 were \$19.42 billion, a 2.9% decline from the prior year.

According to the National Association of Convenience Stores (NACS, www.nacsonline.com), annual fluid milk sales in convenience stores are \$3.1 billion.

Milk consumed through federal school programs represents 5.6% of U.S. fluid milk sales, according to the USDA.

Annual vending machine sales of milk are approximately \$700 million, according to *Vending Times*. Milk is sold in approximately 83,000 machines across the U.S.

92.3 Market Drivers

According to Data Development Worldwide (www.datadw.com), among consumers who are increasing their consumption of milk, the reasons for drinking more milk are as follows:

- Healthier for myself or child: 32%
- Trying to cut back on fats or trying to lose weight: 24%
- Like the taste: 14%
- Pregnant or nursing a baby: 12%
- Good for bones: 7%

92.4 Market Resources

International Dairy Foods Association, 1250 H Street NW, Suite 900, Washington, DC 20005. (202) 737-4332. (www.idfa.org)

BEVERAGE SERVICE IN RESTAURANTS & BARS

93.1 Market Assessment

According to the National Restaurant Association (www.restaurant.org), beverage sales account for approximately 21% of total revenues in full-service restaurants. Total sales at full-service restaurants for 2014 are projected at \$212.4 billion; beverage sales will account for approximately \$44.6 billion. At quick-service restaurants, beverages account for approximately 4% of the average customer check. Of the \$195.4 billion in projected total sales for 2014, quick-service restaurants are projected to sell an estimated \$7.8 billion in beverages. These figures do not include beverage sales at bars and taverns or snack bars.

“Beverages are the most popular items ordered at restaurants in America. Right off the bat, a drink is a very important thing to the market-place. It’s not a hamburger or French fries, not that those aren’t important, but beverages represent the biggest purchase category.”

Harry Blazer, Vice President
The NPD Group

There are approximately 350,000 on-premise licensed locations serving alcoholic beverages in the U.S., according to Trade Dimensions (www.tdlinx.com).

According to Technomic (www.technomic.com), sales of spirits, wine, and beer in restaurants, bars, and other licensed on-premise locations were approximately \$103 billion. Adult beverage on-premise spending is increasing at about 5% per year, while on-premise volume is declining at roughly 1%.

A survey by Mintel (www.mintel.com) found that 44% of full-service restaurant customers had ordered a cocktail in the prior three months.

93.2 Refreshment and Nonalcoholic Beverage Service in Restaurants

According to The NPD Group (www.npd.com), restaurants serve approximately 50 billion nonalcoholic drinks annually. (This total does not include coffeeshops or coffee purchased for takeout.)

The following are the number of servings of nonalcoholic beverages at restaurants (sources: The NPD Group and *Nation's Restaurant News*):

- Regular carbonated soft drinks: 12.10 billion
- Iced tea: 5.35 billion
- Tap water: 4.50 billion
- Diet carbonated soft drinks: 4.17 billion
- Traditional coffee: 3.50 billion
- Bottled water: 2.70 billion
- Specialty coffee: 2.40 billion
- Non-carbonated soft drinks: 2.00 billion
- Juice: 1.90 billion
- Milk: 1.50 billion
- Shakes/malts/floats: 800 million
- Frozen/slushie soft drinks: 770 million
- Hot tea: 650 million
- Iced coffee: 500 million
- Smoothies: 500 million
- Hot chocolate: 210 million

The Beverage Consumer Trend Report, by Technomic, reported that 71% of adults purchase beverages away from home at least twice a week.

93.3 Alcoholic Beverage Service in Full-Service Restaurants

Full-service restaurants serve approximately 2.5 billion alcoholic beverages annually, according to The NPD Group. (This total does not include drinks served at bars or concessions.) Thirty-five percent (35%) of full-service restaurant order include an alcoholic beverage, a percentage that has been relatively constant for several years.

According to Technomic, spending on alcoholic beverages as a percentage of guest total at casual-dining chain restaurants ranges between 14% and 25%.

“Casual-dining chains such as Chili’s Grill & Bar and T.G.I. Friday’s generate about 14% of average sales from beverage alcohol, whereas more upscale brands like Bonefish Grill average closer to 17%. However, casual-dining chains that have a strong focus on a particular adult beverage, such as beer-centric Buffalo Wild Wings or BJ’s Restaurant & Brewhouse, often generate upward to 25% of their sales from alcoholic beverages.”

Donna Hood Crecca, Senior Director
Adult Beverage Resource Group
Technomic
Nation’s Restaurant News, 3/25/13

According to The NPD Group, on-premise servings of alcoholic beverages are distributed as follows:

	Bars	Casual-Dining
• Beer:	54%	50%
• Cocktails:	33%	32%
• Wine:	12%	18%

According to The NPD Group, 37% of adults include alcohol with their casual/fine-dining restaurant dinners from Friday to Sunday; 34% do so when dining between Monday and Thursday.

Although weekend lunch is an occasion for beverage alcohol consumption for many, consumption nearly triples between lunch and dinner. An alcoholic beverage is ordered at 13% of casual- and fine-dining lunch occasions, whereas an alcoholic beverage is ordered 36% of the time for a dinner meal.

Beer is generally the preferred drink at lunches that include an alcoholic beverage; 55% of lunches where beverage alcohol is consumed include beer. Cocktails and wine take the lead at dinnertime; those consuming beer drop to 45% for that daypart. Happy hour, the hours between 4:00 p.m. and 7:00 p.m., is when consumption of beer (58%) is highest, and cocktails during this time are on par with dinnertime consumption (34%). While wine is generally consumed throughout the week, cocktails are more popular on the weekends.

NPD found that the more alcoholic beverages people drink, the more they spend when dining out. The average dining check is about \$12.00 without beverage alcohol.

With alcohol, the average check amount almost doubles. Despite the fact that different foods affect check size (especially when pairing steak with red wine and pasta with white wine, for example), the type of wine also affects the average check amount. People tend to have a higher check when they order red wine, a moderate check with white wine, and a lower check with blush wine. Also, desserts are ordered more often when wine is included with a meal.

93.4 Alcoholic Beverage Service In Limited-Service Restaurants

Though alcoholic beverage service at quick-service restaurants (QSRs) in the U.S. is rare, several chains are beginning to offer beer, wine, and mixed drinks at select locations. Burger King, Burgerville, Sonic Drive-In, and White Castle have offered beer at a few locations but have not expanded the offering chain-wide.

Several fast-casual restaurants chains offer alcoholic beverage service. Chipotle Mexican Grill serves beer and margaritas at most of its 1,498 locations. Noodles & Company, a 327-unit chain, sells beer and wine. Moe's Southwest Grill sells beer and wine at about 50 of its 487 units. Smashburger serves beer at more than 90% of its 186 U.S. locations. Freebirds World Burritos, a 90-unit chain, offers beer at all of its locations and margaritas at some franchised restaurants. While beverage service is well-received by customers at these fast-casual chains, Technomic estimates that even the most successful locations generate only about 5% of sales from alcoholic beverages.

93.5 Nonalcoholic Cocktails

Considering that 70% of adults consume alcoholic beverages less than once per week and 35% are total abstainers, most casual- and fine-dining restaurants are overlooking a huge opportunity by offering only a limited selection of nonalcoholic beverages to their patrons.

In a survey by Technomic, 29% of adults said they like to try new and unique beverages offered at restaurants; 47% of those in the 18-to-24 age demographic indicated this interest.

“One way to boost sales and improve customers’ satisfaction is to offer them distinctive beverages. Dramatic presentations and the promise of health and refreshment are great selling tools that will coax guests away from tap water.”

Nation’s Restaurant News, 10/7/13

PART XI: AWARD WINNERS

BEST NEW CHEFS

94.1 Overview

Food & Wine recognizes 10 Best New Chefs annually. To qualify, chefs must have run a kitchen for no longer than five years.

94.2 Award Winners 2013

Announced in the July 2013 issue of *Food & Wine*, the following were recognized as the Best New Chefs of 2013:

- Danny Bowien (Mission Chinese Food; New York, NY)
- Justin Cogley (Aubergine; Carmel, CA)
- Jose Enrique (Jose Enrique; San Juan, PR)
- Matthew Gaudet (West Bridge; Boston, MA)
- Jamie Malone (Sea Change; Minneapolis, MN)
- Chris Shepherd (Underbelly; Houston, TX)
- Alex Stupak (Empellón Cocina; New York, NY)
- Andy Ticer & Michael Hudman (Andrew Michael Italian Kitchen; Memphis, TN)
- Jason Vincent (Nightwood; Chicago, IL)
- Michael Voltaggio (Ink; Los Angeles, CA)

94.3 Recent Award Winners

Food & Wine recognized the following as the Best New Chefs in recent years:

2012

- Erik Anderson and Josh Habiger (The Catbird Seat; Nashville, TN)
- Danny Grant (RIA at the Waldorf Astoria; Chicago, IL)
- Dan Kluger (ABC Kitchen; New York, NY)
- Corey Lee (Benu; San Francisco, CA)
- Jenn Louis (Lincoln and Sunshine Tavern; Portland, OR)
- Cormac Mahoney (Madison Park Conservatory; Seattle, WA)
- Bryant Ng (The Spice Table; Los Angeles, CA)
- Karen Nicolas (Equinox; Washington, DC)
- Rich Torrisi and Mario Carbone (Torrisi Italian Specialties; New York, NY)
- Blaine Wetzel (Willows Inn; Lummi Island, WA)

2011

- Jason Franey (Canlis; Seattle, WA)
- Bryce Gilmore (Barley Swine; Austin, TX)
- Stephanie Izard (Girl & the Goat; Chicago, IL)
- James Lewis (Bettola; Birmingham, AL)
- Carlo Mirarchi (Roberta's; New York, NY)
- George Mendes (Aldea; New York, NY)
- Viet Pham & Bowman Brown (Forage; Salt Lake City, UT)
- Joshua Skenes (Saison; San Francisco, CA)
- Kevin Willmann (Farmhaus; St. Louis, MO)
- Ricardo Zarate (Mo-Chica; Los Angeles, CA)

2010

- Roy Choi (Kogi Korean BBQ; Los Angeles, CA)
- Matt Lightner (Castagna; Portland, OR)
- Clayton Miller (Trummers On Main; Clifton, VA)
- Missy Robbins (A Voce; New York, NY)
- Jonathon Sawyer (The Greenhouse Tavern; Cleveland, OH)
- Alex Seidel (Fruition; Denver, CO)
- Mike Sheerin (Blackbird; Chicago, IL)
- John Shields (Town House; Chilhowie, VA)
- Jason Stratton (Spinasse; Seattle, WA)
- James Syhabout (Commis; Oakland, CA)

2009

- Nate Appleman (A16; San Francisco, CA)
- Bryan Caswell (Reef; Houston, TX)
- Kelly English (Iris; Memphis, TN)
- Mark Fuller (Spring Hill; Seattle, WA)
- Linton Hopkins (Restaurant Eugene; Atlanta, GA)
- Christopher Kostow (Meadowood; St. Helena, CA)
- Paul Liebrandt (Corton; New York, NY)
- Barry Maiden (Hungry Mother; Cambridge, MA)
- Naomi Pomeroy (Beast; Portland, OR)
- Jon Shook and Vinny Dotolo (Animal; Los Angeles, CA)

2008

- Jim Burke (James; Philadelphia, PA)
- Gerard Craft (Niche; St. Louis, MO)
- Tim Cushman (O Ya; Boston, MA)
- Jeremy Fox (Ubuntu; Napa, CA)
- Koren Grieveson (Avec; Chicago, IL)
- Michael Psilakis (Anthos; New York, NY)
- Ethan Stowell (Union; Seattle, WA)

- Giuseppe Tentori (Boka; Chicago, IL)
- Eric Warnstedt (Hen of the Wood; Waterbury, VT)
- Sue Zemanick (Gautreau's; New Orleans, LA)

2007

- April Bloomfield (The Spotted Pig; New York, NY)
- Gabriel Bremer (Salts; Cambridge, MA)
- Steve Corry (Five Fifty-Five; Portland, ME)
- Matthew Dillon (Sitka & Spruce; Seattle, WA)
- Gavin Kaysen (El Bizcocho; San Diego, CA)
- Johnny Monis (Komi; Washington, DC)
- Sean O'Brien (Myth; San Francisco, CA)
- Gabriel Rucker (Le Pigeon; Portland, OR)
- Ian Schnoebelen (Iris; New Orleans, LA)
- Paul Virant (Vie; Western Springs, IL)

2006

- Cathal Armstrong (Restaurant Eve; Alexandria, VA)
- Jonathan Benno (Per Se; New York, NY)
- Michael Carlson (Schwa Restaurant; Chicago, IL)
- David Chang (Momofuku; New York, NY)
- Mary Dumont (Dunaway Restaurant at Strawberry Banke; Portsmouth, NH)
- Douglas Keane (Cyrus; Healdsburg, CA)
- Christopher Lee (Striped Bass; Philadelphia, PA)
- Pino Maffeo (Restaurant L; Boston, MA)
- Jason Wilson (Crush; Seattle, WA)
- Stewart Woodman (Five Restaurant & Street Lounge; Minneapolis, MN)

BEST NEW RESTAURANTS

95.1 Lists For 2013

The following are critics' lists recognizing the best new restaurants in the United States:

Bon Appétit (August 2013)

- Alma (Los Angeles, CA)
- Saison (San Francisco, CA)
- Rolf & Daughters (Nashville, TN)
- Fat Rice (Chicago, IL)
- Ava Gene's (Portland, OR)
- The Pass & Provisions (Houston, TX)
- The Optimist (Atlanta, GA)
- Jeffrey's & Josephine House (Austin, TX)
- The Whale Wins & Joule (Seattle, WA)
- Aska (Brooklyn, NY)

Condé Nast Traveler (May 2013) - Top Chefs Pick Their Favorite New Restaurant (select U.S. cities only)

- Abbot's Cellar (San Francisco, CA)
- Aska (Brooklyn, NY)
- Atera (New York, NY)
- Bull Valley Roadhouse (Port Costa, CA)
- Campo Fina (Healdsburg, CA)
- Central Kitchen (San Francisco, CA)
- Chez Sardine (New York, NY)
- Comal (Berkley, CA)
- Hog & Hominy (Memphis, TN)
- La Vara (Brooklyn, NY)
- Mintwood Place (Washington, DC)
- Mission Chinese Food (New York, NY)
- Original Joe's (San Francisco, CA)
- Oxheart (Houston, TX)
- Pok Pok Ny (New York, NY)
- Ramen Shop (Oakland, CA)
- Redd Wood (Yountville, CA)
- Restaurant R'evolution (New Orleans, LA)
- Rich Table (San Francisco, CA)

- Saison (San Francisco, CA)
- Spoon Bar & Kitchen (Dallas, TX)
- The Marrow (Brooklyn, NY)
- The NoMad (New York, NY)
- The Optimist (Atlanta, GA)
- The Ordinary (Charleston, SC)
- Underbelly (Houston, TX)
- Watershed on Peachtree (Atlanta, GA)

Esquire (October 2013)

- Betony (Brooklyn, NY)
- Blue Dragon (Boston, MA)
- Bronwyn (Somerville, MA)
- Carriage House (Chicago, IL)
- Coqueta (San Francisco, CA)
- Del Campo (Washington, DC)
- Embeya (Chicago, NY)
- Hinoki & The Bird (Los Angeles, CA)
- Juni (New York, NY)
- King & Duke (Atlanta, GA)
- Mariza (New Orleans, LA)
- MC Kitchen (Miami, FL)
- Paiche (Marina Del Rey, CA)
- Rolf & Daughters (Nashville, TN)
- Spoon Bar & Kitchen (Dallas, TX)
- Stampede 66 (Dallas, TX)
- The Elm (Brooklyn, NY)
- The Ordinary (Charleston, SC)
- Trois Mec (Los Angeles, CA)
- Virtù (Scottsdale, AZ)

GQ (March 2013)

- Little Serow (Washington, DC)
- Hog & Hominy (Memphis, TN)
- Vedge (Philadelphia, PA)
- Cúrate (Asheville, NC)
- Uchi (Houston, TX)
- West Bridge (Cambridge, MA)
- Oxheart (Houston, TX)
- Central Kitchen (San Francisco, CA)
- Baco Mercat (Los Angeles, CA)
- St. Anslem (Brooklyn, NY)
- The Ordinary (Charleston, SC)
- La Vara (Brooklyn, NY)

BEVERAGE EXCELLENCE AWARDS

96.1 Overview

Cheers magazine's Beverage Excellence Awards recognize innovation, creativity, and bottom-line effectiveness in the development of on-premise beverage programs.

Awards are presented at the annual Cheers Beverage Conference in February.

96.2 Award Winners 2013

Best Chain Overall Beverage Program

- Hard Rock Cafe

Best Chain Adult Alcohol-Free Program

- Red Lion Hotels Corp.

Best Chain Bar-Kitchen Synergy

- InterContinental Hotels Group

Best Chain Beer Program

- Ruby Tuesday

Best Chain Beverage Merchandising

- Carrabba's Italian Grill

Best Chain Drink Program

- Omni Hotels & Resorts

Best Chain Hotel Beverage Program

- J.W. Marriott San Antonio Hill Country

Best Chain Multi-Concept Beverage Program

- Walt Disney Parks & Resorts

Best Chain Signature Drink Program

- Tavistock Restaurants

Best Chain Spirits Program

- Celebrity Cruises

Best Chain Wine Program

- Sheraton Hotels & Resorts

Best Staff Training Program

- Marriott International

Beverage Industry Innovator of the Year

- Tippling Brothers

Raising the Bar Award

- Kip Snider, director of beverage: Yard House

96.3 Award Winners 2012**Best Chain Overall Beverage Program**

- P.F. Chang's China Bistro

Best Chain Beer Program

- Rusty Bucket Restaurant & Tavern (Cameron Mitchell Group)

Best Chain Beverage Merchandising

- Quaker Steak & Lube

Best Chain Drink Program

- Ruby Tuesday

Best Chain Hotel Beverage Program

- The Broadmoor

Best Chain Multi-Concept Beverage Program

- Walt Disney Parks & Resorts

Best Chain Signature Drink Program

- Omni Hotels & Resorts

Best Chain Spirits Program

- Fairmont Hotels & Resorts

Best Chain Wine Program

- Fleming's Prime Steakhouse

Best Staff Training Program

- Rusty Bucket Restaurant & Tavern/Cameron Mitchell

96.4 Award Winners 2011**Best Chain Overall Beverage Program**

- Bar Louie

Best Chain Adult Alcohol-Free Program

- Ruby Tuesday

Best Chain Beer Program

- Yard House

Best Chain Beverage Menu

- McCormick & Schmick's Seafood Restaurants

Best Chain Beverage Merchandising

- Westin Hotels

Best Chain Drink Program

- Ram International

Best Chain Hotel Beverage Program

- Royal Caribbean International

Best Chain Multi-Concept Beverage Program

- The Cheesecake Factory

Best Chain Signature Drink Program

- The Phoenician Resort

Best Chain Spirits Program

- Ocean Prime Restaurant

Best Chain Wine Program

- P.F. Chang's China Bistro

CHAIN RESTAURANT CONSUMERS' CHOICE AWARDS

97.1 Overview

Technomic (www.technomic.com) presents annual Chain Restaurant Consumers' Choice Awards.

The inaugural awards, presented in January 2013, were based on surveys following 80,000 restaurant visits where consumers rated 120 restaurant chains on more than 60 different attributes.

97.2 Award Winners 2013

Availability of Healthy Options

- Quick-service: Subway
- Fast-casual: Jason's Deli
- Full-service: Mimi's Cafe

Craveability

- Quick-service: Auntie Anne's
- Fast-casual: Zaxby's
- Full-service: Joe's Crab Shack

Kid Friendly

- Quick-service: CiCi's Pizza
- Fast-casual: McAlister's Deli
- Full-service: Friendly's

Pleasant, Friendly Service

- Quick-service: In-N-Out Burger
- Fast-casual: Firehouse Subs
- Full-service: Bonefish Grill

Social Consciousness

- Quick-service: Chick-fil-A
- Fast-casual: Panera Bread
- Full-service: The Cheesecake Factory

97.3 Market Resources

Technomic, Inc., 300 South Riverside Plaza, Suite 1200 South, Chicago, IL 60606.
(312) 876-0004. (www.technomic.com)

DINERS' CHOICE AWARDS

98.1 Overview

Based on annual surveys of registered users, Open Table (www.opentable.com) designates Diners' Choice Awards in several categories. The awards are based on responses from a Dining Feedback Form provided to each party making reservations through Open Table.

Diners' Choice Awards are designated in the following categories:

- Best Restaurant
- Best Service
- Brunch
- Fit for Foodies Restaurants
- Hot Spots
- Hottest Restaurant Bars
- Late-Night Dining
- Most Notable Wine Lists
- Most Romantic Restaurants
- Most Scenic Views
- Outdoor Dining
- Top American Cuisine

98.2 Best Restaurant

The following are the winners of the 2013 Diners' Choice Award for Best Overall Restaurant:

- Acquerello (San Francisco, CA)
- Afternoon Tea - The Phoenician (Scottsdale, AZ)
- Artisanal Restaurant (Banner Elk, NC)
- Atelier Crenn (San Francisco, CA)
- Auberge du Soleil (Rutherford, CA)
- Bacchanalia (Atlanta, GA)
- Bibou (Philadelphia, PA)
- Binkley's Restaurant (Cave Creek, AZ)
- Bistro L'Hermitage (Woodbridge, VA)
- Blue Hill at Stone Barns (Pocantico Hills, NY)
- BOCA (Cincinnati, OH)

- Bones (Atlanta, GA)
- Bouchard Restaurant and Inn (Newport, RI)
- Bouley (New York, NY)
- Cafe Juanita (Seattle, WA)
- Cafe Matisse (Rutherford, NJ)
- Cafe Provence (Prairie Villiage, KS)
- Cafe Renaissance (Vienna, VA)
- Canoe (Atlanta, GA)
- Capital Grille (Dallas, TX)
- Carpe Vino (Auburn, CA)
- Charleston (Baltimore, MD)
- Charleston Grill (Charleston, SC)
- Chez Francois (Vermilion, OH)
- Chez Nous French Restaurant (Humble, TX)
- CityZen (Washington, DC)
- Collichio & Sons - Main Dining Room (New York, NY)
- Coltello Ristorante Italiano (Crosswicks, NJ)
- Cúrate (Asheville, NC)
- Daniel (New York, NY)
- Daniel - Lounge Seating (New York, NY)
- Del Posto (New York, NY)
- Eleven Madison Park (New York, NY)
- Farmhouse Inn & Restaurant (Forestville, CA)
- Fat Canary (Williamsburg, VA)
- Fearington House Restaurant (Pittsboro, NC)
- Franklinville Inn (Franklinville, NJ)
- Gaetano's & Ristorante Mediterraneo (Forest Park, IL)
- Geronimo (Santa Fe, NM)
- Girl & the Goat (Chicago, IL)
- goosefoot (Chicago, IL)
- Gotham Bar and Grill (New York, NY)
- Gramercy Tavern (New York, NY)
- Halls Chophouse (Charleston, SC)
- Highlands Bar & Grill (Birmingham, AL)
- joan's in the Park (Saint Paul, MN)
- Joe's Seafood, Prime Steak & Stone Crab (Chicago, IL)
- JORY Restaurant at The Allison Inn & Spa (Newberg, OR)
- JUNGSIK (New York, NY)
- Kai - Sheraton Wild Horse Pass Resort (Chandler, AZ)
- L'Auberge Chez Francois (Great Falls, VA)
- L'Etoile Restaurant (Madison, WI)
- L2O (Chicago, IL)
- La Grenouille (New York, NY)
- Lawry's The Prime Rib (Beverly Hills, CA)

- Le Bernardin (New York, NY)
- Le Bistro (Incline Village, NV)
- Leis Family Class Act Restaurant (Kahului, HI)
- Les Nomades (Chicago, IL)
- Mama's Fish House (Paia, HI)
- Marinus - Bernardus Lodge (Carmel Valley, CA)
- Menton (Boston, MA)
- Michael's - South Point Casino (Las Vegas, NV)
- Mille Fleurs (Rancho Santa Fe, CA)
- n/naka (Los Angeles, CA)
- Nahm Thai Cuisine (Alpharetta, GA)
- NAOE (Miami, FL)
- Natalie's at Camden Harbour Inn (Camden, ME)
- Nicholas (Red Bank, NJ)
- Noisette (Portland, OR)
- Noord (Philadelphia, PA)
- o ya (Boston, MA)
- Orchids at Palm Court (Cincinnati, OH)
- Peninsula Grill (Charleston, SC)
- Per Se (New York, NY)
- Rasika (Washington, DC)
- Restaurant August (New Orleans, LA)
- Restaurant Iris (Memphis, TN)
- Restaurant Lorena's (Maplewood, NJ)
- Rudy & Paco Restaurant & Bar (Galveston, TX)
- Ruth's Chris Steak House (Baton Rouge, LA)
- Saint Jacques French Cuisine (Raleigh, NC)
- Saison (San Francisco, CA)
- SeaBlue Restaurant & Wine Bar (North Myrtle Beach, SC)
- Seasons Restaurant - Four Seasons (Washington, DC)
- Senza (Chicago, IL)
- ShinBay (Scottsdale, AZ)
- Ski Tip Lodge (Keystone, CO)
- Sons & Daughters (San Francisco, CA)
- Splendido (Beaver Creek, CO)
- St. Francis Winery & Vineyards (Santa Rosa, CA)
- Talula's Garden (Philadelphia, PA)
- Tony's (St. Louis, MO)
- The French Laundry (Yountville, CA)
- The French Room (Dallas, TX)
- The Kitchen Restaurant (Sacramento, CA)
- The Painted Lady (Newberg, OR)
- The Refectory Restaurant & Bistro (Columbus, OH)

- Vernick Food & Drink (Philadelphia, PA)
- Vetri (Philadelphia, PA)

98.3 Best Service

The following are the winners of the 2013 Diners' Choice Award for Best Service:

- Acquerello (San Francisco, CA)
- Addison at The Grand Del Mar (San Diego, CA)
- Alexander's (Roanoke, VA)
- Arabellas Italian Ristorante (Winter Haven, FL)
- Artisanal Restaurant (Banner Elk, NC)
- Atera (New York, NY)
- Aubergine at L'Auberge Carmel (Carmel, CA)
- Bald Headed Bistro (Cleveland, TN)
- Bibou (Philadelphia, PA)
- Binkley's Restaurant (Cave Creek, AZ)
- Bistro L'Hermitage (Woodbridge, VA)
- Blue Hill at Stone Barns (Pocantico Hills, NY)
- Boca (Cincinnati, OH)
- Bones (Atlanta, GA)
- Boulevard Bistro (Elk Grove, CA)
- BV Tuscany Italian Restaurant (Teaneck, NJ)
- Café Baci (Sarasota, FL)
- Café Juanita (Kirkland, WA)
- Cafe Renaissance (Vienna, VA)
- Canlis (Seattle, WA)
- Caviar Russe (New York, NY)
- Chama Gaucha Brazilian Steakhouse (Downers Grove, IL)
- Charleston (Baltimore, MD)
- Charleston Grill (Charleston, SC)
- Chef Mavro (Honolulu, HI)
- Chez Francois (Vermilion, OH)
- Chez Nous French Restaurant (Humble, TX)
- Commis (Oakland, CA)
- Cottage Place Restaurant (Flagstaff, AZ)
- Daniel - Lounge Seating (New York, NY)
- Eleven Madison Park (New York, NY)
- Farmhouse Inn & Restaurant (Forestville, CA)
- Fearrington House Restaurant (Pittsboro, NC)
- Forage (Salt Lake City, UT)
- Genoa Restaurant (Portland, OR)
- goosefoot (Chicago, IL)
- Hamptons (Sumter, SC)
- Hannas Prime Steak (Rancho Santa Margarita, CA)

- Jens' Restaurant (Anchorage, AK)
- JUNGSIK (New York, NY)
- Kai - Sheraton Wild Horse Pass Resort (Chandler, AZ)
- L2O (Chicago, IL)
- L'Auberge Chez Francois (Great Falls, VA)
- La Belle Vie (Minneapolis, MN)
- La Grenouille (New York, NY)
- La Mer at Halekulani (Honolulu, HI)
- Le Bernardin (New York, NY)
- LJ's & The Kat Lounge (Hagerstown, MD)
- Manresa (Los Gatos, CA)
- Menton (Boston, MA)
- Mille Fleurs (Rancho Santa Fe, CA)
- n/naka (Los Angeles, CA)
- NAOE (Miami, FL)
- New York Prime Steakhouse (Myrtle Beach, SC)
- Nicholas (Red Bank, NJ)
- Norman's at the Ritz-Carlton Orlando (Orlando, FL)
- o ya (Boston, MA)
- ON20 (Hartford, CT)
- Orchids at Palm Court - Hilton Cincinnati Netherland Plaza (Cincinnati, OH)
- Palace Arms at the Brown Palace (Denver, CO)
- Peninsula Grill (Charleston, SC)
- Per Se (New York, NY)
- Restaurant Iris (Memphis, TN)
- Restaurant Lorena's (Maplewood, NJ)
- Rover's (Seattle, WA)
- Rudy & Paco Restaurant & Bar (Galveston, TX)
- Ruth's Chris Steak House (Baton Rouge, LA)
- Ruth's Chris Steak House (Lake Mary, FL)
- Ruth's Chris Steak House (Wilkes-Barre, PA)
- Ryan's Restaurant (Winston-Salem, NC)
- Saint Jacques French Cuisine (Raleigh, NC)
- Saison (San Francisco, CA)
- Second Empire Restaurant and Tavern (Raleigh, NC)
- Senza (Chicago, IL)
- St. John's Restaurant (Chattanooga, TN)
- Sterling's Seafood Steakhouse at Silver Legacy Resort Casino (Reno, NV)
- Terrapin Restaurant (Virginia Beach, VA)
- The Ashby Inn (Paris, VA)
- The Cellar Restaurant (Daytona Beach, FL)
- The Copper Door (Hayesville, NC)
- The Dining Room - Biltmore Estate (Asheville, NC)
- The French Laundry (Yountville, CA)

- The French Room (Dallas, TX)
- The Grill - The Ritz-Carlton (Naples, FL)
- The Hobbit (Orange, CA)
- The Inn at Turkey Hill (Bloomsburg, PA)
- The Kitchen Restaurant (Sacramento, CA)
- The Left Bank - Sanderling Resort (Duck, NC)
- The Library Restaurant (Myrtle Beach, SC)
- The Melting Pot (Myrtle Beach, SC)
- The Melting Pot (Savannah, GA)
- The Painted Lady (Newberg, OR)
- The Ritz-Carlton Amelia Island - Salt, The Grill (Amelia Island, FL)
- The Steak House at Silver Reef (Ferndale, WA)
- The Tree Room @ Sundane (Sundance, UT)
- Tony's (St. Louis, MO)
- TRU (Chicago, IL)
- Vetri (Philadelphia, PA)
- White Barn Inn (Kennebunkport Beach, ME)
- Woodfire Grill (Atlanta, GA)
- Yono's Restaurant (Albany, NY)

98.4 Brunch

The following are the winners of the 2013 Diners' Choice Award for Best Brunch:

- 94th Aero Squadron (Miami, FL)
- 94th Aero Squadron (San Diego, CA)
- Allgauer's (Lisle, IL)
- Atchafalaya Restaurant (New Orleans, LA)
- B Matthews Eatery (Savannah, GA)
- Bananas Modern American Diner (Orlando, FL)
- Beau Monde (Philadelphia, PA)
- Belga Cafe (Washington, DC)
- Bella Vista at Four Seasons Resort The Biltmore (Santa Barbara, CA)
- Bernardo's @ the Hotel Galvez (Galveston, TX)
- Big Jones (Chicago, IL)
- Biltmore Brunch (Coral Gables, FL)
- Bistro La Bon (Charlotte, NC)
- Bixby's (St. Louis, MO)
- Brockton Villa (La Jolla, CA)
- Cafe Fleuri (Boston, MA)
- Cafe Modern (Fort Worth, TX)
- Cafe Monte (Charlotte, NC)
- Café Sebastienne (Kansas City, MO)
- Chateau Morrisette (Floyd, VA)
- Chez Zee (Austin, TX)

- Circle Brunch - The Breakers (Palm Beach, FL)
- Circular Dining Room at The Hotel Hershey (Hershey, PA)
- Cookshop (New York, NY)
- Cooperage Inn Restaurant (Baiting Hollow, NY)
- Corner Stop Cafe (New York, NY)
- Croc's 19th Street Bistro (Virginia Beach, CA)
- Croissants Bistro and Bakery (Myrtle Beach, CA)
- Datz (Tampa, FL)
- Deerfield (Newark, DE)
- Deerpark Restaurant (Asheville, NC)
- Di Valletta Restaurant (Greensboro, NC)
- Einstein's (Atlanta, GA)
- Ellyngton's at the Brown Palace (Denver, CO)
- Envoy (Milwaukee, WI)
- French Blue - St. Helena (Saint Helena, CA)
- Garden Court (San Francisco, CA)
- Garden Terrace at The Inverness Hotel (Englewood, CO)
- Gertrude's at the Baltimore Museum of Art (Baltimore, MD)
- Gramercy Terrace (New York, NY)
- Hawaii Prince - Prince Court (Honolulu, HI)
- Hillbilly Tea (Louisville, KY)
- Humphreys Restaurant (San Diego, CA)
- Jane (New York, NY)
- Kravings (Tarzana, CA)
- La Note Restaurant Provencal (Berkeley, CA)
- Lake Elmo Inn (Lake Elmo, MN)
- Lake Rabun Hotel and Restaurant (Lakemont, GA)
- Las Brisas (Laguna Beach, CA)
- Library Bistro (Seattle, WA)
- Lucile's (Fort Worth, TX)
- M ST. Café (Saint Paul, MN)
- Magic Flute (San Francisco, CA)
- MAX's Wine Dive (Houston, TX)
- Mister Collins (Bal Harbour, FL)
- Mountain View Restaurant at Cheyenne Mountain Resort (Colorado Springs, CO)
- Mrs. K's Toll House (Silver Spring, MD)
- Museum Cafe (Oklahoma City, OK)
- Nellie's Sports Bar (Washington, DC)
- Norma's at Le Parker Meridien (New York, NY)
- North End Cafe (Louisville, KY)
- O'Neill's Bar & Grill (Mission Viejo, CA)
- Oasis Cafe (Salt Lake City, UT)
- Palm Court at The Scottsdale Resort (Scottsdale, AZ)
- Parks Edge (Atlanta, GA)

- Parrot Cage - Washburne Culinary Institute (Chicago, IL)
- Pasha Mezze (Norfolk, VA)
- Pastis (New York, NY)
- Peacock Garden Cafe (Coconut Grove, FL)
- Petit Chou (Carmel, IN)
- Plumeria Beach House (Kahala, HI)
- Ports O Call (San Pedro, CA)
- Queen Mary Champagne Sunday (Long Beach, CA)
- RESTAURANT at Sunset Marquis (West Hollywood, CA)
- Rosebud (Atlanta, GA)
- Salt's at Redondo Beach (Des Moines, WA)
- Salty's on Alki (Seattle, WA)
- Sanfords Restaurant (Astoria, NY)
- Sarabeth's Central Park South (New York, NY)
- Sarabeth's West (New York, NY)
- Seasons Restaurant (Washington, DC)
- Soco (Brooklyn, NY)
- Sophia's Restaurant at The Fairview Inn (Jackson, MS)
- South End Buttery (Boston, MA)
- Sun in my Belly - Neighborhood Cafe (Decatur, GA)
- Sundy House (Delray Beach, FL)
- Ted's Bulletin (Washington, DC)
- The Café at The Ritz-Carlton Buckhead (Atlanta, GA)
- The Crystal Room at Le Pavilion Hotel (New Orleans, LA)
- The Dining Room at Salish Lodge & Spa (Snoqualmie, WA)
- The Greenbriar Inn (Boulder, CO)
- The Roycroft Inn (East Aurora, NY)
- The Smith - East Village (New York, NY)
- TJ's at The Jefferson Hotel (Richmond, VA)
- Tom Hams Lighthouse (San Diego, CA)
- Top of the Mark (San Francisco, CA)
- Town Hall (Washington, DC)
- Valley Green Inn (Philadelphia, PA)

98.5 Fit For Foodies Restaurants

The following are the winners of the 2013 Diners' Choice Award for the top Fit for Foodies Restaurant:

- A(Muse.) (Rehoboth Beach, DE)
- Acadia (Chicago, IL)
- All Spice - San Mateo (San Mateo, CA)
- Altura (Seattle, WA)
- Art Cafe 26 (Williamsburg, VA)
- Autre Monde (Berwyn, IL)

- Aviary (Portland, OR)
- Bar Lola - Portland (Portland, ME)
- Barley Swine (Austin, TX)
- Beast (Portland, OR)
- Beast and Bottle (Denver, CO)
- Belly and Trumpet (Dallas, TX)
- Benu (San Francisco, CA)
- Bibou (Philadelphia, PA)
- Bink's Midtown (Phoenix, AZ)
- Binkley's Restaurant (Cave Creek, AZ)
- Blue Hill at Stone Barns (Pocantico Hills, NY)
- BOCA (Cincinnati, OH)
- Canyon Kitchen (Sapphire, NC)
- Carpe Vino 21+ Establishment (Auburn, CA)
- Cascina Spinasse (Seattle, WA)
- Castagna (Portland, OR)
- Chalkboard (Healdsburg, CA)
- Commis (Oakland, CA)
- Craigie on Main (Cambridge, MA)
- Crossroads (Los Angeles, CA)
- Crudo (Phoenix, AZ)
- Cúrate (Asheville, NC)
- Driftwood (Dallas, TX)
- Farmhouse Inn & Restaurant (Forestville, CA)
- Feast (New York, NY)
- FIG (Charleston, SC)
- Fishing with Dynamite (Manhattan Beach, CA)
- Five Bistro (St. Louis, MO)
- Forage (Salt Lake City, UT)
- Fore Street (Portland, ME)
- Frances (San Francisco, CA)
- Girasol (Studio City, CA)
- Girl & the Goat (Chicago, IL)
- goosefoot (Chicago, IL)
- Gracie's (Providence, RI)
- Grove (Grand Rapids, MI)
- Gwynnett St (Brooklyn, NY)
- Heidi's Minneapolis (Minneapolis, MN)
- Highlands Bar & Grill (Birmingham, AL)
- How to Cook A Wolf (Seattle, WA)
- Hugo's Restaurant (Portland, ME)
- Husk (Nashville, TN)
- iNG Restaurant (Chicago, IL)
- ink. (Los Angeles, CA)

- IRON at Marcus Pointe (Pensacola, FL)
- Juno (Chicago, IL)
- Kabocha (Chicago, IL)
- Le Pigeon (Portland, OR)
- Lenoir Restaurant (Austin, TX)
- Little Fish (Philadelphia, PA)
- Maison (Lancaster, PA)
- Manresa (Los Gatos, CA)
- Moto Restaurant (Chicago, IL)
- n/naka (Los Angeles, CA)
- Natural Selection (Portland, OR)
- Niche (Clayton, MO)
- o ya (Boston, MA)
- Old Major (Denver, CO)
- Papilles (Los Angeles, CA)
- Piccolo (Minneapolis, MN)
- Playground (Santa Ana, CA)
- Poppy (Seattle, WA)
- Posh (Scottsdale, AZ)
- Primo (Rockdale, ME)
- Restaurant Alma (Minneapolis, MN)
- Roe (Portland, OR)
- Root (New Orleans, LA)
- Saison (San Francisco, CA)
- Sbraga (Philadelphia, PA)
- Serpico (Philadelphia, PA)
- Seven Sows Bourbon and Larder (Asheville, NC)
- ShinBay (Scottsdale, AZ)
- Shorebreak Lodge (Rehoboth Beach, DE)
- Sir and Star at the Olema (Olema, CA)
- Sons & Daughters (San Francisco, CA)
- Spur Gastropub (Seattle, WA)
- Staple & Fancy Mercantile (Seattle, WA)
- Takashi (Chicago, IL)
- The Bocuse Restaurant at The Culinary Institute of America (Hyde Park, NY)
- The Farm and Fisherman (Forestville, CA)
- The Grove (Delary Beach, FL)
- The North Fork Table & Inn (Southold, NY)
- The Pass (Houston, TX)
- The Pickled Heron (Philadelphia, PA)
- The Pullman (Glenwood Springs, CO)
- The Restaurant at Meadowood (Saint Helena, CA)
- The Smoking Goat Restaurant (San Diego, CA)
- The Squeaky Bean (Denver, CO)

- Tilth (Seattle, WA)
- Uptown Billiards Club (Portland, OR)
- Vedge (Philadelphia, PA)
- Vernick Food & Drink (Philadelphia, PA)
- Vetri (Philadelphia, PA)
- Woodfire Grill (Atlanta, GA)

98.6 Hot Spots

The 2013 Diners' Choice Award for top Hot Spot (which recognizes hip restaurants, celebrity chefs, and avant-garde restaurateurs) are as follows:

- Ada Street (Chicago, IL)
- B.B. King's Blues Club (Memphis, TN)
- Bâoli Miami (Miami Beach, FL)
- Bavettes (Chicago, IL)
- Beauty and Essex (New York, NY)
- Bestia (Los Angeles, CA)
- BOA Steakhouse - Sunset (Hollywood, CA)
- Buccan (Palm Beach, FL)
- Buddakan NY (New York, NY)
- Buddha Sky Bar (Delray Beach, FL)
- Campo (Reno, NV)
- Catch (New York, NY)
- Cavo (Astoria, NY)
- Chambers Eat + Drink (San Francisco, CA)
- Chino Latino (Minneapolis, MN)
- Cleo - SBE (Los Angeles, CA)
- Del Frisco's Double Eagle Steak House (Chicago, IL)
- Del Frisco's Grille - McKinney Ave. (Dallas, TX)
- Departure Restaurant and Lounge (Portland, OR)
- do Restaurant at the View (Atlanta, GA)
- El Vez (Philadelphia, PA)
- Firefly Tapas Kitchen & Bar Henderson (Henderson, NV)
- Fly Bar & Restaurant (Tampa, FL)
- FT33 (Dallas, TX)
- Gilt Bar (Chicago, IL)
- Girl & the Goat (Chicago, IL)
- Grille One Sixteen - South Tampa (Tampa, FL)
- Hakkasan San Francisco (San Francisco, CA)
- Hendrick's Tavern (Roslyn, NY)
- Herringbone (La Jolla, CA)
- Hip Kitty Jazz & Fondue (Claremont, CA)
- Honu Kitchen and Cocktails (Huntington, NY)
- HUB 51 (Chicago, IL)

- ink. (Los Angeles, CA)
- Juvia (Miami, FL)
- Katana (West Hollywood, CA)
- Katsuya - Brentwood - SBE (Brentwood, CA)
- Katsuya - Hollywood - SBE (Los Angeles, CA)
- Lavo (Las Vegas, NV)
- Linger (Denver, CO)
- Lulu California Bistro (Palm Springs, CA)
- Manhattan Beach Post (Manhattan Beach, CA)
- Mateo (Durham, NC)
- Mercato di Vetro (West Hollywood, CA)
- Miss Lily's (New York, NY)
- Monsoon Asian Kitchen & Lounge (Babylon, NY)
- MUA (Oakland, CA)
- N9NE Steakhouse Las Vegas (Las Vegas, NV)
- Nada (Cincinnati, OH)
- nopa (San Francisco, CA)
- Ouzo Bay (Baltimore, MD)
- Palmilla Cocina Y Tequila (Hermosa Beach, CA)
- Paris Club (Chicago, IL)
- Playground (Santa Ana, CA)
- Prato - Winter Park (Winter Park, FL)
- Provisions (Houston, TX)
- Red Ginger at Traverse City (Traverse City, MI)
- Red Lantern (Boston, MA)
- Restaurant IPO (Baton Rouge, LA)
- Rocco's Tacos & Tequila Bar (Fort Lauderdale, FL)
- Rocco's Tacos & Tequila Bar (West Palm Beach, FL)
- RPM Italian (Chicago, IL)
- Searsucker (San Diego, CA)
- Searsucker (Scottsdale, AZ)
- Soco (Brooklyn, NY)
- STK - Los Angeles (West Hollywood, CA)
- STK - Miami (Miami, FL)
- STK - NYC - Meatpacking (New York, NY)
- STK - The Cosmopolitan of Las Vegas (Las Vegas, NV)
- Sub Zero Vodka Bar (St. Louis, MO)
- Sugarcane raw bar grill (Miami, FL)
- Sunda (Chicago, IL)
- Sushi POP (Oviedo, FL)
- Sushi Roku - Scottsdale (Scottsdale, AZ)
- SushiSamba dromo (Miami Beach, FL)
- SushiSamba strip (Las Vegas, NV)
- Tao (New York, NY)

- Tao Restaurant and Nightclub (Las Vegas, NV)
- The Bazaar by José Andrés (Los Angeles, CA)
- The Bazaar by José Andrés at SLS Hotel South Beach (Miami Beach, FL)
- The Boarding House (Chicago, IL)
- The Food Market (Baltimore, MD)
- The Hurricane Club (New York, NY)
- The Macinosh (Charleston, SC)
- The Office (Delray Beach, FL)
- The Spence (Atlanta, GA)
- The Stanton Social (New York, NY)
- The Tasting Kitchen (Venice, CA)
- The Tropicale (Palm Springs, CA)
- Toku Modern Asian (Manhasset, NY)
- Trio Restaurant (Palm Springs, CA)
- Tsunami Shaw Center (Baton Rouge, LA)
- TWO Urban Licks (Atlanta, GA)
- Untitled (Chicago, IL)
- Virago (Nashville, TN)
- Wang's in the Desert (Palm Springs, CA)
- Wynwood Kitchen and Bar (Miami, FL)
- Yardbird Southern Table & Bar (Miami Beach, FL)
- YOLO (Ft. Lauderdale, FL)
- Zuma Japanese Restaurant (Miami, FL)

98.7 Hottest Restaurant Bars

The following are the winners of the 2013 Diners' Choice Award for Hottest Restaurant Bars:

- 25 Lusk (San Francisco, CA)
- 333 Pacific-Steaks & Seafood (Oceanside, CA)
- 40/40 Club (New York, NY)
- A Restaurant (Newport Beach, CA)
- Bathtub Gin (New York, NY)
- Bond Street Social (Baltimore, MD)
- Bungalow 44 (Mill Valley, CA)
- Burlap (San Diego, CA)
- Burritt Room & Tavern-Mystic Hotel (San Francisco, CA)
- Chambers Eat + Drink (San Francisco, CA)
- Char Steakhouse (Red Bank, NJ)
- Chino Latino (Minneapolis, MA)
- Cibo Wine Bar (Miami, FL)
- City Tap House (Philadelphia, PA)
- Club Cafe (Boston, MA)
- Clydz (New Brunswick, NJ)

- Comstock Saloon (San Francisco, CA)
- Cuvee Bistro (Destin, FL)
- dbar (Dorchester, MA)
- Del Frisco's Grille (Dallas, TX)
- Del Frisco's Grille (Houston, TX)
- Delta's (New Brunswick, NJ)
- Departure Restaurant and Lounge (Portland, OR)
- do Restaurant at the View (Atlanta, GA)
- Eddie V's (Tampa, FL)
- El Vez (Philadelphia, PA)
- Empire (Boston, MA)
- Fly Bar & Restaurant (Tampa, FL)
- Geronimo (New Haven, CT)
- Ginny's Supper Club (New York, NY)
- Hal's Bar & Grill (Venice, CA)
- Henry's Tavern (Plano, TX)
- Holland House Bar & Refuge (Nashville, TN)
- Honu Kitchen and Cocktails (Huntington, NY)
- Jasper's Corner Tap and Kitchen (San Francisco, CA)
- Jerry Remy's Sports Bar and Grill (Fall River, MA)
- Jimmy's, An American Restaurant & Bar (Aspen, CO)
- Lost Society (Washington, DC)
- Macao Trading Company (New York, NY)
- Market Garden Brewery (Cleveland, OH)
- Mastro's Steakhouse (Palm Desert, CA)
- Meat & Potatoes (Pittsburgh, PA)
- Merchant (Madison, WI)
- Meritage-Warwick (East Greenwich, RI)
- Monsoon Asian Kitchen & Lounge (Babylon, NY)
- MUA (Oakland, CA)
- Mulberry Project (New York, NY)
- Nic's (Beverly Hills, CA)
- Nihon Whisky Lounge (San Francisco, CA)
- O-Ku (Charleston, SC)
- PARK Restaurant & Bar (Cambridge, MA)
- Park Tavern (Delray Beach, FL)
- Patria Restaurant and Mixology Lounge (Rahway, NJ)
- Prato (Winter Park, FL)
- Red Lantern (Boston, MA)
- Rocco's Tacos & Tequila Bar (Fort Lauderdale, FL)
- Rocco's Tacos & Tequila Bar (Orlando, FL)
- Rocco's Tacos & Tequila Bar (Palm Beach Gardens, FL)
- Rocco's Tacos & Tequila Bar (West Palm Beach, FL)
- Rooftop 120 (Glastonbury, CT)

- Rush Street (Culver City, CA)
- Saloon (Somerville, MA)
- SALT SEVEN (Delray Beach, FL)
- SanTan Brewing Co. (Chandler, AZ)
- Searsucker (San Diego, CA)
- Social Restaurant and Wine Bar (Charleston, SC)
- Sofrito-Midtown (New York, NY)
- Spoonbar - h2hotel (Healdsburg, CA)
- Stars Restaurant-Rooftop & Grill Room (Charleston, SC)
- Steel and Rye (Milton, MA)
- STK (Atlanta, GA)
- STK - The Cosmopolitan of Las Vegas (Las Vegas, NV)
- Stoddard's (Boston, MA)
- Stout Barrel House and Galley (Chicago, IL)
- Sub Zero Vodka Bar (St. Louis, MO)
- Tantalum (Long Beach, CA)
- Tao Restaurant and Night Club (Las Vegas, NV)
- Tavern Road (Boston, MA)
- The Brewer's Art (Baltimore, MD)
- The Cedars Social (Dallas, TX)
- The crow bar and kitchen (Corona Del Mar, CA)
- The Libertine Liquor Bar (Indianapolis, IN)
- The Nest (Indian Wells, CA)
- The New York Beer Company (New York, NY)
- The Pikey (Los Angeles, CA)
- The Social Club (Petaluma, CA)
- The Society Restaurant & Lounge (Silver Spring, MD)
- The Thomas at Fagiani's (Napa, CA)
- The Topsy Pig (San Francisco, CA)
- The Tropicale (Palm Springs, CA)
- Todd English P.U.B. (Las Vegas, NV)
- Tomatoes (Margate, NJ)
- TQLA (Houston, TX)
- Triumph Brewing Company (Philadelphia, PA)
- union: asian supper club (Delray Beach, CA)
- UNION Kitchen & Tap (Encinitas, CA)
- Untitled (Chicago, IL)
- Vines Grille and Wine Bar (Orlando, FL)
- Wang's in the Desert (Palm Springs, CA)
- YOLO (Fort Lauderdale, FL)

98.8 Most Notable Wine Lists

The following are the winners of the 2013 Most Notable Wine List Diners' Choice

Award:

- 20 Brix (Milford, OH)
- 20nine Restaurant & Wine Bar (San Antonio, TX)
- 360 Bistro (Nashville, TN)
- 3Twenty Wine Lounge (Los Angeles, CA)
- 4 Olives Restaurant (Manhattan, KS)
- Acquerello (San Francisco, CA)
- Addison at The Grand Del Mar (San Diego, CA)
- Aida Bistro & Wine Bar (Columbia, MD)
- Angelina's Ristorante (Bonita Springs, FL)
- Artisanal Restaurant (Banner Elk, NC)
- Aureole - Las Vegas (Las Vegas, NV)
- bacaro (Champaign, IL)
- Back Wine Bar & Bistro (Folsom, CA)
- Bin 17 (Hoboken, NJ)
- Bistro Blanc (Glenelg, MD)
- Bistro Vis À Vis (Greenbrae, CA)
- Boiler Room (Omaha, NE)
- Bonterra (Charlotte, NC)
- Buckheads (Richmond, VA)
- Canlis (Seattle, CA)
- Carpe Vino (21+ Establishment) (Auburn, CA)
- Charleston (Baltimore, MD)
- Chez Francois (Vermillion, IL)
- Cinghiale - Enoteca Wine Bar (Baltimore, MD)
- Cooper's Hawk Winery & Restaurant (Indianapolis, IN)
- Cooper's Hawk Winery & Restaurant (Kansas City, MO)
- Cork Restaurant (Chandler, AZ)
- Corner Wine Bar (Indianapolis, IN)
- Cuvee Wine & Bistro (Ocala, FL)
- DOC Wine Bar (Lombard, IL)
- Domaine Hudson (Wilmington, DE)
- Dusty's Wine Bar (Okemos, MI)
- Eno Vino Wine Bar and Bistro (Madison, WI)
- Enotria (Sacramento, CA)
- Fearrington House Restaurant (Pittsboro, NC)
- Fleming's Prime Steakhouse & Wine Bar (West Hartford, CT)
- Flyte World Dining & Wine (Nashville, TN)
- Frasca Food and Wine (Boulder, CO)
- Griffin Market (Beaufort, SC)
- Hampton Street Vineyard (Columbia, SC)
- In Vivo Wine Bar & Restaurant (New York, NY)
- Iron Bridge Wine Company - Columbia (Columbia, MD)
- Iron Bridge Wine Company - Warrenton (Warrenton, VA)

- Los Olivos Wine Merchant & Cafe (Los Olivos, CA)
- Louie's Wine Dive (Kansas City, MO)
- Marche Bacchus (Las Vegas, NV)
- Marinus - Bernardus Lodge (Carmel Valley, CA)
- MAX's Wine Die (Austin, TX)
- Mercy Wine Bar (Dallas, TX)
- Mike's Wine Dive (Wichita, KS)
- Nosh Wine Lounge (Omaha, NE)
- Noto's Old World Italian Dining (Grand Rapids, MI)
- Novita Wine Bar Trattoria (Garden City, NY)
- On The Square (Tarboro, NC)
- Pairings Bistro (Bel Air, MD)
- Red Fish Restaurant (Hilton Head Island, SC)
- Red House (Renton, WA)
- Restaurant Guy Savoy - Caesars Palace (Las Vegas, NV)
- Riccardo's (Lake Oswego, OR)
- Ristorante Panorama (Philadelphia, PA)
- Robust (Webster Groves, MO)
- Sbrocco (Des Moines, IA)
- SeaBlue Restaurant & Wine Bar (North Myrtle Beach, SC)
- Sip Restaurant (Issaquah, WA)
- Soif Wine Bar Restaurant (Santa Cruz, CA)
- Sonoma Wine Bar & Bistro (Virginia Beach, VA)
- St. Vincent (San Francisco, CA)
- Tannin Wine Bar and Kitchen (Kansas City, MO)
- Tastings Wine Bar and Bistro (Foxboro, MA)
- TOAST Enoteca & Cucina (San Diego, CA)
- Troquet (Boston, MA)
- UPSTAIRS 2 (Los Angeles, CA)
- The 3rd Corner Wine Shop & Bistro (Palm Desert, CA)
- The Barrel Room at City Winery (New York, NY)
- The Barrel Room at Two 40 South (Brea, CA)
- The Cellar (Corning, NY)
- The Cellar Restaurant (Daytona Beach, FL)
- The Curious Grape (Arlington, VA)
- The French Laundry (Yountville, CA)
- The Hobbit (Orange, CA)
- The Joel Palmer House (Dayton, OR)
- The Refectory Restaurant & Bistro (Columbus, OH)
- The Royce at the Langham (Pasadena, CA)
- The Tasting Room - Kings Harbor (Kingwood, TX)
- The Tasting Room Wine & Tapas (St. Augustine, FL)
- The Vineyard Wine Bar (Havre De Grace, MD)
- The Wine Bistro - Clintonville (Columbus, OH)

- The Wine Bistro - Worthington (Columbus, OH)
- The Wine Kitchen on the Creek (Frederick, MD)
- The Winery Restaurant & Wine Bar (Tustin, CA)
- The WineSellar & Brasserie (San Diego, CA)
- Undici (Rumson, NJ)
- UPSTAIRS 2 (Los Angeles, CA)
- Veritas (New York, NY)
- Vines Grille and Wine Bar (Orlando, FL)
- Vinology Ann Arbor (Ann Arbor, MI)
- Wine Cask (Santa Barbara, CA)
- Wine Experience Cafe and World Cellar (Aurora, CO)
- Zoes Steak & Seafood (Virginia Beach, VA)

98.9 Most Romantic Restaurants

The following are the winners of the 2013 Diners' Choice Award for Most Romantic Restaurant:

- Acquerello (San Francisco, CA)
- Addison at The Grand Del Mar (San Diego, CA)
- Alizé at the Top of the Palms Casino Resort (Las Vegas, NV)
- Armani's (Tampa, FL)
- Basil's Restoran (Narragansett, RI)
- Beach Walk Henderson Park Inn (Destin, FL)
- Bella...On The River (San Antonio, TX)
- Bertrand at Mister A's (San Diego, CA)
- Bouchard Restaurant and Inn (Newport, RI)
- Briarhurst Manor (Manitou Springs, CO)
- Brown's Beach House - The Fairmont Orchid - Kohala Coast (Kohala Coast, HI)
- Cacharel Restaurant (Arlington, TX)
- Café Central (El Paso, TX)
- Cafe Matisse (Rutherford, NJ)
- Cafe Renaissance (Vienna, VA)
- Canlis (Seattle, WA)
- Capische (Wailea, HI)
- Carmen on The Danforth (Portland, ME)
- Castle Falls (Oklahoma City, OK)
- Chez Francois - Vermillion (Vermillion, OH)
- Chez Phillippe - Peabody Hotel Memphis (Memphis, TN)
- Different Pointe of View (Phoenix, AZ)
- Eagle's Nest - Hyatt Regency Indianapolis (Indianapolis, IN)
- Equus @ The Castle on the Hudson (Tarrytown, NY)
- Farmhouse Inn & Restaurant (Forestville, CA)
- Fearington House Restaurant (Pittsboro, NC)
- Ferraro's Bar e Ristorante Maui (Wailea, HI)

- Flagstaff House (Boulder, CO)
- Fleur de Lys (San Francisco, CA)
- Geja's Café (Chicago, IL)
- Genoa Restaurant (Portland, OR)
- Gibraltar (Miami, FL)
- Goldmoor Restaurant (Galena, IL)
- Il Cielo Gardens Restaurant & Bar (Beverly Hills, CA)
- Isabela on Grandview (Pittsburg, PA)
- Kai - Sheraton Wild Horse Pass Resort (Chandler, AZ)
- Kameula Provision Co. (Waikoloa, HI)
- L'Auberge Restaurant on Oak Creek (Sedona, AZ)
- La Caille Restaurant (Sandy, UT)
- La Mer at Halekulani (Honolulu, HI)
- LA Prime at The Westin Bonaventure Hotel (Los Angeles, CA)
- Latitudes (Key West, FL)
- Left Bank - The Sanderling Resort (Duck, NC)
- Log Haven (Salt Lake City, UT)
- Madrona Manor (Healdsburg, CA)
- McNinch House (Charlotte, NC)
- Michael's - South Point Casino (Las Vegas, NV)
- Michel's at the Colony Surf (Honolulu, HI)
- Mona Lisa Fondue Restaurant (Manitou Springs, CO)
- Nikolai's Roof (Atlanta, GA)
- On The Marsh Bistro (Kennebunkport, ME)
- One if by Land, Two if by Sea (New York, NY)
- Orchids at Palm Court (Cincinnati, OH)
- Pamplemousse Le Restaurant (Las Vegas, NV)
- Peter Shields Inn (Cape May, NJ)
- Picasso - Bellagio (Las Vegas, NV)
- Primavista (Cincinnati, OH)
- Red Fish Grill (Miami, FL)
- Restaurant Iris (Memphis, TN)
- Ristorante Massimo (Portsmouth, NH)
- River Cafe (Brooklyn, NY)
- RM Champagne Salon (Chicago, IL)
- Romeo's Café (Miami, FL)
- Roof Restaurant (Salt Lake City, UT)
- Salacia - Prime Steak and Seafood (Virginia Beach, VA)
- Sarento's Top of the 'I' (Honolulu, HI)
- Seven Glaciers (Girdwood, AK)
- Shadowbrook Restaurant Capitola (Capitola, CA)
- Sir Winston's Aboard The Queen Mary (Long Beach, CA)
- Son's Maui at Swan Court - Hyatt Regency Maui (Lahaina, HI)
- Spindletop (Houston, TX)

- Stonehouse at San Ysidro Ranch (Santa Barbara, CA)
- Studio at Montage Laguna Beach (Laguna Beach)
- The Cellar - Fullerton (Fullerton, CA)
- The Cellar Restaurant (Daytona Beach, FL)
- The Cellars (Virginia Beach, VA)
- The Elkridge Furnace Inn (Elkridge, MD)
- The French Room (Dallas, TX)
- The Goodstone Inn & Estate Restaurant (Middleburg, VA)
- The Library Restaurant (Charleston, SC)
- The Little Door (Los Angeles, CA)
- The Manor House Restaurant (Casanova, VA)
- The Mansion at Nottoway Plantation (White Castle, LA)
- The Melting Pot (16 locations)
- The Old On The Green (New Marlboro, MA)
- The Painted Lady (Newberg, OR)
- The Refectory Restaurant & Bistro (Columbus, OH)
- The Sky Room (Long Beach, CA)
- The Spiced Pear (Newport, RI)
- The Studio, An Artistic Dining Experience (Hilton Head Island, SC)
- The Villa By Barton G (Miami Beach, FL)
- The Wentworth (Jackson, NH)
- Tidepools (Poipu, HI)
- Tree Room @ Sundance (Sundance, UT)
- 'Ulu Ocean Grill and Sushi Lounge (Kaupulehu, HI)
- V.Mertz (Omaha, NE)
- White Barn Inn (Kennebunk Beach, ME)
- Yamashiro (Hollywood, CA)
- Zenkichi (Brooklyn, NY)

98.10 Most Scenic Views

The following are the winners of the 2013 Diners' Choice Award for Restaurants with the Most Scenic Views:

- A Caprice (Tiburon, CA)
- ACQUA - Forest Lake (Forest Lake, MN)
- Allegheny Grille (Foxburg, PA)
- Baxter's Lakeside Grille (Lake Ozark, MO)
- Beach Walk Henderson Park Inn (Destin, FL)
- Beachcomber Café - Crystal Cove (Newport Coast, CA)
- BeachHouse bar + grill (Kirkland, WA)
- Bertrand at Mister A's (San Diego, CA)
- Big Water Grille (Incline Village, NV)
- Boat House Waterfront Dining (Tiverton, RI)
- Brockton Villa (La Jolla, CA)

- Canlis (Seattle, WA)
- Canyon Kitchen (Sapphire, NC)
- Castle Hill Inn (Newport, RI)
- Chart House Restaurant - Lake Tahoe (Lake Tahoe, NV)
- Chart House Restaurant - Portland (Portland, TX)
- Chart House Restaurant - Redondo Beach (Redondo Beach, CA)
- Chart House Restaurant - Towers of the Americas (San Antonio, TX)
- Chart House Restaurant - Weehawken (Weehawken, NJ)
- Chateau Morrisette (Floyd, VA)
- Chelsea's Chowder House (Long Beach, CA)
- Coach Insignia (Detroit, MI)
- Crow's Nest - Hotel Captain Cook (Anchorage, AZ)
- Cusp Dining & Drinks (La Jolla, CA)
- Different Pointe of View (Phoenix, AZ)
- Dockside Restaurant on York Harbor (York Harbor, ME)
- Edgewood Restaurant (Stateline, NV)
- Eiffel Tower (Las Vegas NV)
- Five Sixty by Wolfgang Puck (Dallas, TX)
- Flagstaff House (Boulder, CO)
- George's Ocean Terrace (La Jolla, CA)
- Harbor House (Milwaukee, WI)
- Harbour Lights (Saint Michaels, MD)
- Hemingway's Restaurant - Bay Bridge Marina (Stevensville, MD)
- High Finance Restaurant - At the top of the Tram (Albuquerque, NM)
- Highlawn Pavilion (West Orange, NJ)
- Isabela on Grandview (Pittsburgh, PA)
- James Landing Grille at the Marina (Williamsburg, VA)
- Kentmorr Restaurant (Stevensville, MD)
- Kimball's Kitchen (Duck, NC)
- La Marina (New York, NY)
- Landfall Restaurant (Woods Hole, MA)
- Las Brisas (Laguna Beach, CA)
- Le Vigne at Montaluce Winery (Dahlongega, GA)
- Lighthouse Sound (Bishopville, MD)
- Mandarin Bar - Mandarin Oriental Las Vegas (Las Vegas, NV)
- McLoone's Pier House (Long Branch, NJ)
- Michael's Steak Chalet (Osage Beach, MO)
- Monterey Bay Fish Grotto (Mt. Washington, PA)
- Moonshadows (Malibu, CA)
- Noble Rot (Portland, OR)
- North Shore Grill (Lakeville, NY)
- Ocean (Kennebunkport, ME)
- Old Fort Pub (Hilton Head, SC)
- ON20 (Hartford, CT)

- Orange County Mining Co. (Santa Ana, CA)
- Pacific's Edge (Carmel, CA)
- Palisade (Seattle, WA)
- Pier 45 (Rochester, NY)
- Portland City Grill (Portland, OR)
- Primavista (Cincinnati, OH)
- Quartet (Portland, OR)
- R Lounge at Two Times Square (Manhattan, NY)
- Rhumb Line (Ventura, CA)
- River Crab - St. Clair (St. Clair, MI)
- River's End (Jenner, CA)
- Roof Restaurant (Salt Lake City, UT)
- Salute E Vita Ristorante (Richmond, CA)
- Sandiago's Mexican Grill (Albuquerque, MN)
- Sarento's Top of the "I" (Honolulu, HI)
- Sea Venture (Pismo Beach, CA)
- Seaglass Restaurant and Lounge (Salisbury, MA)
- Seven Glaciers (Anchorage, AK)
- Severn Inn (Annapolis, MD)
- Sierra Mar - Post Ranch Inn (Big Sur, CA)
- Six Seven Restaurant & Lounge (Seattle, WA)
- Skates on the Bay (Berkeley, CA)
- SkyCity Restaurant at the Space Needle (Seattle, WA)
- Stone Cliff Inn (Carver, OR)
- Summit House Restaurant - Seattle (Enumclaw, WA)
- Sundial Restaurant at the Westin Peachtree (Atlanta, GA)
- Sunset Terrace - Grove Park Inn (Asheville, NC)
- Sutro's at the Cliff House (San Francisco, CA)
- Table at Crestwood (Boone, NC)
- The Celestial Steakhouse (Cincinnati, OH)
- The Gelston House (East Haddam, CT)
- The Grandview Restaurant and Lounge at The Geneva Inn (Lake Geneva, WI)
- The Hobbit Restaurant (Ocean City, MD)
- The Marine Room (La Jolla, CA)
- The Restaurant at Alderbrook (Union, WA)
- The Spinnaker (Sausalito, CA)
- The View Restaurant at Mirror Lake (Lake Placid, NY)
- Tom Hams Lighthouse (San Diego, CA)
- Top of the Hub (Boston, MA)
- Top of the Point (West Palm Beach, FL)
- Top of the Riverfront - Millennium Hotel (St. Louis, MO)
- Top of the World Restaurant - Stratosphere Hotel (Las Vegas, NV)
- Topside Waterfront Restaurant (Hilton Head, SC)
- Twenty Eight Atlantic at Wequassett Resort (East Harwich, MA)

- 'Ulu Ocean Grill and Sushi Lounge (Kaupulehu, HI)
- View (Oakdale, NY)
- West Shore Cafe (Homewood, CA)
- Wind & Sea Restaurant (Dana Point, CA)

98.11 Outdoor Dining

The following are the winners of the 2013 Diners' Choice Award for Best Outdoor Dining:

- Auberge du Soleil (Rutherford, CA)
- Beach Tree at the Hualalai (Kaupulehu, HI)
- Beachcomber Cafe - Crystal Cove (Newport Coast, CA)
- Bella Vista at Four Seasons The Biltmore Santa Barbara (Santa Barbara, CA)
- Belmont Brewing Company (Long Beach, CA)
- Blue Agave Club (Pleasanton, CA)
- Blue Dragon Restaurant (Kamuela, HI)
- Blue Moon Fish Co. (Fort Lauderdale, FL)
- Boat House Waterfront Dining (Tiverton, RI)
- Brockton Villa (La Jolla, CA)
- Brown's Beach House - The Fairmont Orchid (Kohala Coast, HI)
- Cafe Amelie (New Orleans, LA)
- Cafe Jardin at Sherman Gardens (Corona Del Mar, CA)
- Cafe Malaga (McKinney, TX)
- Cafe Sambal - Mandarin Oriental Miami (Miami, FL)
- Cafe Secret (Del Mar, CA)
- Caffè Riace (Palo Alto, CA)
- Capische (Wailea, HI)
- Carbon Beach Club Restaurant @ Malibu Beach Inn (Malibu, CA)
- Chart House Restaurant (Ft. Lauderdale, FL)
- Citron at the Viceroy Palm Springs (Palm Springs, CA)
- Coliseum Pool & Grill - The Resort at Pelican Hill (Newport Coast, CA)
- Corks at Russian River Vineyards (Forestville, CA)
- Crazy About You (Miami, FL)
- Dada (Delray Beach, FL)
- Deck 84 (Delray Beach, FL)
- Duke's Beach House Maui (Lahaina, HI)
- El Chorro (Paradise Alley, AZ)
- Ferraro's Bar e Ristorante Maui (Wailea, HI)
- Fuego - Maya Hotel (Long Beach, CA)
- Gannon's (Wailea, HI)
- Gaylord's at Kilohana (Lihue, HI)
- Geoffrey's Restaurant (Malibu, CA)
- George's Ocean Terrace (La Jolla, CA)
- Gram & Dun (Kansas City, MO)

- Hau Tree Lanai (Honolulu, HI)
- Highland's Garden Cafe (Denver, CO)
- House of Tricks (Tempe, AZ)
- Hula Grill - Kaanapali (Lahaina, HI)
- Island Lava Java Bistro (Kailua, HI)
- Jake's (Palm Springs, CA)
- Japengo - Maui (Lahina, HI)
- JB's On The Beach (Deerfield Beach, FL)
- JRDN Restaurant (San Diego, CA)
- Kamuela Provision Co. (Waikoloa, HI)
- L'Appart Resto (San Anselmo, CA)
- L'Auberge Restaurant on Oak Creek (Sedona, AZ)
- Las Campanas (Riverside, CA)
- Latitudes (Key West, FL)
- Lavender Bistro (La Quinta, CA)
- Le Diplomate (Washington, DC)
- Lon's at The Hermosa (Paradise Valley, AZ)
- Mantee Cafe (Studio City, CA)
- Marche Bacchus (Las Vegas, NV)
- Michael's Steak Chalet (Osage Beach, MO)
- Nine One Five (Key West, FL)
- Novo Restaurant (San Luis Obispo, CA)
- Oasis (Kapaa, HI)
- Oceans 234 (Deerfield Beach, FL)
- Ola at Turtle Bay (Kahuku, HI)
- Ophelia's on the Bay (Sarasota, FL)
- Pacific 'O (Lahaina, HI)
- Peacock Garden Cafe (Coconut Grove, FL)
- Perch LA (Los Angeles, CA)
- Pier 23 Cafe (San Francisco, CA)
- Pier 45 (Rochester, NY)
- Pietro's Italian Restaurant (Lodi, CA)
- Plantation Gardens (Koloa, HI)
- Plumeria Beach House (Kahala, HI)
- Portico Restaurant (Richmond, VA)
- Poseidon (Del Mar, CA)
- Red Fish Grill (Miami, FL)
- Red Hat on the River (Irvington, NY)
- RESTAURANT at Sunset Marquis (West Hollywood, CA)
- Rita's Kitchen at Camelback Inn, a J.W. Marriott Resort (Scottsdale, AZ)
- Rumors East (Nashville, TN)
- Rustic, Francis's Favorites (Geyersville, CA)
- Safari Room Restaurant (Newport, RI)
- Sam Choy's Kai Lanai (Kailua-Kona, HI)

- Sheerwater Restaurant at the Hotel Del Coronado (Coronado, CA)
- Sonoma Wine Garden (Santa Monica, CA)
- Spencer's Restaurant (Palm Springs, CA)
- Stone Brewing World Bistro & Garden (Escondido, CA)
- Stonehouse at San Ysidro Ranch (Santa Barbara, CA)
- Sunnyside (Tahoe City, CA)
- Sunset Terrace - Grove Park Inn (Asheville, NC)
- The Ivy (West Hollywood, CA)
- The Oak Steak and Seafood Grill (Patchogue, NY)
- The Restaurant at Ponte (Temecula, CA)
- The Turtle Club (Naples, FL)
- Tommy Bahama's Restaurant & Bar (Naples, FL)
- Tryst (Delray Beach, FL)
- 'Ulu Ocean Grill and Sushi Lounge (Kaupulehu, HI)
- Veranda Fireside Lounge & Restaurant (San Diego, CA)
- Villetta Brentwood (Santa Monica, CA)
- West Shore Cafe (Homewood, CA)
- Wilshire (Santa Monica, CA)
- Woodshed Smokehouse (Fort Worth, TX)
- Zin Bistro Americana (Westlake Village, CA)
- Zoubi (New Hope, PA)

98.12 Top American Cuisine

The following are the winners of the 2013 Diners' Choice Award for restaurants in the United States that specialize in American Cuisine:

- A Tote Heure (Cranford, NJ)
- Americano (Bratenahl, OH)
- Annie Gunn's (Chesterfield, MO)
- Annisa (New York, NY)
- Artisanal Restaurant (Banner Elk, NC)
- Aspen Grille (Myrtle Beach, SC)
- Bartlett Pear Inn (Easton, MD)
- Baxter's Lakeside Grille (Lake Ozark, MO)
- Bistro Vis À Vis (Greenbrae/Larkspur, CA)
- Blue Hill at Stone Barns (Pocantico Hills, NY)
- Bluestem (Kansas City, MO)
- BOCA (Cincinnati, OH)
- Bouquet Restaurant and Wine Bar (Covington, KY)
- Café Mahjaic-Lotus Inn (Lotus, CA)
- Café Matisse (Rutherford, NJ)
- Canoe (Atlanta, GA)
- Castagna (Portland, OR)
- Charleston (Baltimore, MD)

- Charleston Grill (Charleston, SC)
- Chef's Table at the Edgewater (Winter Garden, FL)
- Coldwater Café & Catering (Tipp City, OH)
- Colicchio & Sons-Main Dining Room (New York, NY)
- Communal (Provo, UT)
- Courtright's (Willow Springs, IL)
- Cuvee Bistro (Destin, FL)
- DANTE (Tremont, OH)
- Eleven Madison Park (New York, NY)
- Ellerbe Fine Foods (Fort Worth, TX)
- Elliott's on Linden (Pinehurst, NC)
- Fearing's (Dallas, TX)
- FIG (Charleston, SC)
- fire food and drink (Cleveland, OH)
- Flagstaff House (Boulder, CO)
- Flight Restaurant & Wine Bar (Memphis, TN)
- Grace (Fort Worth, TX)
- Gramercy Tavern (New York, NY)
- Grove (Grand Rapids, MI)
- Harper's Table (Suffolk, VA)
- Herons (Cary, NC)
- joan's in the Park (Saint Paul, MI)
- John Bentley's (Redwood City, CA)
- Jonathan at Gratz Park (Lexington, KY)
- K Restaurant (Orlando, FL)
- Lahaina Grill (Lahaina, HI)
- Lake Terrace-The Broadmoor (Colorado Springs, CO)
- Lilac (Billings, MT)
- LJ's & The Kat Lounge (Hagerstown, MD)
- Local Seasonal Kitchen (Ramsey, NJ)
- Lola-A Michael Symon Restaurant (Cleveland, OH)
- Masraff's (Houston, TX)
- Mica (Chestnut Hill, PA)
- Millwright's (Simsbury, CT)
- Milton's Cuisine and Cocktails (Alpharetta, GA)
- Mokomandy (Sterling, VA)
- Nana's Restaurant (Durham, NC)
- Niche (Clayton, MO)
- Ocean 235 (Easton, PA)
- Orchids at Palm Court (Cincinnati, OH)
- Paseo Grill (Oklahoma City, OK)
- Patti's 1880's Settlement (Grand Rivers, KY)
- Peli Peli (Houston, TX)
- Peninsula Grill (Charleston, SC)

- Per Se (New York, NY)
- Peter Shields Inn (Cape May, NJ)
- Pizzeria Seven Twelve (Orem, UT)
- Pura Vida by Brandt (Cleveland, OH)
- Ranch House Restaurant at Devil's Thumb Ranch (Tabernash, CO)
- Root Down (Denver, CO)
- Saddle Peak Lodge (Calabasas, CA)
- Seasons Restaurant - Four Seasons (Washington, DC)
- Senza (Chicago, IL)
- Sides Hardware and Shoes - A Brothers Restaurant (Los Olivos, CA)
- Silo Elevated Cuisine - 1604 (San Antonio, TX)
- Silo Elevated Cuisine - Alamo Heights (San Antonio, TX)
- Ski Tip Lodge (Keystone, CO)
- Splendido (Beaver Creek, CO)
- St. Johns' Restaurant (Chattanooga, TN)
- Story (Prairie Village, KS)
- Sullivan's Metropolitan Grill (Anderson, SC)
- Talula's Garden (Philadelphia, PA)
- The Artichoke Restaurant & Bar (Langley, OK)
- The Blue Ox (Lynn, MA)
- The Cellars (Virginia Beach, VA)
- The Classic Café (Roanoke, TX)
- The Flatiron Café (Omaha, NE)
- The French Laundry (Yountville, CA)
- The Mill at 2T (Tariffville, CT)
- The Parson's Table (Little River, SC)
- The Prime Rib (Baltimore, MD)
- The Restaurant at Patowmack Farm (Lovettsville, VA)
- The Root Restaurant & Bar (White Lake, MI)
- The Schoolhouse at Cannondale (Wilton, CT)
- The Settlers Inn (Hawley, PA)
- Tristan (Charleston, SC)
- Vernick Food & Drink (Philadelphia, PA)
- Vie (Western Springs, IL)
- VOLT (Frederick, MD)
- Washington Inn (Cape May, NJ)
- Whispers (Spring Lake, NJ)
- White Barn Inn (Kennebunk, ME)

DISTINGUISHED RESTAURANTS

99.1 Overview

Founded in 1990, the Distinguished Restaurants of North America (diRona; www.dirona.com) is a non-profit organization that seeks to promote fine dining by recognizing and promoting excellence in dining.

99.2 List Of Distinguished Restaurants 2013

Alabama

- Highlands Bar & Grill (Birmingham)

Alaska

- The Crow's Nest at Hotel Captain Cook (Anchorage)
- The Pump House Restaurant (Fairbanks)

Arizona

- Anthony's in the Catalinas (Tucson)
- Cartwright's Sonoran Ranch House (Cave Creek)
- Different Point of View (Phoenix)
- L'Auberge de Sedona (Sedona)
- Tonto Bar and Grill (Cave Creek)
- Uncle Sal's Italian Restaurant (Scottsdale)
- Wright's at the Biltmore Resort (Phoenix)

Arkansas

- Ashley's at the Capital (Little Rock)

California

- Acqua (San Diego)
- Acquerello (San Francisco)
- Alexander's Steakhouse (Cupertino)
- Anaheim White House Restaurant (Anaheim)
- Auberge du Soleil (Rutherford)
- Biba (Sacramento)
- Bistango (Irvine)

- C2 Steak & Seafood (Brooks)
- Domaine Chandon (Yountville)
- Donovan's Steak & Chop House (La Jolla)
- Duane's Prime Steaks & Seafood (Riverside)
- El Bizcocho Winery (San Diego)
- Fandango (Pacific Grove)
- Farallon (San Francisco)
- Fior d'Italia (San Francisco)
- First Cabin (Newport Beach)
- Five Crowns Restaurant (Corona del Mar)
- French Laundry (Yountville)
- Gennaro's Ristorante (Glendale)
- George's at the Cove (La Jolla)
- Grant Grill (San Diego)
- Harris' Restaurant (San Francisco)
- L'Olivier (San Francisco)
- La Folie (San Francisco)
- La Toque Restaurant (Napa)
- La Valencia Sky Room (La Jolla)
- Lark Creek Inn (Larkspur)
- Lawry's The Prime Rib (Beverly Hills)
- Le Central Bistro (San Francisco)
- Le Papillon (San Jose)
- Le Petit Chateau (North Hollywood)
- LG's Prime Steak House (Palm Desert)
- Manhattan Steak & Seafood (Orange)
- Mélisse Restaurant (Santa Monica)
- Michael's Restaurant (Santa Monica)
- Mille Fleurs (Rancho Santa Fe)
- Mr. Stox Restaurant (Anaheim)
- Musso and Frank Grill (Hollywood)
- Mustards Grill (Napa)
- Napa Rose (Anaheim)
- One Market Restaurant (San Francisco)
- Pacific's Edge (Carmel)
- Pacifica Seafood Restaurant (Palm Desert)
- Paolo's Restaurant (San Jose)
- Park Avenue Steaks & Chops (Stanton)
- Patina (Los Angeles)
- Postrio (San Francisco)
- The Cellar (Fullerton)
- The French Laundry (Yountville)
- The Grill on Hollywood (Hollywood)
- The Grill on the Alley (Beverly Hills)

- The Hobbit Restaurant (Orange, CA)
- The Marine Room (La Jolla)
- The Plumed Horse (Saratoga)
- The Restaurant at Wente Vineyards (Livermore)
- The Sardine Factory (Monterey)
- The Sky Room (Long Beach)
- The Winery at the District (Tustin)
- Tommy Toy's Cuisine Chinoise (San Francisco)
- Trader Vic's (Emeryville)
- Valentine Restaurant (Santa Monica)
- Wally's Desert Turtle (Rancho Mirage)
- Water Grill Restaurant (Los Angeles)

Colorado

- Beano's Cabin (Avon)
- Broker Restaurant (Denver)
- Brook's Steakhouse (Greenwood Village)
- Charles Court (Colorado Springs)
- Flagstaff House (Boulder)
- Larkspur Restaurant (Vail)
- Left Bank Restaurant (Vail)
- Ludwig's (Vail)
- Mirabelle Restaurant at Beaver Creek (Avon)
- Palace Arms at The Brown Palace Hotel (Denver)
- Restaurant Kevin Taylor (Denver)
- Strings (Denver)
- Syzygy (Aspen)
- Terra Bistro (Denver)
- The Cliff House Dining Room (Manitou Springs)
- The Penrose Room (Colorado Springs)
- The Tuscany (Denver)

Connecticut

- Bernard's (Ridgefield)
- Cavey's Restaurant (Manchester)
- Rebeccas (Greenwich)
- Restaurant Jean-Louis (Greenwich)

Delaware

- Columbus Inn (Wilmington)
- The Green Room (Wilmington)

District of Columbia

- 1789 Restaurant (Washington)
- 701 Restaurant (Washington)
- Bombay Club (Washington)
- Equinox Restaurant (Washington)
- i Ricchi (Washington)
- Kinkead's An American Brasserie (Washington)
- Marcel's (Washington)
- Michel Richard Citronelle (Washington)
- Smith & Wollensky (Washington)
- Taberna Del Alabardero (Washington)
- Teatro Goldoni (Washington)
- The Caucus Room (Washington)
- The Oceanaire Seafood Room (Washington)
- The Oval Room (Washington)
- The Prime Rib (Washington)

Florida

- 30 Degree Blue (Panama City Beach)
- 32 East (Delray Beach)
- 95 Cordova Restaurant and Cobalt Lounge (St. Augustine)
- Armani's at the Grand Hyatt Tampa Bay (Tampa)
- Arturo's Ristorante (Boca Raton)
- Atlantic's Edge at Cheeca Lodge & Spa (Islamorada)
- Bern's Steak House (Tampa)
- Bistro AIX (Jacksonville)
- Brooks Restaurant (Deerfield Beach)
- Cafe Cellini (Palm Beach)
- Café Chardonnay (Palm Beach Gardens)
- Cafe L'Europe (Palm Beach and Sarasota)
- Café Margaux (Cocoa)
- Capriccio Ristorante (Pembroke Pines)
- Chardonnay Restaurant (Naples)
- Charley's Aged Steaks & Market Fresh Fish (Tampa)
- Charley's Steak House (Orlando and Kissimmee)
- Chef Allen's (Aventura)
- Christini's Ristorante Italiano (Orlando)
- Columbia Restaurant (Tampa)
- Darrel & Oliver's Cafe' Maxx (Pompano Beach)
- Donatello (Tampa)
- Eduardo de San Angel (Ft. Lauderdale)
- Euphemia Haye (Longboat Key)
- Finz (Destin)
- FishBones (Lake Mary)

- Grill Room on Las Olas (Ft. Lauderdale)
- Johnnie's Hideaway (Orlando)
- Maison & Jardin (Altamonte Springs)
- Marina Cafe (Destin)
- Michael's on East (Sarasota)
- MoonFish (Orlando)
- Old Hickory Steakhouse (Kissimmee)
- Ristorante Paradiso (Lake Worth)
- Ruth's Chris Steak House (Orlando, North Palm Beach, and Winter Park)
- Seagar's Prime Steaks & Seafood (Destin)
- SideBerns (Tampa)
- Smith & Wollensky (Miami Beach)
- Square One Restaurant (Key West)
- Ta-boo' Restaurant (Palm Beach)
- Tantra Restaurant and Lounge (Miami Beach)
- The Black Pearl (Dunedin)
- The Boheme (Orlando)
- The Colony Dining Room (Longboat Key)
- The Flagler Steakhouse (Palm Beach)
- The Forge (Miami Beach)
- Vito's Chop House (Orlando)

Georgia

- Aqua Blue (Norcross)
- Aria (Atlanta)
- Bone's Restaurant (Atlanta)
- Hi Life Restaurant (Norcross)
- La Grotta Ristorante Italiano (Atlanta)
- Local 11ten Food and Wine (Savannah)
- Murphy's (Atlanta)
- Nikolai's Roof at The Hilton Atlanta (Atlanta)
- Sapphire Grill (Savannah)
- South City Kitchen Midtown (Atlanta)
- The Olde Pink House Restaurant (Savannah)

Hawaii

- Alan Wong's Restaurant (Honolulu)
- Bali by the Sea (Honolulu)
- Cafe' Portofino (Lihue)
- La Mer (Honolulu)
- Pahu i'a (Kailua-Kona)

Idaho

- Beverly's (Coeur d'Alene)

Illinois

- Carlucci (Rosemont)
- Chicago Chop House (Chicago)
- Cite' Elegant Dining (Chicago)
- Coco Pazzo (Chicago)
- Gene & Georgetti (Chicago)
- Gibson's Bar & Steakhouse (Chicago)
- Joe's Seafood, Prime Steak & Stone Crab (Chicago)
- Lawry's The Prime Rib (Chicago)
- Le Titi de Paris (Arlington Heights)
- Le Vichyssois (Lakemoor)
- Nieto's (Highland Park)
- Salpicón (Chicago)
- Smith & Wollensky (Chicago)
- The Grill on the Alley (Chicago)
- Va Pensiero (Evanston)
- Vivere (Chicago)

Iowa

- 801 Chophouse (Des Moines)
- Splash Seafood Bar & Grill (Des Moines)

Kentucky

- Equus Restaurant (Louisville)
- The Oakroom at the Seelbach Hotel (Louisville)
- Vincenzo's Italian Restaurant (Louisville)
- Winston's Restaurant (Louisville)

Louisiana

- Andrea's Restaurant (Metairie)
- Arnaud's Restaurant (New Orleans)
- Bayona (New Orleans)
- Bistro at Maison de Ville (New Orleans)
- Commander's Palace (New Orleans)
- Galatoire's Restaurant (New Orleans)
- GW Fins (New Orleans)
- Lafitte's Landing (Donaldsville and Darrow)
- Le Parvenu Restaurant (Kenner)
- Mr. B's Bistro (New Orleans)
- Ruth's Chris Steak House (Metairie)
- Stella! (New Orleans)
- Superiors Steakhouse (Shreveport)
- The Grill Room at the Windsor Court Hotel (New Orleans)

Maine

- Clay Hill Farm (York)
- The White Barn Inn (Kennebunkport)

Maryland

- Antrim 1844 (Taneytown)
- Da Mimmo (Baltimore)
- Della Notte Ristorante (Baltimore)
- Restaurant 213 (Fruitland)
- The Milton Inn (Sparks)

Massachusetts

- 75 Chestnut (Boston)
- Anthony's Pier 4 (Boston)
- Bravo (Boston)
- Chillingsworth (Brewster)
- Dan'l Webster Inn (Sandwich)
- Grill 23 & Bar (Boston)
- Il Capriccio Ristorante e Bar (Waltham)
- Òran Mór (Nantucket)
- Sonoma Restaurant (Princeton)
- The Summer House Restaurant (Siasconset)
- Top of the Hub (Boston)

Michigan

- Big Rock Chop House (Birmingham)
- La Bistecca Italian Grille (Plymouth)
- Opus One (Detroit)
- Ristorante Café Cortina (Farmington Hills)
- Schuler's Restaurant & Pub (Marshall)
- The English Inn Restaurant & Pub (Eaton Rapids)
- The Lark (West Bloomfield)
- The Rattlesnake Club (Detroit)
- The Whitney (Detroit)

Minnesota

- Lord Fletcher's Old Lake Lodge (Minnetonka)
- The St. Paul Grill (Saint Paul)

Mississippi

- BR Prime Steakhouse (Biloxi)
- Chicago Steakhouse at the Gold Strike Casino Resort (Tunica Resorts)
- Fairbanks Steakhouse (Tunica Resorts)

- Huntingtons Grille at the Hilton Jackson Hotel (Jackson)
- Jack Binion's Steak House (Tunica Resorts)

Missouri

- Al's Restaurant (St. Louis)
- Annie Gunn's (Chesterfield)
- dominic's (St. Louis)
- Dominic's Trattoria (St. Louis)
- Jasper's (Kansas City)
- John Mineo's Italian Restaurant (St. Louis)
- Station Grille Restaurant (St. Louis)
- Tony's of St. Louis (St. Louis)

Montana

- Rainbow Ranch Restaurant (Big Sky)

Nevada

- Adele's (Carson City)
- Alize at the Top of the Palms (Las Vegas)
- Andre's at the Monte Carlo Resort (Las Vegas)
- Ferraro's Restaurant (Las Vegas)
- Harrah's Steak House (Reno)
- La Strada (Reno)
- Le Cirque (Las Vegas)
- Mimmo Ferraro's Restaurant (Las Vegas)
- Mon Ami Gabi (Las Vegas)
- Peppermill's White Orchid (Reno)
- Picasso (Las Vegas)
- Piero's Italian Cuisine (Las Vegas)
- Romanza at the Peppermill (Reno)
- Roxy (Reno)
- Smith & Wollensky (Las Vegas)

New Hampshire

- Sugar Hill Inn (Sugar Hill)
- The Bedford Village Inn (Bedford)
- The Dining Room at Mt. Washington Resort (Bretton Woods)

New Jersey

- Highlawn Pavilion at Eagle Rock Reservation (West Orange)
- Knife & Fork Inn (Atlantic City)
- L'Allegria Restaurant (Madison)
- La Spiaggia (Ship Botton)
- Panico's (New Brunswick)

- Peregrine's (Atlantic City)
- Ram's Head Inn (Galloway)
- Ruth's Chris Steak House (Weehawken)
- The Bernard's Inn (Bernardsville)
- The Dining Room at the Hilton Short Hills (Short Hills)
- The Manor (West Orange)
- The Park Steak House (Park Ridge)
- The Saddle River Inn (Saddle River)

New Mexico

- Geronimo (Santa Fe)
- Rancher's Club of New Mexico Albuquerque)

New York

- 21 Club (New York)
- Alfama (New York)
- Aquavit (New York)
- Arabelle (New York)
- Aureole (New York)
- Barbetta (New York)
- Bobby Van's (New York)
- Bouley (New York)
- Caffè' on the Green (Whitestone)
- Daniel (New York)
- Del Frisco's Double Eagle Steak House (New York)
- Friends Lake Inn (Chestertown)
- Gallagher's Steak House (New York)
- Jack's Oyster House (Albany)
- Le Perigord (New York)
- Lenox Room (New York)
- Maloney & Porcelli (New York)
- Michael's (New York)
- Nicola's Restaurant (New York)
- Nobu (New York)
- One if by Land, Two if by Sea (New York)
- Park Avenue (New York)
- Piccolo Restaurant of Huntington (Huntington)
- Picholine (New York)
- Salvatore's Italian Gardens (Depew)
- Smith & Wollensky (New York)
- Sparks Steak House (New York)
- Terrace in the Sky (New York)
- The American Hotel (Sag Harbor)
- The Brewster Inn (Cazenovia)

- The Four Seasons (New York)
- The Living Room Restaurant at Maidstone Arms Inn (East Hampton)
- The Post House (New York)
- The River Cafe (Brooklyn)
- Tocqueville (New York)
- Tribeca Grill (New York)
- Union Square Cafe (New York)
- Xaviar's at Piermont (Piermont)
- Yono's Restaurant (Albany)

North Carolina

- Angus Barn (Raleigh)
- Bonterra Dining & Wine Room (Charlotte)
- Elizabeth's Cafe' & Winery (Duck)
- Horizons at Grove Park Inn (Asheville)
- Port Land Grill (Wilmington)
- Second Empire Restaurant & Tavern (Raleigh)
- The Capital Grille (Charlotte)
- The Dining Room, Inn on Biltmore Estate (Asheville)
- Upstream (Charlotte)

Ohio

- Alberini's (Niles)
- L'Auberge Restaurant (Dayton)
- Ristorante Giovanni's (Beachwood)
- The Palace Restaurant (Cincinnati)
- The Refectory (Columbus)

Oklahoma

- Polo Grill (Tulsa)

Oregon

- Genoa (Portland)
- Joel Palmer House (Dayton)
- RingSide Steakhouse Downtown (Portland)
- RingSide Steakhouse Glendoveer (Portland)
- The Painted Lady Restaurant (Newberg)

Pennsylvania

- Accomac Inn (York)
- Bricco (Harrisburg)
- Dilworthtown Inn (West Chester)
- DiSalvo's Station Restaurant (Latrobe)
- Finelli's Italian Villa (Altoona)

- Haydn Zug's Restaurant (East Petersburg)
- Hyeholde Restaurant (Moon Township)
- Isabela on Grandview (Pittsburgh)
- Restaurant Mazzi at the Inn of Leola Village (Leola)
- Ristorante La Buca (Philadelphia)
- Smith & Wollensky (Philadelphia)
- TÉ at The Inn at Leola Village (Leola)
- The Carlton (Pittsburgh)
- The Circular Dining Room at The Hotel Hershey (Hershey)
- Vallozzi's Restaurant (Greensburg)

Rhode Island

- Bouchard Restaurant & Inn (Newport)
- Capriccio (Providence)
- Providence Oyster Bar (Providence)
- Restaurant Bouchard (Newport)

South Carolina

- Charleston Grill (Charleston)
- Circa 1886 (Charleston)
- Cypress Lowcountry Grille (Charleston)
- Grill 225 (Charleston)
- Magnolia's (Charleston)
- Peninsula Grill (Charleston)
- Terra (West Columbia)
- The Restaurant at the Willcox (Aiken)

Tennessee

- Capriccio Grill (Memphis)
- Chez Philippe (Memphis)
- Folks Folly Prime Steak House (Memphis)
- Old Hickory Steakhouse (Nashville)
- Sunset Grill (Nashville)
- The Stock-Yard Restaurant (Nashville)
- The Troutdale Dining Room (Bristol)

Texas

- Abacus Restaurant (Dallas)
- Al Biernat's (Dallas)
- August E's (Fredericksburg)
- Bistro Le Cep (Houston)
- Bob's Steak & Chop House (Dallas)
- Bohanan's Prime Steaks & Seafood (San Antonio)
- Brennan's of Houston (Houston)

- Café Pacific (Dallas)
- Chez Nous French Restaurant (Humble)
- Christopher's World Grille (Bryan)
- Del Frisco's Double Eagle Steak House (Dallas)
- Fearing's Restaurant at The Ritz Carlton (Dallas)
- Fig Tree (San Antonio)
- Ill Forks (Dallas)
- Jasper's (Plano)
- Jeffrey's Restaurant (Austin)
- La Colombe d'Or Hotel & Restaurant (Houston)
- Mark's American Cuisine (Houston)
- Mesa Street Grill (El Paso)
- Nana (Dallas)
- Noé Restaurant & Bar (Houston)
- Pappas Brothers Steakhouse (Dallas)
- Perry's Restaurant (Dallas)
- Rough Creek Lodge (Glen Rose)
- Ruth's Chris Steak House (Dallas and San Antonio)
- Stephan Pyles Restaurant (Dallas)
- The Capital Grille (Houston)
- The Lonesome Dove Western Bistro (Fort Worth)
- The Mansion on Turtle Creek (Dallas)
- The Place at Perry's (Dallas)

Utah

- Grappa Italian Restaurant (Park City)
- Log Haven Restaurant (Salt Lake City)
- Painted Pony Restaurant (St. George)
- Riverhorse on Main (Park City)

Vermont

- Hemingway's (Killington)
- The Colonnade (Manchester)
- The Hermitage (West Dover)
- The Inn at Sawmill Farm (West Dover)

Virginia

- Clifton (Charlottesville)
- L'Auberge Chez Francois (Great Falls)
- La Bergerie (Alexandria)
- Lemaire at The Jefferson Hotel (Richmond)
- Regency Room (Williamsburg)
- River'd Inn (Woodstock)
- The Boathouse at Sunday Park (Midlothian)

- The Dining Room at Ford's Colony (Williamsburg)
- The Inn at Little Washington (Washington)
- The Seafare of Williamsburg (Williamsburg)

Washington

- Campagne & Cafe Campagne (Seattle)
- Metropolitan Grill (Seattle)
- Place Pigalle Restaurant & Bar at Pike Place Market (Seattle)
- Ray's Boathouse, Cafe' & Catering (Seattle)
- Sun Mountain Lodge (Winthrop)
- The Georgian (Seattle)
- The Herbfarm (Woodinville)
- The Steak House at Silver Reef Casino (Ferndale)
- Tulalip Bay (Tulalip)

West Virginia

- The Greenbrier's Main Dining Room (White Sulphur Springs)

Wisconsin

- Bartolotta's Lake Park Bistro (Milwaukee)
- Dream Dance (Milwaukee)
- Mr. B's - A Bartolotta Steakhouse (Brookfield)
- Ristorante Bartolotta (Wauwatosa)
- The Immigrant Restaurant at The American Club (Kohler)

Wyoming

- The Granary at Spring Creek Ranch (Jackson Hole)

99.3 Market Resources

DiRona, 105 West Michigan Avenue, Marshall, MI 49068. (269) 789-9316.
(www.dirona.com)

FAVORITE LIMITED-SERVICE RESTAURANTS

100.1 Overview

A series of surveys conducted in 2013 by Market Force Information (www.marketforce.com) queried consumers about their favorite restaurants. The surveys calculated favorites in six categories based on the total number of votes, then factored in the number of locations for each chain to present a more level view of the results. Rankings of the favorite chains, indexed by restaurant count, are presented in this chapter.

100.2 Top Chains By Segment

Breakfast Chains

1. Original Pancake House
2. Le Peep
3. Bakers Square
4. IHOP
5. Village Inn
6. Perkins
7. Bob Evans Restaurants
8. Denny's
9. Waffle House

Buffett Chains

1. Souper! Salad!
2. Golden Corral
3. Old Country Buffet
4. Hometown Buffet
5. Pizza Ranch
6. Ryan's
7. CiCi's Pizza

Casual-dining Chains

1. Maggiano's
2. Pappadeaux
3. Cheesecake Factory

4. Bonefish Grill
5. P.F. Chang's
6. Texas Roadhouse
7. BJ's Brewhouse
8. Carrabba's Italian Grill
9. Olive Garden
10. Red Lobster
11. Longhorn Steakhouse
12. Romano's Macaroni Grill
13. Golden Corral
14. Outback Steakhouse
15. Cracker Barrel
16. Red Robin
17. Chili's Bar & Grill
18. Applebee's
19. Ruby Tuesday
20. T.G.I. Friday's
21. Buffalo Wild Wings
22. IHOP

Continental Chains

1. Cheesecake Factory
2. BJ's Brewhouse
3. Cracker Barrel
4. Red Robin
5. Fuddruckers
6. Applebee's
7. Ruby Tuesday
8. Chili's Bar & Grill
9. T.G.I. Friday's
10. O'Charley's
11. Buffalo Wild Wings

Italian Chains

1. Maggiano's
2. Olive Garden
3. Carrabba's Italian Grill
4. Romano's Macaroni Grill

Seafood Chain

1. Bahama Breeze
2. Pappadeaux
3. Bubba Gump Shrimp Company
4. Joe's Crab Shack

5. Bonefish Grill
6. Red Lobster
7. Roy's

Steakhouse Chains

1. The Capital Grille
2. Black Angus
3. Texas Land and Cattle
4. Texas Roadhouse
5. Fleming's
6. Outback Steakhouse
7. Longhorn Steakhouse
8. Logan's Steakhouse
9. Lone Star Steakhouse & Saloon
10. The Keg
11. Sizzler
12. Tony Roma's
13. Ponderosa Steakhouse

100.3 Market Resources

Market Force Information, P.O. Box 270355, Louisville, CO 80027. (303) 402-6920.
(www.marketforce.com)

FINE-DINING HALL OF FAME

101.1 List of Inductees

Nation's Restaurant News has inducted the following restaurants into its Fine-Dining Hall of Fame for 2013:

- Hot and Hot Fish Club (Birmingham, AL)
- Incanto (San Francisco, CA)
- Jasper's Ristorante (Kansas City, MO)
- Momofuku Ko (New York, NY)

Other restaurants that have been inducted include the following (1999 - 2012):

- Abacus (Dallas, TX)
- Ahwahnee Dining Room (Yosemite National Park, CA)
- Alan Wong's (Honolulu, HI)
- Alinea (Chicago, IL)
- Americas (Houston, TX)
- Annie Gunn's (Chesterfield, MO)
- Aqua (San Francisco, CA)
- Aquavit (New York, NY)
- Aubergine (Newport Beach, CA)
- Babbo (New York, NY)
- Bacchanalia (Atlanta, GA)
- Barolo Grill (Denver, CO)
- Bayona (New Orleans, LA)
- Beverly's Restaurant (Coeur d'Alene, ID)
- Blackberry Farm (Walland, TN)
- Blackbird (Chicago, IL)
- Blue Ginger (Wellesley, MA)
- Blue Hill (New York, NY)
- Boulevard (San Francisco, CA)
- Bouley (New York, NY)
- Brasserie Le Coze (Atlanta, GA)
- Brennan's of Houston (Houston, TX)
- Brigtsen's (New Orleans, LA)
- Broussard's (New Orleans, LA)
- Cafe 36 (La Grange, IL)
- Cafe L'Europe (Palm Beach, FL)

- Cafe Pacific (Dallas, TX)
- Cafe Ponte (Clearwater, FL)
- Canoe (Atlanta, GA)
- Cashion's Eat Place (Washington, DC)
- Charles Nob Hill (San Francisco, CA)
- Christini's Ristorante Italiano (Orlando, FL)
- Michel Richard Citronelle (Washington, DC)
- Clio (Boston, MA)
- Coi (San Francisco, CA)
- Daniel (New York, NY)
- Dominic's (St. Louis, MO)
- Eleven Madison Park (New York, NY)
- Erna's Elderberry House Restaurant (Oakhurst, CA)
- Escoffier Restaurant (Hyde Park, CA)
- Fandango (Pacific Grove, CA)
- Flagstaff House (Boulder, CO)
- Fore Street (Portland, ME)
- Gabriel's (Highwood, IL)
- Gary Danko (San Francisco, CA)
- George's at the Cove (La Jolla, CA)
- Giovanni's on the Hill (St. Louis, MO)
- Goodfellow's (Minneapolis, MN)
- Gramercy Tavern (New York, NY)
- Hamersley's Bistro (Boston, MA)
- Handke's Cuisine (Columbus, OH)
- Harrah's Steak House (Reno, NV)
- Heathman Restaurant & Bar at the Heathman Hotel (Portland, OR)
- Hemingway's (Killington, VT)
- Herbsaint Bar and Restaurant (New Orleans, LA)
- Higgins Restaurant & Bar (Portland, OR)
- Hotel Bel-Air Restaurant (Los Angeles, CA)
- Jack's Oyster House (Albany, NY)
- James at the Mill (Johnson, AR)
- Janos Restaurant (Tucson, AZ)
- Jar (Los Angeles, CA)
- Jean Georges (New York, NY)
- Jeffrey's (Austin, TX)
- JiRaffe (Santa Monica, CA)
- KC's Restaurant (Cleveland, MS)
- Le Vichyssois (Lakemoor, IL)
- Lucques (Los Angeles, CA)
- Lumière (Newton, MA)
- Manresa (Los Gatos, CA)
- Mark's American Cuisine (Houston, TX)

- McCrady's (Charlotte, SC)
- Mélisse (Los Angeles, CA)
- Michael Mina Bellagio (Las Vegas, NV)
- Michael's On East (Sarasota, FL)
- Mr. Stox (Anaheim, CA)
- Naha (Chicago, IL)
- Nana Restaurant (Dallas, TX)
- New Rivers (Providence, RI)
- No. 9 Park (Boston, MA)
- Nobu (New York, NY)
- North Pond (Chicago, IL)
- Peninsula Grill (Charleston, SC)
- Per Se (New York, NY)
- Picasso (Las Vegas, NV)
- Radius (Boston, MA)
- Regency Room at Williamsburg Inn (Williamsburg, VA)
- Restaurant August (New Orleans, LA)
- Restaurant Kevin Taylor (Denver, CO)
- Rioja (Denver, CO)
- Slightly North of Broad (Charleston, SC)
- Splendido at the Chateau (Avon-Beaver Creek, CO)
- Stella! (New Orleans, LA)
- The Boheme (Orlando, FL)
- The Dining Room at The Greenbrier (White Sulphur Springs, WV)
- The Slanted Door (San Francisco, CA)
- Thomas Henkelmann (Greenwich, CT)
- Town (New York, NY)
- Tradition by Pascal (Newport Beach, CA)
- Tribeca Grill (New York, NY)
- Tru (Chicago, IL)
- Uchi (Austin, TX)
- Vidalia (Washington, DC)
- Vincenzo's (Louisville, KY)
- wd~50 (New York, NY)
- Zuni Cafe (San Francisco, CA)

FIVE- AND FOUR-DIAMOND AWARDS

102.1 Five-Diamond Award Winners

AAA (www.aaa.com) first started listing lodging information in its travel publications in the early 1900s. In 1937, the first field inspectors were hired to assess hotels, motels, and restaurants. The current One- to Five-Diamond rating system was introduced in 1977.

AAA designated the following restaurants with Five Diamond ratings for 2013:

Arizona

- Kai (in the Sheraton Wild Horse Pas Resort & Spa, Chandler)

California

- Addison (in The Grand Del Mar, San Diego)
- Benu (San Francisco)
- Erna's Elderberry House Restaurant (in the Chateau du Sureau, Oakhurst)
- Gary Danko (San Francisco)
- The Belvedere (in The Peninsula Beverly Hills, Beverly Hills)
- The French Laundry (Yountville)
- The Kitchen Restaurant (Sacramento)
- The Restaurant at Meadowood (in the Meadowood Napa Valley)

Colorado

- The Penrose Room (in The Broadmoor, Colorado Springs)

Connecticut

- Winvian (in the Winvian, Morris)

District of Columbia

- CityZen (in the Mandarin Oriental, Washington)

Florida

- Salt (in the Ritz-Carlton, Amelia Island, Fernandina Beach)
- Victoria & Albert's (in Disney's Grand Floridian Resort & Spa, Lake Buena Vista)

Hawaii

- Chef Mavro (Honolulu)
- La Mer (in the Halekulani, Honolulu)

Illinois

- Acadia (Chicago)
- Alinea (Chicago)
- Arun's (Chicago)
- Everest (Chicago)
- Grace Restaurant (Chicago)
- Sixteen (in the Trump International Hotel & Tower, Chicago)
- Tru (Chicago)

Kentucky

- The Oakroom (in The Seelbach Hilton, Louisville)

Maine

- The White Barn Inn Restaurant (Kennebunk Beach)

Massachusetts

- L'Espalier (in the Mandarin Oriental, Boston)
- Menton (Boston)

Nevada

- Joël Robuchon (in the MGM Grand Hotel & Casino, Las Vegas)
- Le Cirque (in the Bellagio, Las Vegas)
- Picasso (in the Bellagio, Las Vegas)
- Restaurant Guy Savoy (in Caesars Palace, Las Vegas)

New York

- Blue Hill at Stone Barns (Tarrytown)
- Daniel (New York)
- Del Posto (New York)
- Eleven Madison Park (New York)
- Jean Georges Restaurant (in the Trump International Hotel & Towers, New York)
- Le Bernardin (New York)
- Marea (New York)
- Per Se (New York)

North Carolina

- Heron's Restaurant (in The Umstead Hotel & Spa, Cary)
- The Farrington House Restaurant (in The Farrington House Inn, Farrington Village)

Pennsylvania

- Fountain Restaurant (in the Four Seasons Hotel, Philadelphia)
- Lautrec (in the Nemacolin Woodlands Resort, Farmington)

Texas

- The French Room (in The Adolphus, Dallas)

Virginia

- The Inn at Little Washington Dining Room (Washington)

Washington

- The Herbfarm (Woodinville)

102.2 Four-Diamond Award Winners

AAA designated the following restaurants with Four Diamond ratings for 2013:

Alabama

- 360 Grille (Florence)
- Bottega Restaurant (Birmingham)
- Cafe Dupont (Birmingham)
- Cotton Row Restaurant (Huntsville)
- FIRE Steakhouse (Atmore)
- Grand Steakhouse (Point Clear)
- Highlands Bar & Grill (Birmingham)
- Hot and Hot Fish Club (Birmingham)
- Ocean (Birmingham)
- The Trellis Room (Mobile)

Alaska

- Crow's Nest Restaurant (Anchorage)
- Marx Bros. Cafe (Anchorage)
- Seven Glaciers Restaurant (Girdwood)

Arizona

- Anthony's In The Catalinas (Tucson)
- Binkey's Restaurant (Cave Creek)
- BLT Steak (Scottsdale)
- Bourbon Steak (Scottsdale)
- Core Kitchen & Wine Bar (Marana)
- Cork Restaurant (Chandler)
- Deseo (Scottsdale)
- Different Pointe of View (Phoenix)
- Elements (Paradise Valley)
- Gold (Tucson)
- J & G Steakhouse (Scottsdale)
- L'Auberge Restaurant on Oak Creek (Sedona)

- Lon's at the Hermosa (Paradise Valley)
- Main Dining Room at the Arizona Inn (Tucson)
- noca (Phoenix)
- Palm Court (Scottsdale)
- Posh Improvisational Cuisine (Scottsdale)
- Prado (Paradise Valley)
- Primo (Tucson)
- Quiessence (Phoenix)
- Sassi Ristorante (Scottsdale)
- T. Cook's (Phoenix)
- Talavera (Scottsdale)
- The Grill at Hacienda del Sol (Tucson)
- Wright's at the Biltmore (Phoenix)

Arkansas

- Ashleys at the Capital (Little Rock)
- James At The Mill (Johnson)

California

- A.R. Valentien (La Jolla)
- Acquerello (San Francisco)
- Alexander's Steakhouse (Cupertino)
- Ame Restaurant (San Francisco)
- Argyle Steakhouse (Carlsbad)
- Aubergine at L'Auberge (Carmel-by-the-Sea)
- Bertrand at Mister A's (San Diego)
- Big 4 Restaurant (San Francisco)
- Bouchon (Beverly Hills)
- Boulevard (San Francisco)
- Campton Place Restaurant (San Francisco)
- Cielo (Cabazon)
- Coi (San Francisco)
- Culina Modern Italian (Los Angeles)
- Cut by Wolfgang Puck (Beverly Hills)
- Dawson's (Sacramento)
- Donovan's Steak & Chop House (La Jolla)
- Dry Creek Kitchen (Healdsburg)
- Duane's Prime Steaks & Seafood (Riverside)
- Etoile at Domaine Chandon (Yountville)
- Europa Restaurant at the Villa Royale Inn (Palm Springs)
- Farmhouse Restaurant (Forestville)
- Fifth Floor (San Francisco)
- Fleur de Lys (San Francisco)
- Gennaro's Ristorante (Glendale)

- George's California Modern (La Jolla)
- Grant Grill (San Diego)
- Great Oak Steakhouse (Temecula)
- Hampton's (Westlake Village)
- High Steaks Steakhouse (Lincoln)
- Jardiniere (San Francisco)
- La Folie (San Francisco)
- La Toque (Napa)
- Le Vallauris (Palm Springs)
- Madrona Manor Wine Country Inn & Restaurant (Healdsburg)
- Manresa (Los Gatos)
- Maravilla (Ojai)
- Melisse (Santa Monica)
- Michael Mina (San Francisco)
- Mille Fleurs (Rancho Santa Fe)
- Murray Circle (Sausalito)
- Napa Rose (Anaheim)
- Navio (Half Moon Bay)
- Pacific's Edge (Carmel-by-the-Sea)
- Palm Terrace Restaurant (Newport Beach)
- Parallel 37 (San Francisco)
- Patina (Los Angeles)
- Quattro Restaurant & Bar (East Palo Alto)
- Quince (San Francisco)
- Raya (Dana Point)
- Saddle Peak Lodge (Calabasas)
- Saison (San Francisco)
- Sante (Sonoma)
- Sardine Factory (Monterey)
- Sirocco (Indian Wells)
- Spago Beverly Hills (Beverly Hills)
- Spruce (San Francisco)
- Studio (Laguna Beach)
- The Ballard Inn Restaurant (Solvang)
- The Belvedere (Beverly Hills)
- The Blvd (Beverly Hills)
- The Californian (Huntington Beach)
- The Cellar (Fullerton)
- The Duck Club Restaurant (Lafayette)
- The Firehouse (Sacramento)
- The First Cabin At The Balboa Bay Club & Resort (Newport Beach)
- The French Poodle Restaurant (Carmel-by-the-Sea)
- The Kitchen Restaurant (Sacramento)
- The Marine Room (La Jolla)

- The Plumed Horse (Saratoga)
- The Raymond Restaurant (Pasadena)
- The Ritz Restaurant and Garden (Newport Beach)
- The Village Pub (Woodside)
- The Willows (Santa Ynez)
- Valentino Santa Monica (Santa Monica)
- Vivace (Carlsbad)
- Wally's Desert Turtle (Rancho Mirage)

Colorado

- Alpenglow Stube (Keystone)
- Chefs Club by Food & Wine (Aspen)
- Colt & Gray (Denver)
- Edge Restaurant & Bar (Denver)
- Ekenebt 47 (Aspen)
- Frasca (Boulder)
- Grouse Mountain Grill (Beaver Creek)
- Keystone Ranch Restaurant (Keystone)
- Mirabelle at Beaver Creek (Beaver Creek)
- Mizuna (Denver)
- Palace Arms (Denver)
- Panzano (Denver)
- Restaurant Kelly Liken (Vail)
- Restaurant Kevin Taylor (Denver)
- Rev Restaurant at Hotel Madeline Telluride (Telluride)
- Rioja (Denver)
- Spago (Beaver Creek)
- Splendido at the Chateau (Beaver Creek)
- Summit (Colorado Springs)
- Syzygy (Aspen)
- The Cliff House Dining Room (Manitou Springs)
- The Flagstaff House Restaurant (Boulder)

Connecticut

- Craftsteak (Mashantucket)
- Fresh Salt (Old Saybrook)
- Octagon (Groton)
- ON20 (Hartford)
- Paragon (Mashantucket)
- Rebeccas (Greenwich)
- Stonehenge Inn and Restaurant (Ridgefield)
- Thomas Henkelmann (Greenwich)

Delaware

- The Green Room (Wilmington)

District of Columbia

- Bourbon Steak (Washington)
- Komi (Washington)
- Marcel's (Washington)
- Westend Bistro by Eric Ripert (Washington)

Florida

- A Land Remembered (Orlando)
- Area 31 (Miami)
- Armani's (Tampa)
- Arturo's Ristorante (Boca Raton)
- Atlantic's Edge (Islamorada)
- Atrio (Miami)
- Azul (Miami)
- Azurea (Atlantic Beach)
- Barton G. The Restaurant (Miami Beach)
- Bull & Bear Restaurant (Lake Buena Vista)
- Cafe Boulud (Palm Beach)
- Casa Tua (Miami Beach)
- Cala Bella (Orlando)
- Caretta on the Gulf (Clearwater Beach)
- Christini's Ristorante Italiano (Orlando)
- Cioppino (Key Biscayne)
- db Bistro Moderne (Miami)
- DeRodriguez Cuba on Ocean (Miami Beach)
- East End Brasserie (Fort Lauderdale)
- Fish Out of Water (Santa Rosa Beach)
- Gotham Steak (Miami Beach)
- Hakkasan (Miami Beach)
- Hollywood Prime (Hollywood)
- Hot Tin Roof (Key West)
- Il Mulino New York (Sunny Isles Beach)
- Ireland's Steakhouse (Weston)
- J & G Grill (Bal Harbour)
- Kathy's Gazebo Cafe (Boca Raton)
- Latitudes (Key West)
- Lemonia (Naples)
- Luma on Park (Winter Park)
- Malcolm's: the art of food (Palm Beach)
- Maritana Grille (St. Pete Beach)
- Matthew's Restaurant (Jacksonville)

- Michael's On East (Sarasota)
- Michy's (Miami)
- Neomi's Grill (Sunny Isles Beach)
- Norman's At The Ritz-Carlton (Orlando)
- Palme d'Or (Coral Gables)
- Paradiso Restaurant (Lake Worth)
- Primo (Orlando)
- Rainbow Palace (Fort Lauderdale)
- Restaurant Medure (Ponte Vedra Beach)
- Red The Steakhouse South Beach (Miami Beach)
- Sale e Pepe (Marco Island)
- Scarpetta (Miami Beach)
- Seagar's Prime Steaks and Seafood (Destin)
- SideBern's (Tampa)
- Sugarcane Raw Bar Grill (Miami)
- Tantra Restaurant & Lounge (Miami Beach)
- The Dining Room at Little Palm Island (Big Pine Key)
- The Grill (Naples)
- The Restaurant at The Setai (Miami Beach)
- The Venetian Room (Lake Buena Vista)
- Timo (Sunny Isles Beach)
- Todd English's Bluezoo (Lake Buena Vista)
- Via Luna (Fort Lauderdale)

Georgia

- Aria (Atlanta)
- Atlanta Grill (Atlanta)
- Bacchanalia (Atlanta)
- BLT Steak (Atlanta)
- Canoe (Atlanta)
- Georgia's Bistro (Greensboro)
- La Grotta Ravinia Ristorante Italiano (Atlanta)
- La Grotta Ristorante Italiano (Atlanta)
- Nan Thai Fine Dining (Atlanta)
- Nikolai's Roof (Atlanta)
- Park 75 at the Four Seasons (Atlanta)
- Restaurant Eugene (Atlanta)

Hawaii

- Azul (Kapolei)
- Bali Steak & Seafood (Honolulu)
- Brown's Beach House (Kohala Coast)
- Hoku's (Honolulu)
- Orchids (Honolulu)

- Spago (Wailea)
- The Dining Room (Lanai City)
- ULU Ocean Grill (Kaupulehu)

Idaho

- Beverly's (Coeur D'Alene)

Illinois

- Blackbird (Chicago)
- Boka (Chicago)
- L2O (Chicago)
- Les Nomades (Chicago)
- Lockwood Restaurant (Chicago)
- Masaki (Chicago)
- mk (Chicago)
- moto (Chicago)
- NAHA (Chicago)
- Next Restaurant (Chicago)
- Pelago Ristorante (Chicago)
- Shanghai Terrace (Chicago)
- Spiaggia (Chicago)
- Tallgrass (Lockport)
- Topolobampo (Chicago)

Indiana

- Joseph Decuis (Roanoke)
- LaSalle Grill (South Bend)
- Restaurant Tallent (Bloomington)
- The Carriage House Dining Room (South Bend)

Kentucky

- Corbett's - An American Place (Louisville)
- English Grill (Louisville)
- Vincenzo's Restaurant (Louisville)
- Z's Oyster Bar & Steakhouse (Louisville)

Louisiana

- Commander's Palace (New Orleans)
- Emeril's (New Orleans)
- Emeril's Delmonico Restaurant & Bar (New Orleans)
- Restaurant August (New Orleans)
- Restaurant Revolution (New Orleans)
- Root (New Orleans)
- Stella! (New Orleans)

- The Grill Room (New Orleans)

Maine

- Back Bay Grill (Portland)
- Earth (Kennebunkport)
- Fore Street (Portland)
- Hartstone Inn (Camden)
- Hugo's Restaurant (Portland)
- Natalie's (Camden)
- Primo (Rockland)
- the Salt Exchange (Portland)

Maryland

- Charleston (Baltimore)
- Sherwood's Landing (St. Michaels)
- Volt (Frederick)

Massachusetts

- Asana (Boston)
- Aura (Boston)
- Clio (Boston)
- Deuxave (Boston)
- Left Bank (Tyngsboro)
- Mamma Maria (Boston)
- Market by Jean-Georges (Boston)
- Meritage (Boston)
- Miel (Boston)
- Moos.... (Boston)
- No. 9 Park (Boston)
- Pigalle (Boston)
- Radius (Boston)
- Rialto (Cambridge)
- Stars at Chatham Bars Inn (Chatham)
- The Cafe (Boston)
- The Old Inn on the Green (New Marlborough)
- Topper's (Nantucket)
- twenty-eight Atlantic (East Harwich)

Michigan

- Cafe' Cortina (Farmington Hills)
- Cygnus 27 (Grand Rapids)
- Iridescence Restaurant (Detroit)
- Rugby Grille (Birmingham)
- The Lark (West Bloomfield)

Minnesota

- Cosmos (Minneapolis)
- La Belle Vie (Minneapolis)

Mississippi

- BR Prime (Biloxi)
- Jia (Biloxi)
- Purple Parrot Café (Hattiesburg)
- thirty-two (Biloxi)
- Tien (Biloxi)

Missouri

- Bluestem Restaurant (Kansas City)
- Cielo Restaurant (St. Louis)
- Giovanni's on the Hill (St. Louis)
- Niche (Clayton)
- The American Restaurant at Crown Center (Kansas City)
- The Grill (Clayton)
- Tony's (St. Louis)

Nevada

- Alizé (Las Vegas)
- Andre's Las Vegas (Las Vegas)
- Atlantis Steakhouse (Reno)
- Aureole (Las Vegas)
- B & B Ristorante (Las Vegas)
- BARLOTTA Ristorante di Mare (Las Vegas)
- Bimini Steakhouse (Reno)
- Botero (Las Vegas)
- Carnevino (Las Vegas)
- Ciera Steak & Chop House (Stateline)
- Craftsteak (Las Vegas)
- CUT by Wolfgang Puck (Las Vegas)
- Eiffel Tower Restaurant (Las Vegas)
- Gordon Ramsay Steak (Las Vegas)
- Jasmine (Las Vegas)
- L'Atelier de Joël Robuchon (Las Vegas)
- Michael Mina (Las Vegas)
- Michael's Gourmet Room (Las Vegas)
- Mix (Las Vegas)
- Pearl (Las Vegas)
- Prime Steakhouse (Las Vegas)
- Sage (Las Vegas)

- Sensi (Las Vegas)
- Shibuya (Las Vegas)
- Spago (Las Vegas)
- Stripsteak (Las Vegas)
- SW Steakhouse (Las Vegas)
- The Country Club - A New American Steakhouse (Las Vegas)
- Twist (Las Vegas)
- Wing Lei (Las Vegas)

New Hampshire

- Bedford Village Inn Restaurant (Bedford)
- Mountain View Grand Resort and Spa Main Dining Room (Whitefield)
- The Dining Room at The Omni Bretton Arms Inn (Bretton Woods)
- The Dining Room at The Omni Mount Washington Hotel (Bretton Woods)
- The Inn at Thorn Hill (Jackson)
- The Manor Dining Room (Holderness)
- The Wentworth Dining Room (Jackson)

New Jersey

- David Burke Fromagerie (Rumson)
- Il Capriccio (Whippany)
- Ninety Acres (Peapack)
- Pluckemin Inn (Bedminster)
- Rat's (Hamilton)
- Restaurant Nicholas (Red Bank)
- Restaurant Serenade (Chatham)
- Stage Left (New Brunswick)
- The Bernards Inn (Bernardsville)
- The Frog and the Peach (New Brunswick)
- The Manor (West Orange)

New Mexico

- Geronimo (Santa Fe)
- Terra (Santa Fe)

New York

- A Voce Columbus (New York)
- Ai Fiori (New York)
- Aquavit (New York)
- Arabelle (New York)
- Aretsky's Patroon (New York)
- Asiate (New York)
- Aureole (New York)
- Babbo (New York)

- BLT Steak (New York)
- Blue Hill (New York)
- BondSt (New York)
- Bouley (New York)
- Brushstroke (New York)
- Cafe Boulud (New York)
- City Hall (New York)
- Colicchio & Sons (New York)
- Craft (New York)
- David Burke Townhouse (New York)
- db Bistro Moderne (New York)
- Dovetail (New York)
- Equus (Tarrytown)
- Gordon Ramsay at The London (New York)
- Gotham Bar and Grill (New York)
- Gramercy Tavern (New York)
- Junoon Restaurant (New York, NY)
- La Fleur (Mayville)
- La Grenouille (New York)
- La Panetiere (Rye)
- Le Cirque (New York)
- Nobu (New York)
- NoMad (New York)
- North End Grill (New York)
- Oceana (New York)
- One If By Land, Two If By Sea (New York)
- Picholine (New York)
- Rogue Tomate (New York)
- Scalini Fedili (New York)
- Sirio Ristorante New York (New York)
- Scrimshaw at The Desmond (Colonie)
- South Gate (New York)
- Taste Albany (Albany)
- Telepan (New York)
- The Four Seasons (New York)
- The Inn at Erlowest (Lake George)
- The View Restaurant (Lake Placid)
- TOKU Modern Asian (Manhasset)
- Wallse Restaurant (New York)
- wd~50 (New York)
- Wildflowers (Verona)

North Carolina

- 1895 Grille (Pinehurst)

- Bonterra Dining & Wine Room (Charlotte)
- Carolina Crossroads Restaurant (Chapel Hill)
- Chef and The Farmer (Kinston)
- Four Square Restaurant (Durham)
- Gamekeeper Restaurant & Bar (Boone)
- Horizons (Asheville)
- Il Palio Ristorante (Chapel Hill)
- Kimball's Kitchen (Duck)
- Madison's Restaurant & Wine Bar (Highlands)
- McNinch House (Charlotte)
- Second Empire Restaurant & Tavern (Raleigh)
- The Fairview Dining Room (Durham)
- Zebra Restaurant and Fine Catering (Charlotte)

North Dakota

- HoDo Restaurant (Fargo)

Ohio

- Boca Restaurant (Cincinnati)
- Lola (Cleveland)
- M (Columbus)
- Nicola's (Cincinnati)
- Orchids at Palm Court (Cincinnati)
- Ristorante Giovanni's (Beachwood)
- The Celestial Steakhouse (Cincinnati)
- The Leopard Restaurant (Aurora)
- The Palace Restaurant (Cincinnati)
- The Refectory Restaurant & Bistro (Columbus)

Oklahoma

- Polo Grill (Tulsa)
- The Coach House (Oklahoma City)

Oregon

- Noisette Restaurant (Portland)
- The Painted Lady (Newberg)

Pennsylvania

- 10 Arts Bistro & Lounge by Eric Ripert (Philadelphia)
- Aqueous (Farmington)
- Barclay Prime (Philadelphia)
- Eleven (Pittsburgh)
- Lacroix at The Rittenhouse (Philadelphia)
- Morimoto (Philadelphia)

- Moshulu (Philadelphia)
- Patsel's (Clarks Summit)
- Savona (West Conshohocken)
- Swann Lounge & Cafe (Philadelphia)
- TÈ (Leola)
- The Circular (Hershey)
- The Commonwealth Room (York)
- The French Manor Restaurant (South Sterling)
- The Golden Sheaf (Harrisburg)
- Vetri (Philadelphia)
- XIX (Nineteen) Restaurant (Philadelphia)

Rhode Island

- Gracies (Providence)
- Muse by Jonathan Cartwright (Newport)
- Seasons at the Ocean House (Watch Hill)
- Spiced Pear Restaurant (Newport)

South Carolina

- Charleston Grill (Charleston)
- Circa 1886 (Charleston)
- Cypress (Charleston)
- Divine Prime (Myrtle Beach)
- Grill 225 (Charleston)
- Hall's Chophouse (Charleston)
- Langdon's Restaurant and Wine Bar (Mount Pleasant)
- Ocean Room (Kiawah Island)
- Old Fort Pub (Hilton Head Island)
- Palmetto Cafe (Charleston)
- Passion 8 Bistro (Fort Mill)
- Peninsula Grill (Charleston)
- Rick Erwin's Nantucket Seafood grill (Greenville)
- The Dining Room at Abingdon Manor (Latta)
- Tristan (Charleston)

Tennessee

- Capitol Grille (Nashville)
- Chez Philippe (Memphis)
- St. John's Restaurant (Chattanooga)
- The Orangery (Knoxville)

Texas

- Abacus (Dallas)
- Antlers Lodge (San Antonio)

- Bijoux (Dallas)
- Bohanan's Prime Steak and Seafood (San Antonio)
- Brennan's of Houston (Houston)
- Café on the Green (Irving)
- Christopher's World Grille (Bryan)
- Citrus (San Antonio)
- DaMarco (Houston)
- Fearing's (Dallas)
- Francesca's at Sunset (San Antonio)
- Hill Country Dining Room (Austin)
- Hotel St. Germain (Dallas)
- Las Canarias Restaurant (San Antonio)
- Mark's American Cuisine (Houston)
- Noé Restaurant & Bar (Houston)
- Ostra (San Antonio)
- Pappas Bros. Steakhouse (Houston)
- Pyramid Restaurant & Bar (Dallas)
- Quattro (Houston)
- Shearn's Restaurant (Galveston)
- Sustenio (San Antonio)
- The Driskill Grill (Austin)
- The Inn at Dos Brisas (Washington)
- The Mansion Restaurant at Rosewood Mansion (Dallas)
- The Remington Restaurant (Houston)
- The Republic (College Station)
- The Steakhouse (Galveston)
- Tony's (Houston)
- Trio (Austin)
- Valentino (Houston)

Utah

- Apex Restaurant (Park City)
- Blue Boar Restaurant (Midway)
- Chef's Table (Orem)
- Forage Restaurant (Salt Lake City)
- Glitretind (Park City)
- Goldener Hirsch Restaurant (Park City)
- Grappa Italian Restaurant (Park City)
- J&G Grill at St. Regis (Park City)
- Log Haven (Salt Lake City)
- Riverhorse on Main (Park City)
- The Mariposa (Park City)
- The Paris Bistro (Salt Lake City)
- Tree Room at Sundance Resort (Provo)

- Valter's Osteria (Salt Lake City)

Vermont

- 275 Main (Warren)
- Amuse at The Essex Resort & Spa (Essex Junction)
- Rabbit Hill Inn Dining Room (Lower Waterford)
- Solstice (Stowe)
- The Red Rooster (Woodstock)
- Windham Hill Restaurant (West Townshend)

Virginia

- 2941 Restaurant (Falls Church)
- Fat Canary (Williamsburg)
- Fossett's (Keswick)
- L'Auberge Chez Francois & Jacques Brasserie (Great Falls)
- L'Auberge Provencale (White Post)
- Lemaire (Richmond)
- Restaurant Eve (Alexandria)
- Salacia (Virginia Beach)
- Terrapin (Virginia Beach)
- The Old Mill Room (Charlottesville)
- The Regency Dining Room (Williamsburg)

Washington

- Altura (Seattle)
- Canlis (Seattle)
- Masselow's (Airway Heights)
- Sun Mountain Lodge Dining Room (Winthrop)
- The Dining Room at Salish Lodge & Spa (Snoqualmie)
- The Georgian (Seattle)
- The Willows Inn on Lummi Island (Lummi Island)
- Tulalip Bay (Marysville)

West Virginia

- Bavarian Inn Dining Room (Shepherdstown)

Wisconsin

- L'Etoile (Madison)
- Sanford Restaurant (Milwaukee)
- The Immigrant Restaurant & Winery (Kohler)

Wyoming

- The Wild Sage (Jackson)
- Westbank Grill (Teton Village)

FUTURE 50**103.1 Overview**

Restaurant Business compiles an annual list of the fastest growing chains with sales between \$25 million and \$50 million. Dubbed the Future 50, the list is based on data from Technomic (www.technomic.com).

103.2 Fastest Growing Chains 2013

1. sweetFrog
2. Hot Head Burritos
3. Tutti Frutti Frozen Yogurt
4. Mooyah
5. Lime Fresh Mexican Grill
6. Nothing Bundt Cakes
7. Native Foods Café
8. Kneaders Bakery & Café
9. Crave
10. Costa Vida Fresh Mexican Grill
11. Toppers Pizza
12. Shake Shack
13. Burtons Grill
14. Rosa Mexicano Restaurants
15. Grimaldi's Coal Brick-Oven Pizzeria
16. Yogurt Mountain
17. La Boulange
18. Pita Jungle
19. Another Broken Egg Café
20. Johnny's Pizza House
21. The Rock Wood Fired Pizza & Spirits
22. Boudin Sourdough Bakery & Café
23. Chop't Creative Salad Company
24. Stanford's Restaurant & Bar
25. American Deli
26. Fricker's
27. Wing Warehouse
28. Native New Yorker

29. Sarpino's Pizzeria
30. Sammy's Woodfired Pizza & Grill
31. Baumhower's Restaurant
32. Jimmy's Egg
33. Crumbs Bake Shop
34. Zoup! Fresh Soup Company
35. Hyde Park Prime Steakhouse
36. Bush's Chicken
37. Muscle Maker Grill
38. California Tortilla
39. Roosters
40. El Fenix Café
41. Erbert & Gerbert's Sandwich Shop
42. P.J. Whelihan's Pub & Restaurant
43. Tommy Bahama
44. Cafe Express
45. Russo's New York Pizzeria
46. Razzoo's Cajun Café
47. Lizard's Thicket
48. Wing Zone
49. Pizza Patrón
50. Jollibee

103.3 Market Resources

Restaurant Business, One Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181.
(630) 574-5075. (www.restaurantbusinessonline.com)

Technomic, Inc., 300 South Riverside Plaza, Suite 1200, Chicago, IL 60606.
(312) 876-0004. (www.technomic.com)

GREAT STEAK HOUSES

104.1 Overview

The following section lists several awards and designations that recognize steakhouses throughout the U.S.

104.2 List Of Recognitions 2013

Best American Steakhouses

- 333 Pacific - Oceanside (San Diego/Oceanside, CA)
- ALC (Austin, TX)
- Benny's Steak & Seafood (Jacksonville, FL)
- Carne Chophouse (Tampa/Ybor City, FL)
- Carnevor Restaurant (Milwaukee, WI)
- Chamberlain's Steak and Chop House (Dallas, TX)
- Chima Brazilian Steakhouse (several locations)
- Dickie Brennan's (New Orleans, LA)
- DiVino (Hilton Head, SC)
- Eddie Merlot's (several locations)
- Grill 23 & Bar (Boston, MA)
- House of Prime Rib (San Francisco, CA)
- Hyde Park Prime Steakhouse (several locations)
- Island Prime (San Diego, CA)
- Jimmy Kelly's Steakhouse (Nashville, TN)
- McMahon's Prime (Tucson, AZ)
- Pampas Brazilian (Las Vegas, NV)
- Parker's Restaurant & Bar (Chicago/Downer's Grove, IL)
- Peachwood's Steakhouse (Santa Cruz, CA)
- Rays in the City (Atlanta, GA)
- Rodizio Grill (several locations)
- Saltwater Grill (Panama City Beach, FL)
- Stockyards Steakhouse (Phoenix, AZ)
- Sundance The Steakhouse (Palo, Alto, CA)
- The Prime Rib (several locations)
- Tropical Acres (Ft. Lauderdale, FL)
- Uncle Jack's (New York, NY)
- Weber's (Ann Arbor, MI)

Great Steak Houses of North America

- Benjamin Steak House (New York and White Plains, NY)
- Gene & Georgetti (Chicago, IL)
- Grill 225 (Charleston, SC)
- Ill Forks (several locations)
- Malone's (Lexington, KY)
- Manny's Steak House (Minneapolis, MN)
- McKendrick's Steak House (Atlanta, GA)
- Metropolitan Grill (Seattle, WA)
- RingSide Steakhouse (Portland, OR)
- St. Elmo Steak House (Indianapolis, IN)

Local Eats

- Angus Barn (Raleigh, NC)
- Bern's Steak House (Tampa, FL)
- Bone's (Atlanta, GA)
- Cattlemen's Steakhouse (Oklahoma City, OK)
- Charley's Steak House (Orlando, FL)
- CUT (Beverly Hills, CA)
- Gibson's Bar & Steakhouse (Chicago, IL)
- RingSide Steakhouse (Portland, OR)
- St. Elmo Steak House (Indianapolis, IN)
- The Prime Rib (Baltimore, MD)

The Daily Meal

- Barclay Prime (Philadelphia, PA)
- Bern's (Tampa, FL)
- CarneVino (Las Vegas, NV)
- Cattleman's Steakhouse (Oklahoma City, OK and Fabens, TX)
- Cut (Beverly Hills, CA)
- Dickie Brennan's Steakhouse (New Orleans, LA)
- Gibson's Bar & Steakhouse (Chicago, IL)
- Gorat's (Omaha, NE)
- House of Prime Rib (San Francisco, CA)
- Jess & Jim's (Kansas City, MO)
- Keens (New York, NY)
- Kevin Rathbun Steak (Atlanta, GA)
- Killen's Steakhouse (Pearland, TX)
- Mr. B's (Milwaukee, WI)
- Murray's (Minneapolis, MN)
- Oak Steakhouse (Charleston, SC)
- Pappas Bros. Steakhouse (Dallas and Houston, TX)
- Peter Luger (New York, NY)
- St. Elmo's Steak House (Indianapolis, IN)

Thrillist

- Barclay Prime (Philadelphia, PA)
- Bavette's Bar and Boeuf (Chicago, IL)
- Bern's Steak House (Tampa, PA)
- Bogie's Steak (Boston, MA)
- Citizen Kane's Steak House (St. Louis, MO)
- CUT (Beverly Hills, CA)
- Dickie Brenna's Steakhouse (New Orleans, LA)
- Farmer Browns Steak House (Waterloo, NE)
- Gibson's (Chicago, IL)
- John Howie Steak (Bellevue, WA)
- Keens (New York, NY)
- Kenny's Wood Fired Grill (Dallas, TX)
- Kevin Rathbun Steak (Atlanta, GA)
- Killen's Steakhouse (Pearland, TX)
- Mahogany Prime Steakhouse (Omaha, NE)
- Murray's (Minneapolis, MN)
- Ox (Portland, OR)
- Pappas Bros. Steakhouse (Dallas, TX)
- Peter Luger (New York, NY)
- Riverfront Steakhouse (Little Rock, AR)
- St. Elmo's Steak House (Indianapolis, IN)

Tom Horan's Top Ten Steakhouses

- AJ Maxwell's Steakhouse (New York, NY)
- Al Biernat's (Dallas, TX)
- Benjamin Steak House (New York, NY)
- Chicago Cut Steakhouse (Chicago, IL)
- Dickie Brennan's Steakhouse (New Orleans, LA)
- E.B. Green's Steakhouse (Buffalo, NY)
- Stock-Yard Restaurant (Nashville, TN)
- The Steamboat House (Houston, TX)
- Vic & Anthony's (Houston, TX)
- Vito's Chop House (Orlando, FL)
- Z's Oyster Bar & Steakhouse (Louisville, KY)

HOT CONCEPTS!

105.1 Award Recipients 2013

Each year the editors of *Nation's Restaurant News* select emerging restaurant brands that have distinguished themselves as Hot Concepts!

The following brands were given the Hot Concepts! designation in 2013:

- Fresh to Order
- Max's Wine Dive
- Modmarket
- Piada Italian Street Food
- Umami Burger

105.2 Recent Designations

Restaurant brands selected for past Hot Concepts! designation are as follows:

2012

- Coolhaus
- Del Frisco's Grille
- Pie Five Pizza Co.
- Stacked Food Well Built

2011

- Crave
- FöD
- Mixt Greens
- True Food Kitchen
- Twisted Root Burger Co.

2010

- Cooper's Hawk Winery & Restaurant
- Pizza Fusion
- Shake Shack
- Twin Peaks

2009

- Red Mango
- Smashburger
- The Lazy Dog Cafe
- Tutta Bella Neapolitan Pizzeria
- Vino Volo

2008

- Chop't Creative Salad Company
- Jasper's
- Organic To Go
- The Counter
- Vapiano's International

2007

- Go Roma Italian Kitchen
- Granite City Food & Brewery
- The Grape
- Gyu-Kaku Japanese BBQ
- Which Wich?
- WingStreet

2006

- Cheeseburger in Paradise
- Pandini's
- RedBrick Pizza
- Seasons 52
- Spicy Pickle
- Summer Shack

2005

- Caffé Ritazza
- Cafe Spice
- Offerdahl's Cafe Grill
- Redstone American Grill
- Sauce Pizza & Wine
- Up The Creek Fish Camp & Grill
- Zoup! Fresh Soup Company

2004

- Crescent City
- Fox Sports Grill
- Jazzman's Cafe
- Moe's Southwest Grill

- O'Naturals
- Thaifoon Taste of Asia

2003

- Fogo de Chão
- Grand Lux Cafe
- Pei Wei Asian Diner
- Raising Cane's Chicken Fingers
- Smokey Bones BBQ
- Ted's Montana Grill

2002

- Brio Tuscan Grille
- Fresh City
- Genghis Grill
- Pallino Pastaria Company
- Stonewood Tavern and Grill
- Yard House

2001

- ESPN Zone
- Figs Restaurant
- Fire & iCE
- Nick & Stef's
- Noodles & Company
- Samba Room

2000

- Big Bowl
- Fleming's Prime Steakhouse
- Fuzio Universal Pasta
- House of Bread
- Maui Tacos
- Naked Fish Restaurants
- Nobu
- Not Your Average Joe's

105.3 Market Resources

Nation's Restaurant News, 249 W. 17th Street, New York, NY 10011. (212) 204-4200.
(www.nrn.com)

JAMES BEARD FOUNDATION AWARDS

106.1 Overview

The James Beard Foundation Awards (www.jamesbeard.org), often called “The Oscars of the Food World,” have been presented annually since 1990. A slate of nominees is presented each March, and more than 600 culinary professionals are involved in the voting process. Winners are announced in June. The sections that follow list current and recent award winners.

106.2 Award Winners 2013

Outstanding Restaurant

- Blue Hill (New York, NY)

Best New Restaurant

- State Bird Provisions (San Francisco, CA)

Outstanding Chefs

- David Chang: Momofuku Noodle Bar (New York, NY)
- Paul Kahan: Blackbird (Chicago, IL)

Rising Star Chef

- Danny Bowien: Mission Chinese Food (San Francisco, CA and New York, NY)

Outstanding Pastry Chef

- Brooks Headley: Del Posto (New York, NY)

Best Chef: Great Lakes

- Stephanie Izard: Girl & the Goat (Chicago, IL)

Best Chef: Mid-Atlantic

- Johnny Monis: Komi (Washington, DC)

Best Chef: Midwest

- Colby Garrelts: Bluestem (Kansas City, MO)

Best Chef: New York City

- Wylie Dufresne: wd~50 (New York, NY)

Best Chef: Northeast

- Melissa Kelly: Primo (Rockland, ME)

Best Chef: Northwest

- Gabriel Rucker: Le Pigeon (Portland, OR)

Best Chef: South

- Tory McPhail: Commander's Palace (New Orleans, LA)

Best Chef: Southeast

- Joseph Lenn: The Barn at Blackberry Farm (Wallan, TN)

Best Chef: Southwest

- Jennifer Jasinski: Rioja (Denver, CO)

Best Chef: West

- Christopher Kostow: The Restaurant at Meadowood (St. Helena, CA)

106.3 Recent Award Winners**Outstanding Restaurant**

- 2012: Boulevard (San Francisco, CA)
- 2011: Eleven Madison Park (New York, NY)
- 2010: Daniel (New York, NY)
- 2009: Jean Georges (New York, NY)
- 2008: Gramercy Tavern (New York, NY)
- 2007: Frontera Grill (Chicago, IL)

Best New Restaurant

- 2012: Next (Chicago, IL)
- 2011: ABC Kitchen (New York, NY)
- 2010: Marea (New York, NY)
- 2009: Momofuku Ko (New York, NY)
- 2008: Central Michel Richard (Washington, DC)
- 2007: L'Atelier de Joël Robuchon (Las Vegas, NV)

Outstanding Chef

- 2012: Daniel Humm (Eleven Madison Park; New York, NY)
- 2011: José Andrés (minibar; Washington, DC)
- 2010: Tom Colicchio (Craft; New York City)

- 2009: Dan Barber (Blue Hill; New York, NY)
- 2008: Grant Achatz (Alinea; Chicago, IL)
- 2007: Michel Richard (Michel Richard Citronelle; Washington, DC)

Rising Star Chef

- 2012: Christina Tosi (Momofuku Milk Bar; New York, NY)
- 2011: Gabriel Rucker (Le Pigeon; Portland, OR)
- 2010: Timothy Hollingsworth (The French Laundry; Yountville, CA)
- 2009: Nate Appleman (A16; San Francisco, CA)
- 2008: Gavin Kaysen (Cafe Boulud; New York, NY)
- 2007: David Chang (Momofuku Noodle Bar; New York, NY)

Outstanding Pastry Chef

- 2012: Mindy Segal (Mindy's HotChocolate; Chicago, IL)
- 2011: Angela Pinkerton (Eleven Madison Park; New York, NY)
- 2010: Nicole Plue (Redd; Yountville, CA)

106.4 Market Resources

James Beard Foundation, 167 West 12th Street, New York, NY 10011. (212) 675-4984.
(www.jamesbeard.org)

MENU MASTERS

107.1 Overview

Selected annually by *Nation's Restaurant News*, the Menu Masters Awards honor companies and individuals that have created the most successful new menu developments. This chapter lists current and recent award winners.

107.2 Winners By Category

Best Healthy Innovations

- 2013: Silver Diner: Kids Menu
- 2012: The Cheesecake Factory
- 2011: Subway
- 2010: KFC
- 2009: Qdoba's Smart Meals
- 2008: University of Connecticut's Department of Dining Services
- 2007: Chartwells
- 2006: Williamson Hospitality Services
- 2005: T.G.I. Friday's
- 2004: Ruby Tuesday
- 2003: Applebee's Neighborhood Grill & Bar
- 2002: Ground Round
- 2001: Fresh Choice
- 2000: Chili's
- 1999: Jamba Juice

Best Limited-Time Offer

- 2013: Papa John's Pizza: Buffalo Chicken Pizza
- 2012: Quaker Steak & Lube: Shake, Wrap & Roll!
- 2011: Popeyes Louisiana Kitchen
- 2010: Red Robin Gourmet Burgers
- 2009: Denny's
- 2008: Burger King
- 2007: Golden Corral
- 2006: Taco Bell
- 2005: Panera Bread
- 2004: 99 Restaurant & Pub

- 2003: Round Table Pizza
- 2002: McDonald's
- 2001: T.G.I. Friday's
- 2000: Wyndham Hotels & Resorts
- 1999: Wolfgang Puck Cafe
- 1998: Cracker Barrel

Best Menu/Line Extension

- 2013: Noodles & Company: Slow Braised, Naturally Raised Pork
- 2012: Wendy's
- 2011: Shari's Restaurant & Pies
- 2010: Au Bon Pain
- 2009: Chick-fil-A
- 2008: Red Lobster
- 2007: Jack in the Box
- 2006: Boston Market
- 2005: Uno Chicago Grill
- 2004: IHOP
- 2003: Schlotzsky's Deli
- 2002: Panera Bread
- 2001: Subway Restaurants
- 2000: Domino's Pizza
- 1999: Popeye's Chicken & Biscuits
- 1998: California Pizza Kitchen

Best Menu Revamp

- 2013: Red Lobster
- 2012: Buffalo Wild Wings
- 2011: Old Chicago Pizza & Pasta
- 2010: Tropical Smoothie Cafe
- 2009: Pizza Hut
- 2008: O'Charley's
- 2007: Captain D's Seafood
- 2006: Ruby Tuesday
- 2005: Logan's Roadhouse
- 2004: Olive Garden
- 2003: Bob Evans
- 2002: Claim Jumper
- 2001: Bennigan's
- 2000: Denny's
- 1999: Stephen Anderson
- 1998: Legal Sea Foods

Best Menu Trendsetter

- 2013: Cooper's Hawk Winery & Restaurants: Asian BBQ Pork Belly Nachos
- 2012: Mama Fu's
- 2011: UMass Dining
- 2010: Burgerville

Best New Menu Item

- 2013: Taco Bell: Doritos Locos Tacos
- 2012: Sonic Corp.
- 2011: Panda Express
- 2010: Outback Steakhouse
- 2009: Culver's
- 2008: Maggiano's Little Italy
- 2007: Dunkin' Donuts
- 2006: California Pizza Kitchen
- 2005: Jack in the Box
- 2004: Famous Dave's
- 2003: P.F. Chang's China Bistro
- 2002: The Cheesecake Factory
- 2001: Champps
- 2000: Bob Evans
- 1999: Einstein Bros. Bagels
- 1998: Wendy's International

Chef/Innovator

- 2013: Jonathon Sawyer
- 2012: Stan Frankenthaler
- 2011: Scott Davis
- 2010: Brad Blum
- 2009: David Burke
- 2008: Paul Carr
- 2007: Cliff Pleau
- 2006: Dan Coudreaut
- 2005: Kurt Hankins
- 2004: Oona Settembre
- 2003: Robert Okura
- 2002: Stephen Anderson
- 2001: Johnny Law

Menu Masters Hall of Fame

- 2013: Chef José Andrés
- 2012: Jose Garces
- 2011: Tom Colicchio
- 2010: Jon Luther

- 2009: Wolfgang Puck
- 2008: Roger Berkowitz
- 2007: Burt Cutino
- 2006: Chef Emeril Lagasse
- 2005: David Overton
- 2004: Chef Martin Yan
- 2003: Paul Prudhomme
- 2002: Jasper White
- 2001: Richard Melman
- 2000: Jacques Pepin
- 1999: Colonel Sanders
- 1998: Warren LeRuth

107.3 Market Resources

Nation's Restaurant News, 249 W. 17th Street, New York, NY 10011. (212) 204-4200.
(www.nrn.com)

MICHELIN 3-STAR RESTAURANTS

108.1 Overview

Michelin published its first guide in 1900 in France. In 2005, The Michelin Guide expanded to include the U.S., with a guide to New York. Guides for San Francisco and Chicago have also been introduced.

Beginning in 1926, Michelin began reviewing and rating restaurants with 1-star, 2-star, and 3-star ratings. This chapter presents the 3-star-rated restaurants in Chicago, New York, and San Francisco for 2013.

108.2 Chicago 3-Star Restaurant

- Alinea

108.3 New York 3-Star Restaurants

- Chef's Table at Brooklyn Fare (Brooklyn)
- Daniel
- Eleven Madison Park
- Jean Georges
- Le Bernardin
- Masa
- Per Se

108.4 San Francisco 3-Star Restaurants

- The French Laundry (Napa region)
- The Restaurant at Meadowood (Napa region)

PLATINUM FORK AWARDS

109.1 Overview

Since 1994, “Where The Locals Eat” and LocalEats (www.localeats.com) dining guides have featured locally owned restaurants across America. The guides select the best restaurants in 15 categories, designating them with Platinum Fork Awards.

109.2 Top American Traditional Restaurants

- Blueberry Hill (St. Louis, MO)
- Bob Heilman’s Beachcomber Restaurant (Clearwater, FL)
- Bonnie Brae Tavern (Denver, CO)
- Fat City Bar and Cafe (Sacramento, CA)
- Lamb’s Grill Café (Salt Lake City, UT)
- Niki’s West (Birmingham, AL)
- Redrock Canyon Grill (Oklahoma City, OK)
- Root Five Waterfront (Hamburg, NY)
- The Majestic Grille (Memphis, TN)
- The Old Mohawk (Columbus, OH)

109.3 Top Barbecue Restaurants

- Bill Spoon’s Barbecue (Charlotte, NC)
- Central BBQ (Memphis, TN)
- Clyde Cooper’s Barbecue (Raleigh, NC)
- Everette and Jones Barbecue (Oakland, CA)
- Goode Co Texas Bar-B-Que (Houston, TX)
- Oklahoma Joe’s Barbecue (Kansas City, MO)
- Pappy’s Smokehouse (St. Louis, MO)
- Smoque BBQ (Chicago, IL)
- Sonny Bryan’s Smokehouse (Dallas, TX)
- The Bar-B-Q Shop (Memphis, TN)

109.4 Top Burgers

- Barney’s Gourmet Hamburgers (Berkeley, CA)
- Becks Prime (Houston, TX)

- Convention Grill (Edina, MN)
- Delux (Phoenix, AZ)
- Grover's Bar & Grill (East Amherst, NY)
- Heck's Café (Cleveland, OH)
- Hires Big H Drive-In (Salt Lake City, UT)
- Kincaid's Hamburgers (Fort Worth, TX)
- Kuma's Corner (Fort Worth, TX)
- O'Connell's Pub (St. Louis, MO)
- Tessaro's (Pittsburgh, PA)

109.5 Top Chinese Restaurants

- Boading (Charlotte, NC)
- Bo Lings (Kansas City, M)
- Chef Chu's (Los Altos, CA)
- Frank Fat's (Sacramento, CA)
- Fung' Kitchen (Houston, TX)
- Hee Hing Restaurant (Honolulu, HI)
- Sang Kee Peking Duck House (Philadelphia, PA)
- Shanghai Garden (Seattle, WA)
- Shun Lee Palace (New York, NY)
- Wing Lei (Las Vegas, NV)

109.6 Top Deli's

- Carson Street Deli (Pittsburgh, PA)
- Corti Brothers (Sacramento, CA)
- Katz's Delicatessen (New York, NY)
- Katzinger's Delicatessen (Columbus, OH)
- Kenny & Zuke's Delicatessen (Portland, OR)
- Kenny and Ziggy's (Houston, TX)
- Langer's Delicatessen (Los Angeles, CA)
- Manny's Coffee Shop & Deli (Chicago, IL)
- Muss & Turner's (Smyrna, GA)
- Shapiro's Delicatessen (Indianapolis, IN)

109.7 Top Diners

- Big Al's Diner (Cleveland, OH)
- Big Pink (Miami Beach, FL)
- The Camellia Grill (New Orleans, LA)
- EJ's Luncheonette (New York, NY)
- Highland Park Diner (Rochester, NY)

- Johnny's Grill (El Reno, OK)
- Lake Effect Diner (Buffalo, NY)
- Peppermill (Las Vegas, NV)
- Rotier's (Nashville, TN)
- Ruth's Diner (Salt Lake City, UT)
- Star Seeds Café (Austin, TX)
- The Original Pantry Cafe (Los Angeles, CA)

109.8 Top French Restaurants

- Bouley (New York, NY)
- Daniel (New York, NY)
- La Folie (San Francisco, CA)
- La Mer (Honolulu, HI)
- La Petite Grocery (New Orleans, LA)
- Le Pigeon (Portland, OR)
- Le Relais (Louisville, KY)
- Rue Franklin (Buffalo, NY)
- The French Room (Dallas, TX)
- Vincent (Minneapolis, MN)

109.9 Top Italian Restaurants

- Babbo (New York, NY)
- Biba (Sacramento, CA)
- Bottega Restaurant and Cafe (Birmingham, AL)
- Caffè Mingo (Portland, OR)
- Da Marco (Houston, TX)
- Delfina (San Francisco, CA)
- Roma Cafe (Detroit, MI)
- Spiaggia (Chicago, IL)
- Trattoria Marcella (St. Louis, MO)
- Vespaio (Austin, TX)
- Vetri (Philadelphia, PA)

109.10 Top Japanese/Sushi Restaurants

- Japonais (Chicago, IL)
- Kihachi Japanese Restaurant (Dublin, OH)
- Matsuhisa (Beverly Hills, CA)
- Matsuri (Baltimore, MD)
- O-Ya (Boston, MA)
- Osaka Japanese Bistro (Las Vegas, NV)

- Morimoto (Philadelphia, PA)
- Sushi Taro (Washington, DC)
- Uchi (Austin, TX)
- Umi (Pittsburgh, PA)

109.11 Top Mexican Restaurants

- Babita Mexicuisine (San Gabriel, CA)
- Barrio Cafe (San Gabriel, CA)
- Dona Tomas (Oakland, CA)
- Fonda San Miguel (Austin, TX)
- Frontera Grill (Chicago, IL)
- Hugo's (Houston, TX)
- Luchita's (Cleveland, OH)
- Nopalito (San Francisco, CA)
- Nuevo Leon (Fort Worth, TX)
- Ortega's, A Mexican Bistro (San Diego, CA)

109.12 Top Pizza In America

- A16 (San Francisco, CA)
- Casa Bianca (Los Angeles, CA)
- Lou Malnati's Pizzeria (Chicago, IL)
- Mineo's Pizza House (Pittsburgh, PA)
- Osteria Mozza (Los Angeles, CA)
- Piece Brewery & Pizzeria (Chicago, IL)
- Pizza Luce (Minneapolis, MN)
- Pizzeria Bianco (Phoenix, AZ)
- Tacconelli's Pizzeria (Philadelphia, PA)
- Tommy's Pizza (Columbus, OH)

109.13 Top Seafood Restaurants

- 15th Street Fisheries & Dockside Café (Ft. Lauderdale, FL)
- Frenchy's Original Café (Clearwater, FL)
- Le Bernardin (New York, NY)
- Mama's on the Half Shell (Baltimore, MD)
- Quinn's (Miami Beach, FL)
- Ray's Boathouse Restaurant and Café (Seattle, WA)
- Swan Oyster Depot (San Francisco, CA)
- The Blue Fish (Jacksonville, FL)
- The Fish Market (San Diego, CA)
- Z's Oyster Bar & Steakhouse (Louisville, KY)

109.14 Top Soul Food Restaurants

- Alcenia's (Memphis, TN)
- Busy Bee Cafe (Atlanta, GA)
- Gullah Cuisine (Mount Pleasant, SC)
- Mrs White's Golden Rule Café (Phoenix, AZ)
- Papa Lew's (Kansas City, MO)
- Prince's Hot Chicken Shack (Nashville, TN)
- Roscoe's House of Chicken 'n Waffles (Los Angeles, CA)
- Sweetie Pie's (St. Louis, MO)
- Swett's (Nashville, TN)
- The Praline Connection (New Orleans, LA)

109.15 Top Steakhouses

- Angus Barn (Raleigh, NC)
- Bern's Steak House (Tampa, FL)
- Bone's (Atlanta, GA)
- Cattlemen's Steakhouse (Oklahoma City, OK)
- Charley's Steak House (Orlando, FL)
- CUT (Beverly Hills, CA)
- Gibson's Bar & Steakhouse (Chicago, IL)
- RingSide Steakhouse (Portland, OR)
- St. Elmo Steak House (Indianapolis, IN)
- The Prime Rib (Baltimore, MD)

109.16 Top Vegetarian Restaurants

- Blue Sage Vegetarian Grille (Southampton, PA)
- Cafe Flora (Seattle, WA)
- Dirt Candy (New York, NY)
- Green Zebra (Chicago, IL)
- Greens (San Francisco, CA)
- Real Food Daily (Los Angeles, CA)
- Spiral Diner & Bakery (Fort Worth, TX)
- The Mustard Seed (Mt. Pleasant, SC)
- Tin Shed (Portland, OR)
- Tommy's (Cleveland Heights, OH)

RESTAURANT NEIGHBOR AWARD

110.1 Award Winners 2013

According to the National Restaurant Association (www.restaurant.org), 90% of restaurants give back to the local communities which they serve through charitable activities, each donating time or money to an average of 35 projects annually.

The following restaurant operators were recognized by the National Restaurant Association in 2013 for their community-focused contributions:

Arizona

- Flancer's (Gilbert)
- Valle Luna Mexican Restaurants (Phoenix)
- White Chocolate Grill (Scottsdale)

Arkansas

- Judy Adams, Catering to You (Little Rock)

California

- Baker's Burger, Inc (San Bernardino)
- Black Bear Diners, Inc. (Redding)
- Canter's Fairfax (Los Angeles)
- Daphne's California Greek (Carlsbad)
- El Pollo Loco (Mesa)
- Jamba Juice (Emeryville)
- Prado/Cohn Restaurant Group (San Diego)
- The Reef (Specialty Restaurants Corporation) (Long Beach)
- SoCo Hospitality Group (Santa Rosa)
- Universal Studios Hollywood (Universal City)

Colorado

- Amicas (Salida)

Delaware

- High 5 Hospitality d.b.a. Buffalo Wild Wings (Bear)
- Iron Hill Brewery & Restaurant (Wilmington)
- Matt Haley, So Del Concepts (Rehoboth Beach)

District of Columbia

- RIS (Washington)
- Rocklands Barbeque and Grilling Company (Washington)

Florida

- 101 Restaurant (Tallahassee)
- Broken Egg of Lakewood Ranch (Lakewood Ranch)
- Gecko's Grill & Pub: Michael Quillen (Sarasota)
- Little Greek Restaurant (Tampa)
- Tony Roma's (Orlando)

Georgia

- Unsukay Concepts (Atlanta)

Hawaii

- Da Kitchen Cafe (Kahului)
- Papa John's Hawaii (Honolulu)

Indiana

- Eddie Merlot's Prime Aged Beef and Seafood (Fort Wayne)
- Santorini Greek Kitchen (Indianapolis)
- Scotty's Brewhouse (Indianapolis)

Iowa

- Dos Rios/Big City Burgers and Greens/Catering Des Moines (Des Moines)
- ISU Dining (Ames)

Kansas

- LDF Food Group, Inc.: Wendy's (Wichita)
- Original Bread Inc./Panera Bread of Kansas (Prairie Village)
- PJ Wichita, LLC (Wichita)
- Warren Theatres (Wichita)

Louisiana

- Baton Rouge Concessions: Marc Pater (Baton Rouge)
- Café Giovanni: Duke LoCicero (New Orleans)
- Santa Fe Cattle Company (Hammond)

Maine

- Personal Touch Catering (Buxton)

Maryland

- CarterQue BBQ & Grilling Co. (Mount Airy)
- Ledo Pizza/Pasadena (Pasadena)
- The Greene Turtle Sports Bar & Grille (Edgewater)

Massachusetts

- Boloco (Boston)
- Ninety Nine Restaurants (Woburn)
- The Elephant Walk (Waltham)

Michigan

- Buddy's Pizza (Farmington Hills)
- One Trick Pony: Dan Verhil (Grand Rapids)

Minnesota

- Keys Café & Bakery (Roseville)
- Lake Elmo In (Lake Elmo)
- Morrissey Hospitality Companies, Inc. (Saint Paul)
- Pub 500 (Mankato)

Mississippi

- Fat Mama's Tamales (Natchez)
- New South Restaurant Group (Hattiesburg)
- The Shed BBQ & Blues Joint (Ocean Springs)

Missouri

- Cook's Kettle (Springfield)
- Jazz, A Louisiana Kitchen (Kansas City)
- Jimm's Steakhouse and Pub (Springfield)
- The Pasta House Co. (Union)

Montana

- Buffalo Wild Wings (Billings)

Nebraska

- Cappy's Hotspot Bar & Grill/Nightclub (Lincoln)
- Dish (Lincoln)
- Runza Restaurants (Lincoln)
- Wheatfields Eater & Bakery (Omaha)

Nevada

- Firefly Tapas Kitchen & Bar (Las Vegas)
- Las Vegas Mini Gran Prix (Las Vegas)
- McDonald's (Las Vegas)

New Hampshire

- Great New Hampshire Restaurants (Bedford)
- Margaritas Mexican Restaurant (Portsmouth)
- Patrick's Pub & Eatery (Gilford)
- The Common Man (Ashland)

New Jersey

- 9th And Coles Tavern (Jersey City)
- Brookside Tavern (Dumont)
- Doherty Enterprises, Inc. (Allendale)
- Labrador Lounge: Marilyn Schlossbach (Normandy Beach)
- McLoone's Restaurants (Eatontown)

New Mexico

- Black Mesa Coffee Company (Albuquerque)

New York

- Benchmark Restaurants (New York)
- T. L Cannon Applebee's (Williamsville)
- Thee Green Table/The Cleaver Co. (New York)
- Witchcraft (New York)

North Carolina

- Bojangles' Restaurants, Inc. (Charlotte)
- Roko Italian Cuisine (Raleigh)
- Uncle Bucks All American Pub & Grub (Salisbury)

Ohio

- Gold Star Chili, Inc. (Cincinnati)
- Real Seafood Company (Toledo)
- Roosters Restaurants (Dublin)
- Rusty Bucket Restaurant and Tavern (Columbus)
- Victoria Brewing Company (Yellow Springs)
- White Castle System, Inc. (Columbus)

Oklahoma

- Joe's Addiction (Oklahoma City)
- O'Connell's Irish Pub & Grille (Norman)
- Orange Leaf Frozen Yogurt (Oklahoma City)

Oregon

- Baked Alaska (Astoria)
- Café 440 (Eugene)

- Milo's City Cafe (Portland)
- Southern Oregon Elmer's (Grants Point)

Pennsylvania

- Fox's Pizza Den (Punxsutawney)
- The Rose Group (Newtown)
- Victory Brewing Company (Downingtown)

Rhode Island

- Gracie's (Providence)
- T's Restaurant (Cranston)

South Carolina

- High Cotton Charleston (Charleston)

South Dakota

- Dairy Queen: Mark DeLeon (Madison)

Tennessee

- Huey's Restaurant (Memphis)
- The Copper Cellar (Knoxville)

Texas

- Cordua Restaurants (Houston)
- Parigi (Dallas)
- Taco Cabana (San Antonio)

Utah

- Les Madeleines (Salt Lake City)
- Utah Del Taco (Salt Lake City)

Vermont

- Browns Market Bistro (Groton)
- Norma's Topnotch Resort and Spa (Stowe)

Virginia

- Glory Days Grill (Gaithersburg)
- Great American Restaurants (Falls Church)

Washington

- The Boat Shed Restaurant (Bremerton)

Wisconsin

- Liberty Hall Conference Center (Kimberly)
- PJD Investments dba. Toppers Pizza (Lacrosse)
- The Nitty Gritty: Marsh Shapiro (Madison)
- Wisconsin Hospitality Group dba Applebee's & Pizza Hut (Wauwatosa)

Wyoming

- Signal Mountain Lodge (Moran)

SELECTIONS: BON APPÉTIT

111.1 Overview

Bon Appétit magazine regularly compiles various lists of top food and beverages as well as restaurants and snack shops throughout the U.S. The following are the most recent lists:

111.2 Best Restaurant and Snack Shops Selections

Best Cakes

- Alexis Baking Company (Napa, CA)
Menu item: Blum's Coffee Crunch Cake
- Betty Bakery (Brooklyn, NY)
Menu item: Lemon Cake
- Cordúa restaurants (multiple locations)
Menu item: Churrascos Tres Leches Cake
- Crixá (Berkeley, CA)
Menu item: Black Forest Cake
- Ken's Artisan Bakery (Portland, OR)
Menu item: Canelés
- Lady M (New York, NY)
Menu item: Mille Crêpes Cake
- Macrina (Seattle, WA)
Menu item: Red Velvet Cake
- Miette (San Francisco, CA)
Menu item: Tomboy Cake
- Peninsula Grill (Charleston, SC)
Menu item: Coconut Layer Cake
- Salty Tart (Minneapolis, MN)
Menu item: White Chocolate Lemon Blueberry Cake

Best Coffeeshops

- Abraço (New York, NY)
- Four Barrel Coffee (San Francisco, CA)
- Kopplin's Coffee (Saint Paul, MN)
- Lamill Coffee (Los Angeles, CA)

- Little T American Baker (Portland, OR)
- Novo (Denver, CO)
- Octane Coffee Bar & Lounge (Atlanta, GA)
- Peregrine Espresso (Washington, DC)
- Progress Coffee (Austin, TX)
- The Coffee Studio (Chicago, GA)

Best Destination Diners

- 24 Diner (Austin, TX)
Menu item: Roasted banana and brown sugar milk shake
- Bite Café (Chicago, IL)
Menu item: Breakfast poutine
- Citizen's Band (San Francisco, CA)
Menu item: Braised pork belly and egg
- Crossroads Diner (Dallas, TX)
Menu item: Pickle-juice egg salad sandwich
- M. Wells (Long Island City, NY)
Menu item: Foie gras grilled cheese
- Nickel Diner (Los Angeles, CA)
Menu item: Maple-bacon doughnut

Best Doughnut Shops

- Bouchon Bakery (Yountville, CA)
- Coffee An' Donut Shop (Westport, NY)
- Dat Donuts (Chicago, IL)
- Doughnut Plant (New York, NY)
- Dynamo Donuts (San Francisco, CA)
- Kane's Donuts (Saugus, MA)
- Mighty-O Donuts (Seattle, WA)
- Randy's Donuts (Inglewood, CA)
- Round Rock Donuts (Round Rock, TX)
- The Donut Stop (St. Louis, MO)
- Voodoo Doughnut (Portland, OR)

Best Germanic Restaurants

- Bar Tartine (San Francisco, CA)
- Cafe Katja (New York, NY)
- Frankford Hall (Philadelphia, PA)
- Gruner (Portland, OR)
- Leopold's (San Francisco, CA)
- Prime Meats (Brooklyn, NY)
- Seasonal (New York, NY)

Best Lobster Rolls

- Blue Plate Oysterette (Santa Monica, CA)
- Brick Alley Pub & Restaurant (Newport, RI)
- JCT Kitchen & Bar (Atlanta, GA)
- Perla Seafood & Oyster Bar (Austin, TX)
- Red Hook Lobster Pound (Washington, DC)
- Smack Shack Lobster (Minneapolis, MN)

Best New Jewish Delis

- Mile End Delicatessen (New York, NY)
- Rye Delicatessen & Bar (Minneapolis, MN)
- Stopsky's Delicatessen (Mercer Island, WA)
- Wise Sons Jewish Delicatessen (San Francisco, CA)

Best New Sushi Restaurants

- Arami (Chicago, IL)
- Bamboo Sushi (Portland, OR)
- Brushstroke (New York, NY)
- Kome Sushi Kitchen (Austin, TX)
- Masa Sushi & Robata (Minneapolis, MN)
- Miyake (Portland, ME)
- Shunji (Los Angeles, CA)
- Sushi Kappo Tamua (Seattle, WA)
- Tomo (Atlanta, GA)
- Uchi (Houston, TX)

Best Restaurants For Celebrity Sightings In Los Angeles

- Animal
- Cut
- Dan Tana's
- Joan's on Third
- Katsuya by Starck Hollywood
- Madeo
- Soho House
- The Bazaar by José Andrés
- The Polo Lounge
- The Tower Bar

Best Restaurants For Celebrity Sightings In New York

- ABC Kitchen
- Acme
- Bar Pitti
- Locando Verde
- Marlow & Sons

- Spice Market
- Super Linda
- The Dutch
- The Spotted Pig
- The Waverly Inn

SELECTIONS: DINERS, DRIVE-INS & DIVES

112.1 Overview

Featuring host Guy Fieri visiting some of America's most interesting and unique restaurants, the Food Network has telecast the series *Diners, Drive-Ins and Dives* since 2006. A list of restaurants featured in the show are presented in this chapter.

112.2 List Of Featured Restaurants

Alabama

- Gumbo Shack (Fairhope)
- Mancini's Antique Club (Daphne)
- Panini Pete's (Fairhope)

Arizona

- Aunt Lena's Creamery (Chandler)
- Barrio Cafe (Phoenix)
- Brandy's Restaurant & Bakery (Flagstaff)
- Chino Bandido (Phoenix)
- Curry Corner (Tempe)
- Duce (Phoenix)
- Giuseppe's Italian Kitchen (Phoenix)
- Haus Murphy's (Glendale)
- Joe's Farm Grill (Gilbert)
- La Piazza Al Forno (Glendale)
- Los Taquitos Grill (Phoenix)
- Matt's Big Breakfast (Phoenix)
- Over Easy (Phoenix)
- Perk Eatery (Scottsdale)
- Roberto's Mexican Food (Phoenix)
- Salsa Brava (Flagstaff)
- St. Francis Restaurant (Phoenix)
- Thee Pitts Again (Glendale)

California

- 900 Grayson Restaurant (Berkeley)

- Aldo's Harbor Restaurant (Santa Cruz)
- At Last Cafe (Long Beach)
- Aunt Mary's Cafe (Oakland)
- Baby Blues BBQ (Venice)
- Beer Belly (Los Angeles)
- Bette's Oceanview Diner (Berkeley)
- Bless My Soul Cafe (Eureka)
- Bludso's BBQ (Compton)
- Blue Water Seafood Market & Grill (San Diego)
- Brats Brothers (Sherman Oaks)
- Brick & Fire Bistro (Eureka)
- Broken Record (San Francisco)
- Bubba's Diner (San Anselmo)
- Burger Me (Truckee)
- Cafe Citti (Kenwood)
- Cafe Noonan (Eureka)
- Cafe Rolle (Sacramento)
- Catelli's (Geyserville)
- Chili John's (Burbank)
- Chomp Chomp Nation (Orange County)
- Clendenen's Cider Works (Fortuna)
- Crest Cafe (San Diego)
- Dad's Kitchen (Sacramento)
- Don Chow Tacos (Santa Monica)
- Dottie's True Blue Cafe (San Francisco)
- Duarte's Tavern (Pescadero)
- El Indio (San Diego)
- Emma Jean's Holland Burger Cafe (Victorville)
- Fab Hot Dogs (Reseda)
- Falafel's Drive-In (San Jose)
- Ferndale Meat Co. (Ferndale)
- Gaffey Street Diner (San Pedro)
- Gatsby's Diner (Sacramento)
- Giusti's (Walnut Grove)
- Gloria's Cafe (Los Angeles)
- Golden State (Los Angeles)
- Gorilla Barbeque (Pacifica)
- Grubstake Diner (San Francisco)
- HRD Coffee Shop (San Francisco)
- Haggio's Organic Taco (Encinitas)
- Hank's Creekside Restaurant (Santa Rosa)
- Hob Nob Hill (San Diego)
- Hodad's (Ocean Beach)
- Hotel Ivanhoe (Ferndale)

- Humboldt Sweets Bakery Cafe (Ferndale)
- Jamie's Bar & Grill (Sacramento)
- Jax at the Tracks (Truckee)
- Jay Bee's Bar-B-Que (Gardena)
- Jimtown Store (Healdsburg)
- Joe's Cable Car (San Francisco)
- Johnny Garlic's (Santa Rosa)
- Koja Kitchen (San Francisco)
- La Texanita (Santa Rosa)
- Lito's Mexican Restaurant (Santa Barbara)
- Live From New York Pizza (Eureka)
- Loleta Cheese Factory (Loleta)
- Mac's Fish & Chip Shop (Santa Barbara)
- Mad Greek's Diner (Baker)
- Mama Cozza's (Anaheim)
- Mambo's Cafe (Glendale)
- Meal Ticket (Berkeley)
- Miller's East Coast Deli (San Francisco)
- Mom's Tamales (Los Angeles)
- Naglee Park Garage (San Jose)
- Nickel Diner (Los Angeles)
- Nopalito (San Francisco)
- North End Caffe (Manhattan Beach)
- Norton's Pastrami & Deli (Santa Barbara)
- OB Noodle House (San Diego)
- Patrick's Roadhouse (Santa Monica)
- Paul's Coffee Shop (Fountain Valley)
- Pete's Breakfast House (Ventura)
- Pica Pica Maize Kitchen (San Francisco)
- Pier 23 Cafe (San Francisco)
- Pizzeria Luigi (San Diego)
- Polka Restaurant & Catering (Los Angeles)
- Putah Creek Cafe (Winters)
- Q Restaurant (San Francisco)
- Ramona Cafe (Ramona)
- Refuge (San Carlos)
- Rick & Ann's Restaurant (Berkeley)
- Rocco's Cafe (San Francisco)
- Rudy's Can't Fail Cafe (Emeryville)
- Santa Cruz Diner (Santa Cruz)
- Savoy Cafe & Deli (Santa Barbara)
- Schellville Grill (Sonoma)
- Schooner or Later (Long Beach)
- Senor Sisig (San Francisco)

- Show Dogs (San Francisco)
- Sol Food Puerto Rican Cuisine (San Rafael)
- Spiritos Italian Diner (Carlsbad)
- Studio Diner (San Diego)
- Squeeze Inn (Sacramento)
- Sunflower Caffe (Sonoma)
- Taylor's Automatic Refresher (St. Helena)
- Tee Off Bar & Grill (San Francisco)
- The Awesom Pretzel Cart (Ferndale)
- The Front Porch (San Francisco)
- The Golden Bear (Sacramento)
- The Golden State (Los Angeles)
- The Kitchen (Oxnard)
- The Oinkster (Eagle Rock)
- The Russian River Pub (Forestville)
- Tioli's Crazee Burger (San Diego)
- Tommy's Joynt (San Francisco)
- W.O.W - Worth Our Weight (Santa Rosa)
- Willie Bird's Restaurant (Santa Rosa)

Colorado

- A Taste of Home Cooking (Arvada)
- Atomic Cowboy (Denver)
- Bang! (Denver)
- Cora Faye's Cafe (Denver)
- Foolish Craig's Cafe (Boulder)
- Highland Tavern (Denver)
- Hops & Pie (Denver)
- Lauer-Krauts (Brighton)
- Prohibition (Denver)
- Sam's No. 3 (Denver)
- Steuben's Food Service (Denver)
- The Bagel Delicatessen & Restaurant (Denver)
- The Sink (Boulder)
- Tocabe American Indian Eatery (Denver)

Connecticut

- Black Duck Cafe (Westport)
- Corey's Catsup and Mustard (Manchester)
- Merritt Canteen Inc (Bridgeport)
- O'Rourke's Diner (Middletown)
- Super Duper Weenie (Fairfield)
- Valencia Luncheria (Norwalk)
- Wilson's Holy Smoke BBQ (Fairfield)

District of Columbia

- Comet Ping Pong (Washington)
- Oohhs & Aahhs Gourmet Deli (Washington)
- Tortilla Cafe (Washington)
- Tune Inn Restaurant & Bar (Washington)

Florida

- 11th Street Diner (Miami Beach)
- 13 Gypsies (Jacksonville)
- Alpine Steakhouse (Sarasota)
- Bad Boy Burrito (Key West)
- Benny's Seafood Restaurant (Miami)
- Blue Collar (Miami)
- Blue Marlin Fish House Restaurant (North Miami Beach)
- California Tacos To Go (Tampa)
- Culhane's Irish Pub (Atlantic Beach)
- Danny's All-American Diner (Tampa)
- DJ's Clam Shack (Key West)
- Flakowitz of Boynton Bakery & Deli Restaurant (Boynton Beach)
- Garbo's Grill Food Cart (Key West)
- Grampa's Bakery & Restaurant (Dania Beach)
- Havana Hideout (Lake Worth)
- Jamaica Kitchen (Miami)
- Jose's Real Cuban Food (Bradenton)
- Keegan's Seafood Grille (Indian Rocks Beach)
- La Camaronera Restaurant & Fish Market (Miami)
- Latin House: Burger & Taco Bar (Miami)
- Metro Diner (Jacksonville)
- Munch's Restaurant & Sundries (St. Petersburg)
- Sakaya Kitchen (Miami)
- Scully's Tavern (Miami)
- Singleton's Seafood Shack (Atlantic Beach)
- Sonny's Famous Steak Hogies (Hollywood)
- Taco Bus (Tampa)
- Tampa Bay Brewing Co. (Tampa)
- Tap Tap Haitian Restaurant (Miami Beach)
- Ted Peters Famous Smoked Fish (South Pasadena)
- The Federal Food Drink & Provisions (Miami)
- Whale's Rib (Deerfield Beach)
- Whisk Gourmet (Miami)

Georgia

- Blackwater Grill (St. Simons Island)

- Cabbagetown Market (Atlanta)
- Colonnade (Atlanta)
- Marietta Diner (Marietta)
- Matthews Cafeteria (Tucker)
- Southern Soul Barbeque (St. Simons Island)
- The Highlander (Atlanta)
- The Silver Skillet (Atlanta)

Hawaii

- Big Wave Shrimp Truck (Haleiwa)
- Camille's on Wheels (Kailua)
- Fresh Catch (Honolulu)
- Germaine's Luau (Kapolei)
- Hank's Haute Dogs (Honolulu)
- He'eia Kea Pier Deli (Kaneohe)
- Highway Inn & Ho'okipa Catering (Waipahu)
- Jawaiian Irie Jerk (Honolulu)
- Murphy's Bar & Grill (Honolulu)
- Nico's Pier 38 (Honolulu)
- Opal Thai Food (Haleiwa)
- Poke Stop Mililani-Mauka LLC (Mililani)
- Rainbow Drive-In (Honolulu)
- Sweet Home Waimanalo (Waimanalo)

Idaho

- Bar Gernika (Boise)
- Capone's Pub (Coeur d'Alene)
- Chef Lou's Westside Drive-In (Boise)
- Donn's Hilltop Kodiak Grill (Boise)
- Donnie Mac's Trailer Park Cuisine (Boise)
- Jimmy's Down the Street (Coeur d'Alene)
- Pizzalchik (Boise)
- Rick's Press Room Grill & Bar (Meridan)

Illinois

- 90 Miles Cuban Cafe (Chicago)
- Big & Littles (Chicago)
- Bop N Grill (Chicago)
- Cemitas Puebla (Chicago)
- Charlie Parker's (Springfield)
- Chicago Brauhaus (Chicago)
- Chilam Balam (Chicago)
- Chuck's Southern Comforts Cafe (Burbank)
- DMK Burger Bar (Chicago)

- Dell Rhea's Chicken Basket (Willowbrook)
- Frosted Mug (Alsip)
- Galewood Cookshack (Chicago)
- Garifuna Flava (Chicago)
- Glenn's Diner (Chicago)
- Hackney's (Glenview)
- Honky Tonk BBQ (Chicago)
- Hopleaf Bar (Chicago)
- Irazu (Chicago)
- Kuma's Corner (Chicago)
- Nana Organic (Chicago)
- Panozzo's Italian Market (Chicago)
- Paradise Pup (Des Plaines)
- Rex Italian Foods (Norridge)
- Smoque (Chicago)
- Taste of Peru (Chicago)
- The Depot American Diner (Chicago)
- The Original Vito & Nick's Pizzeria (Chicago)
- The Shanty (Wadsworth)
- Tre Kronor (Chicago)
- Tufano's Vernon Park Tap (Chicago)
- White Palace Grill (Chicago)

Indiana

- 3 Sisters Cafe (Indianapolis)
- Indy's Historic Steer-In Restaurant (Indianapolis)
- Jersey's Cafe (Carmel)
- South Side Soda Shop (Goshen)
- The Barking Dog (Indianapolis)
- The Tamale Place (Indianapolis)
- Triple XXX Restaurant (West Lafayette)
- Zest (Indianapolis)
- Zydeco's (Mooreville)

Kansas

- BBQ Shack (Paola)
- Bobo's Drive In (Topeka)
- Brint's Diner (Wichita)
- Cafe on the Route (Baxter Springs)
- Johnny's Bar-B-Q (Mission)
- RJ's Bob-Be-Que Shack (Mission)
- Woodyard Bar-B-Que (Kansas City)

Kentucky

- J.J.McBrewster's (Lexington)
- Parkette Drive In (Lexington)
- Rick's White Light Diner (Frankfort)
- Smokey Valley Truck Stop (Olive Hill)
- Virgil's Cafe (Bellevue)
- Wallace Station (Versailles)

Louisiana

- Casamento's Restaurant (New Orleans)
- Joey K's Restaurant & Bar (New Orleans)
- Katie's Restaurant (New Orleans)
- La Pines Cafe (Slidell)
- Louie & the Redhead Lady (Mandeville)
- Mahony's Po-Boy Shop (New Orleans)
- Parasol's Bar & Restaurant (New Orleans)
- Sammy's Food Service & Deli (New Orleans)
- Surrey's Cafe (New Orleans)
- The Creole Creamery - Uptown (New Orleans)
- The Joint (New Orleans)
- The Old Coffee Pot Restaurant (New Orleans)
- The Rivershack Tavern (Jefferson)

Maine

- A1 Diner (Gardiner)
- Becky's Diner (Portland)
- Bob's Clam Hut (Kittery)
- Maine Diner (Wells)
- Porthole Restaurant (Portland)

Maryland

- Blue Moon Cafe (Baltimore)
- Boulevard Diner (Dundalk)
- Brick Oven Pizza (Baltimore)
- Broadway Diner (Baltimore)
- Chaps Pit Beef (Baltimore)
- Davis' Pub (Annapolis)
- Di Pasquale's (Baltimore)
- G&A Restaurant (Baltimore)
- Galway Bay Irish Pub (Annapolis)
- Joe Squared Pizza (Baltimore)
- R&R Taqueria (Elkridge)
- Sip & Bite Restaurant (Baltimore)

- Stoney Creek Inn (Greenland Beach)
- The General Store (Silver Spring)

Massachusetts

- Angela's Cafe (East Boston)
- Boston Beer Company (Boston)
- Charlie's Diner (Spencer)
- Cutty's (Brookline)
- Greek Corner Restaurant (Cambridge)
- Italian Express Pizzeria (Boston)
- JT Farnham's Seafood & Grill (South Essex)
- Kelly's Diner (Somerville)
- Mike's City Diner (Boston)
- Morin's Hometown Bar & Grille (Attleboro)
- Mr. Bartley's Gourmet Burgers (Cambridge)
- Patti's Pierogis (Fall River)
- Rino's Place (East Boston)
- Sam LaGrassa's (Boston)
- The Little Depot Diner (Peabody)
- The Lobster Shanty (Salem)
- Tupelo (Cambridge)
- Yankee Lobster Company Restaurant (Boston)

Michigan

- Clarkston Union Bar & Kitchen (Village of Clarkston)
- Joe's Gizzard City (Potterville)
- Krazy Jim's Blimpy Burger (Ann Arbor)
- Michigan Brewing Co. (Webberville)
- Polish Village Cafe (Hamtramck)
- Rosie's Diner (Rockford)
- Supino Pizzeria (Detroit)
- The Fly Trap (Ferndale)
- Traffic Jam & Snug (Detroit)
- Union Woodshop (Clarkston)

Minnesota

- Al's Breakfast (Minneapolis)
- At Sara's Table Chester Creek Cafe (Duluth)
- Broders' Cucina Italiana (Minneapolis)
- Bryant-Lake Bowl (Minneapolis)
- Casper & Runyon's Nook (Saint Paul)
- Colossal Cafe (Minneapolis)
- Donatelli's (White Bear Lake)
- Duluth Grill (Duluth)

- Emily's Lebanese Delicatessen (Minneapolis)
- Gordy's Hi-Hat (Cloquet)
- Kramarczuk's (Minneapolis)
- Marla's Caribbean Cuisine (Minneapolis)
- Modern Cafe (Minneapolis)
- Northern Waters Smokehaus (Duluth)
- Nye's Polonaise Room (Minneapolis)
- Pizzeria Lola (Minneapolis)
- Psycho Suzie's Motor Lounge (Minneapolis)
- Q fanatic BBQ (Champlin)
- Smack Shack at The 1029 Bar (Minneapolis)
- Smalley's Caribbean Barbeque (Stillwater)
- The Blue Door Pub (Saint Paul)
- The Nook (Saint Paul)
- The Wienery (Minneapolis)
- Town Talk Diner (Minneapolis)
- Victor's 1959 Cafe (Minneapolis)

Mississippi

- Blow Fly Inn (Gulfport)
- Darwell's Cafe (Long Beach)
- Memphis Barbecue Co. (Horn Lake)
- Memphis Street Cafe (Hernando)
- The Shed Barbecue & Blues Joint (Ocean Springs)

Missouri

- Anthonino's Taverna (St. Louis)
- BB's Lawnside Blues and BBQ (Kansas City)
- Blue Koi (Kansas City)
- Cupini's (Kansas City)
- Danny Edwards Boulevard BBQ (Kansas City)
- Dressel's Public House (St. Louis)
- Espino's Mexican Bar & Grill (Chesterfield)
- Grinders (Kansas City)
- Guerrilla Street Food (St. Louis)
- Happy Gillis Cafe & Hangout (Kansas City)
- Highway 61 Roadhouse and Kitchen (St. Louis)
- Iron Barley (St. Louis)
- Mama's 39th Street (Kansas City)
- Pot Pie (Kansas City)
- Smokin' Guns BBQ (North Kansas City)
- Succotash (Kansas City)
- Swagger Fine Spirits and Food (Kansas City)
- Sweetie Pie's (St. Louis)

- The Brick (Kansas City)
- YJ's Snack Bar (Kansas City)

Nebraska

- Amato's (Omaha)
- Big Mama's Kitchen & Catering (Omaha)
- Brewburger's (Omaha)
- California Tacos (Omaha)
- Dixie Quicks (Omaha)
- Joe Tess Place (Omaha)

Nevada

- Bachi Burger (Las Vegas)
- Dish Cafe & Catering (Reno)
- Forte European Tapas Bar & Bistro (Las Vegas)
- Four Kegs Sports Pub (Las Vegas)
- Gold 'N Silver Inn (Reno)
- John Mull's Meats and Road Kill Grill (Las Vegas)
- Lola's - A Louisiana Kitchen (Las Vegas)
- Louis' Basque Corner (Reno)
- Naked City Pizza (Las Vegas)
- The Coffee Cup (Boulder City)
- UNLV (Las Vegas)
- Yayo Taco (Las Vegas)

New Hampshire

- Red Arrow Diner (Manchester)

New Jersey

- 10th Avenue Burrito (Belmar)
- Bay Way Diner (Linden)
- Brownstone Diner (Jersey City)
- George's Place (Cape May)
- Hightstown Diner (Hightstown)
- Jefferson Diner (Lake Hopatcong)
- La Isla Restaurant (Hoboken)
- Marie's Italian Specialities (Chatham)
- Maui's Dog House (Wildwood)
- Mustache Bill's (Barnegat Light)
- Quahog's Seafood Shack (Stone Harbor)
- Skylark Diner (Edison)
- The Ritz Diner (Livingston)
- Tick Tock Diner (Clifton)
- White Manna Hamburgers (Hackensack)

New Mexico

- Back Street Bistro (Santa Fe)
- Backroad Pizza (Santa Fe)
- Bert's Burger Bowl (Santa Fe)
- Bocado's (Albuquerque)
- Casa Chimayo (Santa Fe)
- Cecilia's Cafe (Albuquerque)
- Golden Crown Panaderia (Albuquerque)
- Harry's Roadhouse (Santa Fe)
- Jambo Cafe (Santa Fe)
- Monte Carlo Steak House (Albuquerque)
- Nexus Brewery (Albuquerque)
- Sophia's Place (Albuquerque)
- Standard Diner (Albuquerque)
- Tecolote Cafe (Santa Fe)
- The Cube BBQ (Albuquerque)
- Torino's @ Home (Albuquerque)
- Tune-Up Cafe (Santa Fe)
- Zia Diner & Angel Food Catering (Santa Fe)

New York

- Ben's Best Deli (Rego Park)
- Black Tree (New York)
- Blackthorn Restaurant and Pub (Buffalo)
- Brindle Room (New York)
- Bun-Ker Vietnamese (Ridgewood)
- Byblos Mediterranean Cafe (Syracuse)
- Defonte's Sandwich Shops (Brooklyn and New York City)
- Don Antonio by Starita (New York)
- Earl's Drive-In (Chaffee)
- Empire Brewing Company (Syracuse)
- Eva's European Sweets (Syracuse)
- Eveready Diner (Hyde Park)
- Funk 'N Waffles (Syracuse)
- Gazala's Place (New York)
- Grover's Bar & Grill (East Amherst)
- Hildebrandt's (Williston Park)
- Jimmy's Diner (Brooklyn)
- John's of 12th Street (New York)
- Kitty Hoynes (Syracuse)
- Lake Effect Diner (Buffalo)
- Mama's Food Shop (New York)
- MoGgridder's BBQ (Bronx)

- Mulberry Cafe (Lackawanna)
- Pastabilities (Syracuse)
- Pies 'N' Thighs (Brooklyn)
- Pizza Junction (North Tonawanda)
- Queens Comfort (Astoria)
- Rincon Criollo (Corona-Queens)
- Sage General Store (Long Island City)
- Sidecar (Brooklyn)
- Sophia Restaurant (Buffalo)
- The Pit Stop (Merrick)
- The Redhead (New York)
- The Smoke Joint (Brooklyn)
- The Sparrow Tavern (Astoria)
- Tortilleria Nixtamal (Corona)

North Carolina

- Bar-B-Q King Drive-In (Charlotte)
- Black Pelican (Kitty Hawk)
- Cabo Fish Taco (Charlotte)
- Coastal Cravings (Duck)
- Dish (Charlotte)
- Jake's Good Eats (Charlotte)
- Landmark Restaurant Diner (Charlotte)
- Ortegaz' Southwest Grill (Manteo)
- Outer Banks Brewing Station (Kill Devils Hill)
- South 21 Drive-In (Charlotte)
- The Black Pelican Oceanfront Restaurant (Kitty Hawk)
- The Brine and Bottle (Nags Head)
- The Penguin (Charlotte)
- The Weeping Radish (Grandy)
- Torgutas Lie Shellfish Bar & Grill (Nags Head)

Ohio

- Blue Ash Chili Restaurant (Cincinnati)
- Geraci's Restaurant (Cleveland)
- Lucky's Cafe (Cleveland)
- Melt Bar & Grilled (Lakewood)
- Momocho (Cleveland)
- Parkview Niteclub (Cleveland)
- Sterle's Slovenian Country House (Cleveland)
- Terry's Turf Club (Cincinnati)

Oklahoma

- Cattlemen's Steakhouse (Oklahoma City)
- Clanton's Cafe (Vinita)
- Eischen's Bar & Grill (Okarche)
- Ingrid's Kitchen (Oklahoma City)
- Leo's BBQ (Oklahoma City)
- Mama E's Wings & Waffles (Oklahoma City)
- Nic's Grill (Oklahoma City)
- The Diner (Norman)
- The Rock Cafe (Stroud)

Oregon

- Arleta Library Bakery & Cafe (Portland)
- Blueplate Lunch Counter & Soda Fountain (Portland)
- Bunk Sandwiches (Portland)
- Byways Cafe (Portland)
- Country Cat Dinnerhouse & Bar (Portland)
- Edelweiss Sausage & Delicatessen (Portland)
- Frank's Noodle House (Portland)
- Industrial Cafe & Saloon (Portland)
- Otto's Sausage Kitchen & Meat Market (Portland)
- PDX Six Seven One (Portland)
- Pine State Biscuits (Portland)
- Podnah's Pit Barbecue (Portland)
- Pok Pok (Portland)
- Shirley's Tippy Canoe (Troutdale)
- The Shed Garden Cafe (Portland)

Pennsylvania

- Big Jim's (Pittsburgh)
- Crystal Restaurant (Pittsburgh)
- Daddypops (Hatboro)
- Dor-Stop Restaurant (Pittsburgh)
- Geechee Girl Rice Café (Philadelphia)
- Good Dog Bar & Restaurant (Philadelphia)
- Honey's Sit-N-Eat (Philadelphia)
- Jamaican Jerk Hut (Philadelphia)
- Kelly O's Diner (Pittsburgh)
- Lo Bello's (Coraopolis)
- Memphis Taproom (Philadelphia)
- Nadine's Restaurant (Pittsburgh)
- Percy Street Bareque (Philadelphia)
- Pineville Tavern (Pineville)
- Sidecar Bar & Grille (Philadelphia)

- Silk City Diner (Philadelphia)
- South Philadelphia Taproom (Philadelphia)
- Standard Tap (Philadelphia)
- Starlite Lounge (Blawnox)
- The Dining Car & Market (Philadelphia)

Rhode Island

- Angelo's Civita Farnese (Providence)
- Anthony's Seafood (Middletown)
- Aunt Carrie's (Narragansett)
- Crazy Burger Cafe & Juice Bar (Narragansett)
- Edgewood Cafe (Cranston)
- Evelyn's Drive-In (Tiverton)
- Italian Corner (East Providence)
- Louie's Restaurant (Providence)
- Mediterraneo Caffè (Providence)
- The Liberty Elm Diner (Providence)

South Carolina

- Dixie Supply Bakery & Cafe (Charleston)
- Fuel Cantina (Charleston)
- Harold's (Gaffney)
- Pawleys Front Porch (Columbia)
- Perfectly Franks (Summerville)
- Tattooed Moose Restaurant (Charleston)
- The Beacon Drive-In (Spartanburg)
- The Early Bird Diner (Charleston)
- The Farmer's Shed (Lexington)
- The Glass Onion (Charleston)

Tennessee

- 55 South (Franklin)
- Alcenia's (Memphis)
- Arnold's Country Kitchen (Nashville)
- Athens Family Restaurant (Nashville)
- Bro's Cajun Cuisine (Nashville)
- Cafe Rakka (Hendersonville)
- Caffè Nonna (Nashville)
- Center Point BBQ (Hendersonville)
- Cozy Corner (Memphis)
- Grilled Cheeserie (Nashville)
- Jamaicaway (Nashville)
- Leonard's BBQ (Memphis)
- Little Tea Shop (Memphis)

- Marlowe's Ribs (Memphis)
- Martin's Bar-B-Que Joint (Nolensville)
- Mas Tacos Por Favor (Nashville)
- Phat Bites (Nashville)
- Pizza Palace (Knoxville)
- Rizzo's Diner (Memphis)
- Savarino's Cucina (Nashville)
- (SOB) South of Beale (Memphis)
- The Elegant Farmer (Memphis)
- Three Angles Diner (Memphis)
- Tom's Bar-B-Q (Memphis)
- Uncle Lou's (Memphis)

Texas

- Afrah (Richardson)
- Avila's (Dallas)
- Beto's Comida Latina (San Antonio)
- Bob's Taco Station (Rosenberg)
- Bun 'N' Barrel (San Antonio)
- Cafe Pita (Houston)
- Cane Rosso (Dallas)
- Casino El Camino (Austin)
- Chef Point Cafe (Watauga)
- Chop House Burgers (Arlington)
- Counter Cafe (Austin)
- Dough Pizzeria Napoletana (San Antonio)
- El Bohio (San Antonio)
- Foreign & Domestic (Austin)
- Fred's Texas Cafe (Fort Worth)
- Green Mesquite (Austin)
- Hullabaloo Diner (Wellborn)
- Jamaica Gates Caribbean Cuisine (Arlington)
- Kenny & Ziggy's (Houston)
- Lankford Grocery (Houston)
- Louie Mueller BBQ (Taylor)
- Louie's (Dallas)
- Luke's Inside Out (Austin)
- Mac & Ernie's (Tarpley)
- Magnolia Cafe (Austin)
- Magnolia Pancake Haus (San Antonio)
- Maple & Motor (Dallas)
- Maria's Taco Express (Austin)
- Monument Cafe (Georgetown)
- Moroccan Bites (San Antonio)

- Niko Niko's (Houston)
- Noble Pig Sandwiches (Austin)
- Monument Cafe (Georgetown)
- Pecan Lodge (Dallas)
- Pepe's and Mito's (Dallas)
- Prince Lebanese Grill (Arlington)
- Red Lion Pub & Restaurant (Houston)
- T-Bone Tom's Steakhouse (Kemah)
- Taco Taco Cafe (San Antonio)
- Taste of Europe (Arlington)
- Texas Pride BBQ (Adkins)
- The Cove (San Antonio)
- Tip Top Cafe (San Antonio)
- Twisted Root Burger Co. (Dallas)

Utah

- Blue Plate Diner (Salt Lake City)
- Burger Bar (Roy)
- Lone Star Taqueria (Salt Lake City)
- Moochie's Meatballs & More (Salt Lake City)
- Pat's BBQ (Salt Lake City)
- Red Iguana (Salt Lake City)
- Ruth's Diner (Salt Lake City)

Virginia

- Beach Pub (Virginia Beach)
- Captain Chuck-a-Mucks (Rescue)
- Citrus Breakfast & Lunch (Virginia Beach)
- Dots Back Inn (Richmond)
- Doumar's (Norfolk)
- Flip Flops Grill & Chill (Virginia Beach)
- Get Fresh Cafe (Norfolk)
- Harvey's Hot Dogs II (Portsmouth)
- La Caraquena (Falls Church)
- Leaping Lizards Cafe (Virginia Beach)
- Metro 29 Diner (Arlington)
- Moseberth's Fried Chicken (Portsmouth)
- Rigoletto Italian Bakery & Cafe (Virginia Beach)
- The Village Cafe (Richmond)
- Virginia Diner (Wakefield)
- Whitner's BBQ (Virginia Beach)

Washington

- Big Star Diner (Bainbridge Island)
- Bizzarro Italian Cafe (Seattle)
- Bobby's Hawaiian Style Restaurant (Everett)
- Bruno's European Restaurant (Tacoma)
- Chaps Coffee Co (Spokane)
- Crockett's Public House (Puyallup)
- Crown Bar (Tacoma)
- Darby's Cafe (Olympia)
- Dirty Oscar's Annex (Tacoma)
- Elk Public House (Spokane)
- Fish Tale Brew Pub (Olympia)
- Georgia's Greek Restaurant & Deli (Seattle)
- Hills' Restaurant and Lounge (Spokane)
- Mike's Chili Parlor (Seattle)
- Pam's Kitchen (Seattle)
- Picabu Neighborhood Bistro (Spokane)
- Slim's Last Chance Chili Shack & Watering Hole (Seattle)
- Southern Kitchen Restaurant (Tacoma)
- Voula's Offshore Cafe (Seattle)
- Waddell's Pub and Grille (Spokane)

West Virginia

- Central City Cafe (Huntington)
- Hillbilly Hot Dogs (Lesage)

Wisconsin

- Anchor Bar (Superior)
- Cempazuchi (Milwaukee)
- Comet Cafe (Milwaukee)
- Franks Diner (Kenosha)

SELECTIONS: FOOD & WINE

113.1 Overview

Food & Wine magazine regularly compiles various lists of top food and beverages as well as restaurants and bars throughout the U.S. The following are the most recent lists:

113.2 America's Best

Best Bars

- Bar Agricole (San Francisco, CA)
- Bar Crudo (Phoenix, AZ)
- Beretta (San Francisco, CA)
- Bestia (Los Angeles, CA)
- Boulevardier (Dallas, TX)
- Braise (Milwaukee, WI)
- Bub City (Chicago, IL)
- Clyde Common (Portland, OR)
- Distil (Milwaukee, WI)
- Eleven Madison Park (New York, NY)
- Forequarter (Madison, WI)
- Hendricks BBQ (St. Louis, MO)
- Jimmy's (Aspen, CO)
- Linger (Denver, CO)
- Lolinda (San Francisco, CA)
- Luc Luc (Portland, OR)
- Mayahuel (New York, NY)
- Oak at Fourteenth (Boulder, CO)
- Penca (Tucson, AZ)
- Port Fonda (Kansas City, MO)
- Raven & Rose (Portland, OR)
- Rich Table (San Francisco, CA)
- Rivera (Los Angeles, CA)
- Rolf & Daughters (Nashville, TN)
- Seven Lamps (Atlanta, GA)
- Sobou (New Orleans, LA)

- Southwark (Philadelphia, PA)
- St. Charles Exchange (Louisville, KY)
- The Slanted Door (San Francisco, CA)
- The Sound Table (Atlanta, GA)
- The Tasting Kitchen (Venice, CA)
- Windsor (Phoenix, AZ)
- Yusho (Chicago, IL)

Best Beer Bars

- Beer Revolution (Oakland, CA)
- Blind Tiger Ale House (New York, NY)
- Breukelen Bier Merchants (Brooklyn, NY)
- Bukowski Tavern (Boston, MA)
- Draught House (Austin, TX)
- Father's Office (Los Angeles, CA)
- Great Lost Bear (Portland, ME)
- Hopleaf (Chicago, IL)
- Monk's Kettle (San Francisco)
- Spuyten Duyvil (Brooklyn, NY)
- Standard Tap (Philadelphia, PA)
- The Bulldog (New Orleans, LA)
- The Mitten Bar (Ludington, MI)
- Über Tavern (Seattle, WA)
- Verdugo (Los Angeles, CA)

Best Beer Gardens

- Biergarten (San Francisco, CA)
- Birreria (New York, NY)
- Bohemianm Hall and Beer Garden (Queens, NY)
- Der Biergarten (Atlanta, GA)
- Drury Beer Garden (Philadelphia, PA)
- Easy Tiger (Austin, TX)
- Lowry Beer Garden (Denver, CO)
- Prost! (Portland, OR)
- Sheffield's (Chicago, IL)
- Stone Brewing World Bistro & Gardens (San Diego, CA)
- Sweet Cheeks Q (Boston, MA)
- The Red Lion Tavern (Los Angeles, CA)
- Village Pub & Beer Garden (Nashville, TN)
- Zeitgeist (San Francisco, CA)

Best Burgers/Bacon Burgers

- B Spot Burgers (Ohio, multiple locations)
- BLT Burger (Las Vegas, NV)

- Bobby's Burger Palace (various locations throughout Northeast U.S.)
- Chicago Cut Steakhouse (Chicago, IL)
- Craigie on Main (Boston, MA)
- David Burke Primehouse (Chicago, IL)
- Dyer's Burgers (Memphis, TN)
- Farm Burger (Decatur, GA)
- Father's Office (Los Angeles, CA)
- Gott's Roadside (Napa, CA)
- Green Street Grill (Boston, MA)
- Healdsburg Bar & Grill (Healdsburg, CA)
- Holeman & Finch (Atlanta, GA)
- In-N-Out Burger (California, multiple locations)
- Little Owl (New York, NY)
- Louis's Lunch (New Haven, CT)
- Lüke (New Orleans, LA)
- Michael's Genuine Food & Drink (Miami, FL)
- Miller's Bar (Dearborn, MI)
- Minetta Tavern (New York, NY)
- Palena Café (Washington, DC)
- Perini Ranch Steakhouse (Buffalo Gap, TX)
- Peter Luger (New York, NY)
- Shake Shack (New York, NY and Philadelphia, PA)
- Slows Bar BQ (Detroit, MI)
- Smoke (Dallas, TX)
- Ted's (Meriden, CT)
- The Spotted Pig (New York, NY)
- Umamicatessen (Los Angeles, CA)
- Wayfare Tavern (San Francisco, CA)
- White Manna (Hackensack, NJ)
- Zuni Café (San Francisco, CA)

Best Chicken Wings

- 17th Street BBQ (Murphysboro, IL and Las Vegas, NV)
- Alla Spina (Philadelphia, PA)
- Anchor Bar (Buffalo, NY)
- Belly Shack (Chicago, IL)
- Big Bob Gibson Bar-B-Q (AL and NC)
- BonChon (various U.S. locations)
- Clio (Boston, MA)
- Hopscotch (Oakland, CA)
- Lodge Restaurant at Carmel Valley Ranch (Carmel, CA)
- Lukshon by Sang Yoon (Culver City, CA)
- Mission Chinese Food (San Francisco, CA and New York, NY)
- NOLA Restaurant (New Orleans, LA)

- Pok Pok (Portland, OR and New York, NY)
- Prato (Winter Park, FL)
- San Tung (San Francisco, CA)
- Roast (Detroit, MI)
- Talde (Brooklyn, NY)
- The Bazaar by José Andrés (Los Angeles, CA)
- The Kettle Black (Brooklyn, NY)
- The Parish (Los Angeles, CA)
- The Source (Washington, DC)
- WingStop (Texas-based chain)
- Yusho (Chicago, IL)

Best Doughnuts

- Betty Ann Food Shop (Boston, MA)
- Britt's Donuts (Carolina Beach, NC)
- Café du Monde (New Orleans, LA)
- Clear Flour Bread Bakery (Brookline, MA)
- Congdon's Doughnuts (Wells, ME)
- Doughnut Plant (New York, NY)
- Dynamo Donuts (San Francisco, CA)
- Gourdough's (Austin, TX)
- Peter Pan Donut & Pastry Shop (Brooklyn, NY)
- Primo's Donuts (Los Angeles, CA)
- Sublime Doughnuts (Atlanta, GA)
- The Doughnut Shop (St. Louis, MO)
- The Doughnut Vault (Chicago, IL)
- Top Pot Doughnuts (Seattle, WA)
- Voodoo Doughnut (Portland, OR)

Best Fried Chicken

- Ad Hoc (Napa Valley, CA)
- Barbecue Inn (Houston, TX)
- Birch & Barley (Washington, DC)
- Blue Ribbon Sushi Bar & Grill (Las Vegas, NV)
- Bubba's Cooks Country (Dallas, TX)
- Central Michel Richard (Washington, DC)
- Crisp (Chicago, IL)
- Greenwood's (Roswell, GA)
- Harold's Chicken Shack (Chicago, IL)
- Hattie's (Saratoga Springs, NY)
- Husk (Charleston, SC)
- Jestine's (Charleston, SC)
- Jus Cookin's (Lakewood, CO)
- Mama Dip's Kitchen (Chapel Hill, NC)

- Mary Mac's Tea Room (Atlanta, GA)
- Momofuku Noodle Bar (New York, NY)
- Perry St. (New York, NY)
- Pies-N-Thighs (Brooklyn, NY)
- Pine State Biscuits (Portland, OR)
- Prince's Hot Chicken Shack (Nashville, TN)
- Roscoe's House of Chicken and Waffles (Los Angeles, CA)
- Simpatica (Portland, OR)
- Son of a Gun (Los Angeles, CA)
- Supper (Philadelphia, PA)
- The Highball (Austin, TX)
- Two Sisters Kitchen (Jackson, MS)
- Willie Mae's Scotch House (New Orleans, LA)

Best Grilled Cheese

- 24 Diner (Austin, TX)
- Artisanal Fromagerie, Bistro and Wine Bar (New York, NY)
- Beecher's Handmade Cheese (Seattle, WA and New York, NY)
- Blue Dog Bakery & Café (Louisville, KY)
- Big Sur Bakery (Big Sur, CA)
- Bouchon Bakery (New York, NY)
- Café Mezza (Houston, TX)
- Clementine (Los Angeles, CA)
- EastBurn (Portland, OR)
- Five Guys Burgers and Fries (multiple U.S. locations)
- Grahamwich (Chicago, IL)
- Grilled Cheese & Co. (Catonsville, MD)
- Jaleo (Washington, DC)
- Lola (Cleveland, OH)
- Milk Truck (New York, NY)
- Roxy's Grilled Cheese (Boston, MA)
- South Philadelphia Tap Room (Philadelphia, PA)
- Tartine Bakery (San Francisco, CA)
- The American Grilled Cheese Kitchen (San Francisco, CA)
- The Grilled Cheese Truck (Los Angeles, CA)
- The Queens Kickshaw (Queens, NY)

Best Ice Cream Shops

- Amy's Ice Cream (Austin, TX)
- Annabelle's Natural Ice Cream (Portsmouth, NY)
- Big Dipper Ice Cream (Missoula, MT)
- Bi-Rite Creamery (San Francisco, CA)
- Blue Marble (Brooklyn, NY)
- Bubbie's Ice Cream (Honolulu, HI)

- Cool Moon Ice Cream (Portland, OR)
- Crescent Ridge Dairy Bar (Sharon, MA)
- Four Seas Ice Cream (Centerville MA)
- Glacé Artisan Ice Cream (Kansas City, MO)
- Graeter's (Ohio, various locations)
- Ici Ice Cream (Berkley, CA)
- Jeni's Splendid Ice Creams (Columbus, OH)
- Maple View Farm and Dairy (Hillsborough, NC)
- Molly Moon Ice Cream (Seattle, WA)
- Moomers Homemade Ice Cream (Traverse City, MI)
- Mora Iced Creamery (Bainbridge Island, WA)
- Mt. Desert Ice Cream (Bar Harbor, ME)
- Pumphouse Creamery (Minneapolis, MN)
- Sweet Action Ice Cream (Denver, CO)
- Sweet Republic (Scottsdale, AZ)
- The Creole Creamery (New Orleans, LA)
- Three Twins Organic Ice Cream (San Rafael, CA)
- Toscanini's (Cambridge, MA)
- Woodside Farm Creamery (Hockessin, DE)

Best Juice Bars

- Beverly Hills Juice (Los Angeles, CA)
- BluePrintJuice (New York, NY)
- Drought (Detroit, MI)
- Dtox Juice (Atlanta, GA)
- Evolution Fresh (Bellevue, WA)
- Juice Land (Austin, TX)
- Juice Press (New York, NY)
- Juice to You (San Francisco, CA)
- jugofresh (Miami, FL)
- Kreation Juicery (Santa Monica, CA)
- Liquiteria (New York, NY)
- Melvin's Juice Box (New York, NY)
- Moon Juice (Venice, CA)
- Organic Avenue (New York, NY)
- Paleta (Los Angeles, CA and Detroit, MI)
- Peeled (Chicago, IL)
- Pressed Juicery (various locations, CA)
- Sip (Portland, OR)
- sweetpress (Washington, DC)
- The Gem (Dallas, TX)

Best Places For Pie

- Achatz Handmade Pie Co. (Ann Arbor, MI)

- First Prize Pies (Brooklyn, NY)
- Hill Country Chicken (New York, NY)
- HoneyPie (Milwaukee, WI)
- Hoosier Mama Pie Company (Chicago, IL)
- Mission Pie (San Francisco, CA)
- PieLab (Greensboro, AL)
- Random Order (Portland, OR)
- Scratch (Durham, NC)
- Simplethings Sandwich & Pie Shop (Los Angeles, CA)
- Sweetie Pies (Napa Valley, CA)
- Three Babes Bakeshop (San Francisco, CA)

Best Pizza Places

- 2Amys Neapolitan Pizzeria (Washington, DC)
- 800 Degrees (Los Angeles, CA)
- Al Forno (Providence, RI)
- Apizza Scholls (Portland, OR)
- Bar Toma (Chicago, IL)
- Buddy's Pizza (Detroit, MI)
- Burt's Place (Chicago, IL)
- Casey's Pizza Truck (San Francisco, CA)
- Co. (New York, NY)
- Del Popolo (San Francisco, CA)
- Di Fara (Brooklyn, NY)
- Don Antonio by Starita (New York, NY)
- Flour + Water (San Francisco, CA)
- Forcella (New York, NY)
- Frank Pepe Pizzeria Napoletana (New Haven, CT)
- Franny's (Brooklyn, NY)
- Garage Bar (Louisville, KY)
- Great Lake (Chicago, IL)
- Harry's Pizzeria (Miami, FL)
- Ken's Artisan Pizza (Portland, OR)
- Keste Pizza and Vino (New York, NY)
- Lucali (Brooklyn, NY)
- Mani Osteria (Ann Arbor, MI)
- Motorini (New York, NY)
- Nicoletta (New York, NY)
- Osteria (Philadelphia, PA)
- Oven and Shaker (Portland, OR)
- Pastaria (St. Louis, MO)
- Paulie Gee's (Brooklyn, NY)
- Pizzaiolo (Oakland, CA)
- Pizzeria Bianco (Phoenix, AZ)

- Pizzeria Delfina (San Francisco, CA)
- Pizzeria Lola (Minneapolis, MN)
- Pizzeria Mozza (Los Angeles, CA)
- Pizzeria Picco (Larkspur, CA)
- Punch Pizza (Saint Paul, MN)
- Redd Wood (Yountville, CA)
- Ribalta (New York, NY)
- Rubirosa (New York, NY)
- Santarpio's Pizza (Boston, MA)
- Sottocasa (New York, NY)
- Stella Rossa (Santa Monica, CA)
- Supino Pizzeria (Detroit, MI)
- Tacconelli's Pizzeria (Philadelphia, PA)
- Tarry Lodge (Port Chester, NY)
- Totonno's (Brooklyn, NY)
- The Backspace (Austin, TX)
- Via Tribunali (New York, NY)

Best Sandwich Shops

- Băco Mercat (Los Angeles, CA)
- Be'wiched (Minneapolis, MN)
- Bunk (Portland, OR)
- Butcher & Bee (Charleston, SC)
- Cochon Butcher (New Orleans, LA)
- Cutty's (Brookline, MA)
- Fozzie's Sandwich Emporium (St. Louis, MO)
- Fundamental (Los Angeles, CA)
- Ink.Sack (Los Angeles, CA)
- Neal's Deli (Carrboro, NC)
- No. 7 Sub (New York, NY)
- Pane Bianco (Phoenix, AZ)
- Parm (New York, NY)
- Revival Market (Houston, TX)
- Star Provisions (Atlanta, GA)
- Wise Sons (San Francisco, CA)
- Xoco (Chicago, IL)
- Zingerman's Roadhouse (Ann Arbor, MI)

Best Southern Food

- 5 & 10 (Athens, GA)
- Bar-B-Que Shop (Memphis, TN)
- Big Apple Inn (Jackson, MS)
- Burbage's Grocery (Charleston, SC)
- Charlie Teeple's Seafood (Thunderbolt, GA)

- Charlie Vergo's Rendezvous (Memphis, TN)
- Clary's Café (Savannah, GA)
- Cochon (New Orleans, LA)
- Cochon Butcher (New Orleans, LA)
- Cypress (Charleston, SC)
- Elizabeth on 37th (Savannah, GA)
- FIG (Charleston, SC)
- Herbsaint (New Orleans, LA)
- Holeman & Finch Public House (Atlanta, GA)
- Hot and Hot Fish Club (Birmingham, AL)
- Husk (Charleston, SC)
- Interstate Bar-B-Que (Memphis, TN)
- Mahony's Po-Boy Shop (New Orleans, LA)
- Marandy's Soul Food Restaurant (Savannah, GA)
- Martha Lou's Kitchen (Charleston, SC)
- McCrady's (Charleston, SC)
- Payne's Bar-B-Que (Memphis, TN)
- Restaurant August (New Orleans, LA)
- Restaurant Eugene (Atlanta, GA)
- Scott's Bar-B-Que (Hemingway, SC)
- The Barn at Blackberry Farm (Walland, TN)
- The Catbird Seat (Nashville, TN)
- Willie Mae's Scotch House (New Orleans, LA)
- Yardbird Southern Table & Kitchen (Miami, FL)

SELECTIONS: GAYOT

114.1 Overview

Since 1969, Gayot (pronounced guy-OH; www.gayot.com) has been a resource for news and professional reviews on dining, travel, and lifestyle.

Annually, Gayot publishes a list of the Top 40 restaurants in the U.S. and Top 10 lists for several restaurant segments. This chapter presents the 2013 selections.

114.2 Top 40 List 2013

- Addison (San Diego, CA)
- Alinea (Chicago, IL)
- Bacchanalia (Atlanta, GA)
- Bouley (New York, NY)
- Chef Mavro (Honolulu, HI)
- CityZen (Washington, DC)
- Coi (San Francisco, CA)
- Cotton (New York, NY)
- Daniel (New York, NY)
- Eleven Madison Park (New York, NY)
- Everest (Chicago, IL)
- Frasca Food & Wine (Boulder, CO)
- Gary Danko (San Francisco, CA)
- Georgia Room (Atlanta, GA)
- Jean Georges (New York, NY)
- Joël Robuchon (Las Vegas, NV)
- Le Bernardin (New York, NY)
- Le Cirque (New York, NY)
- Manresa (Los Gatos, CA)
- Masa (New York, NY)
- Mélisse (Los Angeles, CA)
- Menton (Boston, MA)
- Michael Mina (San Francisco, CA)
- per Se (New York, NY)
- Picasso (Las Vegas, NV)
- Providence (Los Angeles, CA)

- Restaurant August (New Orleans, LA)
- Restaurant Guy Savoy (Las Vegas, NV)
- Restaurant Nicholas (Red Bank, NJ)
- Spago Beverly Hills (Los Angeles, CA)
- Studio (Laguna Beach, CA)
- The French Laundry (Yountville, CA)
- The Herbfarm (Woodinville, WA)
- The Inn at Little Washington (Washington, VA)
- The Mansion Restaurant at Rosewood Mansion on Turtle Creek (Dallas, TX)
- The Modern (New York, NY)
- The Willows Inn (Seattle, WA)
- Urasawa (Los Angeles, CA)
- Vetri (Philadelphia, PA)
- Vie (Western Springs, IL)

114.3 Top 10 By Segment

Best Barbecue Restaurants

- City Market (Luling, TX)
- Daisy May's BBQ USA (New York, NY)
- Fiorella's Jack Stack Barbecue (Kansas City, MO)
- Full Moon Bar-B-Que (Hoover, AL)
- Heirloom Market BBQ (Atlanta, GA)
- Montgomery Inn at the Boathouse (Cincinnati, OH)
- Smoque BBQ (Chicago, IL)
- Urban Bar-B-Cue Company (Rockville, MD)
- Wexler's (San Francisco, CA)
- Zeke's Smokehouse (Montrose, CA)

Best Brunch

- Beauty & Essex (New York, NY)
- The Lounge (Philadelphia, PA)
- The Mansion Restaurant at Rosewood Mansion on Turtle Creek (Dallas, TX)
- Michael's Genuine Food & Drink (Miami, FL)
- Palisade (Seattle, WA)
- Prospect (San Francisco, CA)
- RAYA (Dana Point, CA)
- The Publican (Chicago, IL)
- The Restaurant at The Getty Center (Los Angeles, CA)
- Woodberry Kitchen (Baltimore, MD)

Best Burger Restaurants

- Burger Joint at Le Parker Meridien (New York, NY)
- Carl's Drive In (Brentwood, MO)
- Chip's Old Fashioned Hamburgers (Dallas, TX)
- DMK Burger Bar (Chicago, IL)
- FLIP burger boutique (Atlanta, GA)
- Gordon Ramsay BurGR (Las Vegas, NV)
- Le Tub (Hollywood, FL)
- Port of Call (New Orleans, LA)
- Short Order (Los Angeles, CA)
- Trueburger (Oakland, CA)

Best Cheap Eats

- All Star Sandwich Bar (Cambridge, MA)
- Big Star (Chicago, IL)
- Burger Tap & Shake (Washington, DC)
- Camellia Grill (New Orleans, LA)
- Chai Pani (Decatur, GA)
- Hash House A Go Go (Las Vegas, NV and San Diego, CA)
- Ken's Artisan Pizza (Portland, OR)
- Mission Chinese Food (San Francisco, CA)
- Pok Pok NY (Brooklyn, NY)
- Slater's 50/50 (Anaheim Hills, CA)

Best Heart-Healthy Restaurants

- Canyon Ranch Grill at The Palazzo Resort Hotel Casino (Las Vegas, NV)
- Claire's Corner Copia (New Haven, CT)
- Community Food & Juice (New York, NY)
- Founding Farmers (Washington, DC)
- Gather (Berkeley, CA)
- Green Zebra (Chicago, IL)
- Kyma (Atlanta, GA)
- Makoto (Bal Harbour, FL)
- Natural Selection (Portland, OR)
- True Foo Kitchen (Santa Monica, CA)

Best Hotel Brunch

- Edge Steak & Bar (Four Seasons Hotel Miami; Miami, FL)
- Grand Salon (The Queen Mary; Long Beach, CA)
- Henrietta's Table (The Charles Hotel; Cambridge, MA)
- Lake Terrace Dining Room (The Broadmoor; Colorado Springs, CO)
- Makana Terrace (The St. Regis Princeville Resort; Princeville, Kauai, HI)
- Rib Room (Omni Royal Orleans; New Orleans, LA)
- Six Seven (The Edgewater; Seattle, WA)

- The Mansion Restaurant at Rosewood Mansion on Turtle Creek (Dallas, TX)
- The Jefferson (The Jefferson; Richmond, VA)
- Top of the Mark (InterContinental Mark Hopkins; San Francisco, CA)

Best Hotel Restaurants

- Cafe Boulod (The Surrey; New York, NY)
- Georgian Room (The Cloister; Sea Island, GA)
- L'Espalier (Mandarin Oriental Boston; Boston, MA)
- Montage Laguna Beach (Studio; Laguna Beach, CA)
- Picasso (Bellagio; Las Vegas, NV)
- The Bar at Blackberry Farm (Blackberry Farm; Walland, TN)
- The Inn at Little Washington (Washington, VA)
- The Mansion Restaurant at Rosewood Mansion on Turtle Creek (Dallas, TX)
- The Restaurant at Meadowood (Meadowood Napa Valley; St Helena, CA)
- The Willows Inn (Lummi Island, WA)

Best Ice Cream Shops

- Bassetts Ice Cream (Philadelphia, PA)
- Black Dog Gelato (Chicago, IL)
- Fairfax Scoop (Fairfax, CA)
- Four Seas Ice Cream (Centerville, MA)
- Graeter's (Cincinnati, OH)
- Humphry Slocombe (San Francisco, CA)
- Il Laboratorio del Gelato (New York, NY)
- Mora Iced Creamery (Bainbridge Island, WA)
- Morelli's Gourmet Ice Cream & Desserts (Atlanta, GA)
- Sprinkles Ice Cream (Beverly Hills, CA)
- Wild About Harry's (Dallas, TX)

Best Outdoor Dining Restaurants

- Birreria (New York, NY)
- Brix (Napa, CA)
- Comme Ca at The Cosmopolitan (Las Vegas, NV)
- Fontana (Coral Gables, FL)
- Foreign Cinema (San Francisco, CA)
- Nobu Malibu (Malibu, CA)
- Piccolo Sogno (Chicago, IL)
- Ray's on the River (Atlanta, GA)
- Talula's Garden (Philadelphia, PA)
- The Beachcomber at Crystal Cove (Newport Coast, CA)

Best Pizza Restaurants

- 2Amys (Washington, DC)
- Antico Pizza Napoletana (Atlanta, GA)

- Coalfire (Chicago, IL)
- Dolce Vita Pizzeria & Enoteca (Houston, TX)
- Keste Pizza & Vino (New York, NY)
- Pizzeria Bianco (Phoenix, AZ)
- Regina Pizzeria (Boston, MA)
- Serious Pie (Seattle, WA)
- Stella Rossa Pizza Bar (Santa Monica, CA)
- Tony's Pizza Napoletana (San Francisco, CA)

Best Seafood Restaurants

- Blueacre Seafood (Seattle, WA)
- Fish Story (Napa, CA)
- G W Fins (New Orleans, LA)
- L2O at The Belden-Stratford (Chicago, IL)
- Le Bernardin (New York, NY)
- Maritana Grille (St. Pete Beach, FL)
- Michael Mina (Las Vegas, NV)
- Providence (Los Angeles, CA)
- REEF (Houston, TX)
- Splash Restaurant & Bar (Westport, CT)

Best Steakhouses

- Alexander's Steakhouse (Cupertino, CA)
- Bavette's Bar & Boeuf (Chicago, IL)
- Bern's Steak House (Tampa, FL)
- CUT (Beverly Hills, CA)
- Grill 225 (Charleston, SC)
- Gordon Ramsay Steak (Las Vegas, NV)
- Kayne Prime (Nashville, TN)
- Killen's Steakhouse (Pearland, TX)
- ROAST (Detroit, MI)
- Quality Meats (New York, NY)

Best Wine Bars

- Bar Boulud (New York, NY)
- Bounty Hunger Wine Bar & Smokin' BBQ (Napa, CA)
- D.O.C.G. at The Cosmopolitan (Las Vegas, NV)
- Noble Rot (Portland, OR)
- OC Wine Mart & Tasting Bar (Irvine, CA)
- Patrick's Bar Vin at Hotel Mazarin (New Orleans, LA)
- Pops for Champagne (Chicago, IL)
- Proof (Washington, DC)
- Veritas Wine Room (Dallas, TX)
- Vino Venue (Dunwoody, GA)

Most Romantic Restaurants

- Biga on the Banks (San Antonio, TX)
- Hoku's (Honolulu, HI)
- L2O (Chicago, IL)
- Peninsula Grill (Charleston, SC)
- Sierra Mar (Big Sur, CA)
- The Barn at Blackberry Farm (Walland, TN)
- The White Barn Inn Restaurant (Kennebunk, ME)
- Thomas Henkelmann (Greenwich, CT)
- Top of the World (Las Vegas, NV)
- Wolfgang Puck at Hotel Bel-Air (Los Angeles, CA)

SELECTIONS: THE DAILY MEAL

115.1 Overview

The Daily Meal (www.thedaily meal.com), an online resource by Spanfeller Media Group, publishes annual lists of the top restaurants and food trucks in the United States.

Restaurants and food trucks considered for selection are nominated by a panel of judges comprised primarily of restaurant critics, food and lifestyle writers, and staff editors. The panel votes based on cuisine, formality of food and atmosphere, level of “buzz,” and other considerations.

115.2 Top Selections 2013

Top 101 Restaurants

1. Le Bernardin (New York, NY)
2. Eleven Madison Park (New York, NY)
3. French Laundry (Yountville, CA)
4. Per Se (New York, NY)
5. Chez Panisse (Berkeley, CA)
6. Alinea (Chicago, IL)
7. Daniel (New York, NY)
8. Animal (Los Angeles, CA)
9. Momofuku Ssäm (New York, NY)
10. Blue Hill Stone Barns (Pocantico Hills, NY)
11. Commander’s Palace (New Orleans, LA)
12. Husk (Charleston, SC)
13. Blackbird (Chicago, IL)
14. Le Pigeon (Portland, OR)
15. Galatoire’s (New Orleans, LA)
16. Gramercy Tavern (New York, NY)
17. Jean Georges (New York, NY)
18. State Bird Provisions (San Francisco, LA)
19. Bazaar (Los Angeles)
20. Girl & the Goat (Chicago, IL)
21. The Publican (Chicago, IL)
22. Cochon (New Orleans, LA)

23. Zuni Cafe (San Francisco, CA)
24. Inn at Little Washington (Washington, VA)
25. Next (Chicago, IL)
26. ABC Kitchen (New York, NY)
27. August (New Orleans, LA)
28. Bern's Steak House (Tampa, FL)
29. Del Posto (New York, NY)
30. Joël Robouchon (Las Vegas, NV)
31. Gotham Bar & Grill (New York, NY)
32. Bar Tartine (San Francisco, CA)
33. Bouchon Bistro (Yountville, CA)
34. Babbo (New York, NY)
35. Osteria Mozza (Los Angeles, CA)
36. O-Ya (Boston, MA)
37. Pok Pok (Portland, OR)
38. Manresa (Los Gatos, CA)
39. FIG (Charleston, SC)
40. Frasca Food & Wine (Boulder, CO)
41. Bouchon Bistro (Las Vegas, NV)
42. Fore Street (Portland, OR)
43. Lucques (Los Angeles, CA)
44. Michael Mina (San Francisco, CA)
45. Blue Hill (New York, NY)
46. NoMad (New York, NY)
47. Il Buco Alimentari (New York, NY)
48. Coi (San Francisco, CA)
49. Uchi (Austin, TX)
50. Canlis (Seattle, WA)
51. Gary Danko (San Francisco, CA)
52. Marea (New York, NY)
53. Ippudo (New York, NY)
54. Topolobampo (Chicago, IL)
55. Joe's Stone Crab (Miami, FL)
56. Quince (San Francisco)
57. Guy Savoy (Los Angeles, CA)
58. minibar (Washington, DC)
59. wd~50 (New York, NY)
60. Momofuku Ko (New York, NY)
61. Mission Chinese (San Francisco, CA)
62. Hominy Grill (Charleston, SC)
63. Beast (Portland, OR)
64. Vetri (Philadelphia, PA)
65. Catbird Seat (Nashville, TN)
66. Masa (New York, NY)

67. Sushi Yasuda (New York, NY)
68. Fearing's (Dallas, TX)
69. Zahav (Philadelphia, PA)
70. CityZen (Washington, DC)
71. Al Di La (Brooklyn, NY)
72. Herbsaint (New Orleans, LA)
73. Hinoki & The Bird (Los Angeles, CA)
74. Michael's Genuine (Miami, FL)
75. Spago (Los Angeles, CA)
76. Chef's Table at Brooklyn Fare (Brooklyn, NY)
77. Baco Mercat (Los Angeles, CA)
78. é by José Andrés (Las Vegas, NV)
79. City Grocery (Oxford, MS)
80. McCrady's (Charleston, SC)
81. Nobu (New York, NY)
82. Providence (Los Angeles, CA)
83. Komi (Washington, DC)
84. Cut (Los Angeles, CA)
85. Yank Sing (San Francisco, CA)
86. The Walrus and the Carpenter (Seattle, WA)
87. Bacchanalia (Atlanta, GA)
88. Hugo's Regional Mexican Cuisine (Houston, TX)
89. Lotus of Siam (Las Vegas, NV))
90. Roy's of Waikiki (Honolulu, HI)
91. The Restaurant at Meadowood (St. Helena, CA)
92. Underbelly (Houston, TX)
93. Alder (New York, NY)
94. Sushi Nakazawa (New York, NY)
95. Night + Market (Los Angeles, CA)
96. Rasika (Washington, DC)
97. Zaytinya (Washington, DC)
98. The Elm (Brooklyn, NY)
99. Betony (New York, NY)
100. The Barn at Blackberry Farm (Walland, TN)
101. Spiaggia (Chicago, IL)

Top 101 Food Trucks

1. Red Hook Lobster Truck (New York, NY)
2. Kogi BBQ (Los Angeles, CA)
3. Fojol Brothers (Washington, DC)
4. Big gay Ice Cream Truck (New York, NY)
5. The Lime Truck (Orange County, CA)
6. East Side King (Austin, TX)

7. Rickshaw Stop (San Antonio, TX)
8. The Cinnamon Snail (New York, NY)
9. Where Ya At Matt (Seattle, WA)
10. Chef Shack (Minneapolis, MN)
11. Schnitzel & Things (New York, NY)
12. The Buttermilk Truck (Los Angeles, CA)
13. Wafels & Dinges (New York, NY)
14. Grill 'Em All (Los Angeles, CA)
15. Roxy's Gourmet Grilled Cheese (Boston, MA)
16. Marination Mobile (Seattle, WA)
17. Guerrilla Street Food (St. Louis, MO)
18. Bernie's Burger Bus (Houston, TX)
19. The Grilled Cheeserie (Nashville, TN)
20. Roli Roti Gourmet Rotisserie (San Francisco, CA)
21. Slidin' Thru (Las Vegas, NV)
22. The Grilled Cheese Truck (Los Angeles, CA)
23. Country Boys/Martinez Tacos (New York, NY)
24. KOi Fusion (Portland, OR)
25. Fivetenburger (Oakland, CA)
26. Fukuburger (Las Angeles, NV)
27. Korilla BBQ (New York, NY)
28. Only Burger (Durham, NC)
29. Sam's ChowderMobile (San Francisco, CA)
30. Mas Tacos Por Favor (Nashville, TN)
31. Chairman Bao Bun Truck (San Francisco, CA)
32. Basil Thyme (Washington, DC)
33. GourMelt (Reno, NV)
34. The Peached Tortilla (Austin, TX)
35. The Eatsie Boys (Houston, TX)
36. Oh My Gogi! (Houston, TX)
37. El Camión (Seattle, WA)
38. Vizzi Truck (Los Angeles, CA)
39. Border Grill (Los Angeles, CA)
40. Seoul Sausage (Los Angeles, CA)
41. 5411 Empanadas (Chicago, IL)
42. Seabirds (Orange County, CA)
43. Maximus/Minimus (Seattle, WA)
44. Food Shark (Marfa, TX)
45. Pepe Food Truck (Washington, DC)
46. Crepes Bonaparte (Anaheim, CA)
47. Jefe's Original Fish Taco & Burgers (Miami, FL)
48. Ms. Cheezious Fresh Made Grilled Cheese (Miami, FL)
49. Sky's Gourmet Tacos (Los Angeles, CA)
50. Clover Food Truck (Boston, MA)

51. Nom Nom Truck (San Francisco, CA)
52. LudoTruck (Los Angeles, CA)
53. Hapa SF (San Francisco, CA)
54. KoJa Kitchen (San Francisco, CA)
55. Dusty Buns (Fresno, CA)
56. Lobsta Truck (Los Angeles, CA)
57. Riffs Fine Street Food (Nashville, TN)
58. Spencer on the Go (San Francisco, CA)
59. Dim Ssäm à gogo by Sakaya Kitchen (Miami, FL)
60. Seoul Taco (St. Louis, MO)
61. Jogasaki Sushi Burrito Truck (Los Angeles, CA)
62. Liba Falafel Truck (San Francisco, CA)
63. Baby's Badass Burgers (Los Angeles, CA)
64. Taim Mobile (New York, NY)
65. Slap Yo Mama (Los Angeles, CA)
66. Red Hook Lobster Pound (Washington, DC)
67. Scratch Truck (Indianapolis, IN)
68. Latin Burger and Taco (Miami, FL)
69. Le Truc (San Francisco, CA)
70. Senor Sisig (San Francisco, CA)
71. Komodo Truck (Los Angeles, CA)
72. DC Slices (Washington, DC)
73. Indiana Jones Chow Truck (Santa Monica, CA)
74. Devilicious (San Diego, CA)
75. JapaCurry (San Francisco, CA)
76. Streetza (Milwaukee, WI)
77. Geechee Island (Charleston, SC)
78. Rito Loco (Washington, DC)
79. Easy Slider (Dallas, TX)
80. Cha Cha Chow (St. Louis, MO)
81. Lucky Old Souls (Philadelphia, PA)
82. Souvlaki GR (New York, NY)
83. Quiero Arepas (Denver, CO)
84. Vellee Deli (Twin Cities, MN)
85. Roti Rolls (Charleston, SC)
86. Bruno's GastroTruck (Smith Mountain Lake, VA)
87. Hodge Podge (Cleveland, OH)
88. The People's Pig (Portland, OR)
89. Hey you Gon Eat or What (Austin, TX)
90. Fist of Fusion (Los Angeles, CA)
91. Coreanos (Houston, TX)
92. Luke's Lobster (New York, NY)
93. The Southern Mac & Cheese Truck (Chicago, IL)
94. La Cocinita (New Orleans, LA)

95. Rip Whip (San Francisco, CA)
96. The Flying Stove (Wichita, KS)
97. Pizza Buds (Nashville, TN)
98. Go Gyro Go (St. Louis, MO)
99. Manna From Heaven (Denver, CO)
100. Coast 2 Coast (Las Vegas, NV)
101. Brown Bag Lunch Truck (Chicago, IL)

115.3 Market Resources

The Daily Meal, 156 5th Avenue, Suite 400, New York, NY 10010.
(www.thedailymeal.com)

SELECTIONS: TRAVEL + LEISURE

116.1 Overview

Travel + Leisure magazine regularly compiles various lists of top restaurants throughout the U.S. The following are the most recent lists:

116.2 Restaurant and Beverage Service Selections

Best BYO Restaurants

- Bennachin (New Orleans, LA)
- Bonsoirée (Chicago, IL)
- Cafe Rossetti's (Winthrop, MA)
- D-Street Noshery (Portland, OR)
- Five Islands Lobster (Georgetown, ME)
- G'Raj Mahal Café (Austin, TX)
- Iggies (Baltimore, MD)
- Kaz An Nou (New York, NY)
- Lolita (Philadelphia, PA)
- Russian Dacha Café (Los Angeles, CA)
- Thai X-ing (Washington, DC)
- White Tiger Gourmet (Athens, GA)

Best Chinese Restaurants

- A Single Pebble (Burlington, VT)
- Bo Ling's (Kansas City, MO)
- Chiang's Gourmet (Seattle, WA)
- Chou's Kitchen (Chandler, AZ)
- Chung King (Los Angeles, CA)
- Gourmet Dumpling House (Boston, MA)
- Han Dynasty (Philadelphia, PA)
- Hunan Taste (Catonsville, MD)
- Koi Palace (Daly City, CA)
- Lao Sze Chuan (Chicago, IL)
- Little Village Noodle House (Honolulu, HI)
- Mandarin (Salt Lake City, UT)
- Mission Chinese Food (New York, NY and San Francisco, CA)

- Peter Chang Café (Richmond, VA)
- Ping Pong Pong (Las Vegas, NV)
- San Tung Restaurant (San Francisco, CA)
- Sea Harbour Restaurant (Rosemead, CA)
- Shandong (Portland, OR)
- Shanghai Restaurant (Houston, TX)
- Spicy & Tasty (New York, NY)
- Taipei Gourmet (Lexington, MA)
- The Source (Washington, DC)
- Xi'an Famous Foods (New York, NY)
- Yangming Restaurant (Bryn Mawr, PA)

Best Cocktail Bars

- Anvil Bar (Houston, TX)
- Cure (New Orleans, LA)
- Drink (Boston, MA)
- Green Russell (Denver, CO)
- Smuggler's Cove (San Francisco, CA)
- Teardrop Lounge (Portland, OR)
- The Clover Club (Brooklyn, NY)
- The Passenger (Washington, DC)
- The Violet Hour (Chicago, IL)
- Zig Zag Café (Seattle, WA)

Best Comfort Foods

- Absolute Bagels (New York, NY)
Menu item: Bagels
- Angelini Osteria (Los Angeles, CA)
Menu item: Lasagna
- Big Bob Gibson Bar-B-Q (Decatur, AL)
Menu item: Barbecued Chicken
- Burt's Place (Chicago, IL)
Menu item: Deep-Dish Pizza
- Dolphin Marina & Restaurant (South Harpswell, ME)
Menu item: Chowder
- Doughnut Plant (New York, NY)
Menu item: Doughnuts
- Famous 4th Street Delicatessen (Philadelphia, PA)
Menu item: Chicken Soup
- Girl & the Goat (Chicago, IL)
Menu item: French Fries
- Highlands Bar & Grill (Birmingham, AL)
Menu item: Baked Grits
- Jacques Torres (various locations, NY and NJ)

- Menu item: Chocolate Chip Cookies
- Johnsons Corner (Loveland, CO)
Menu item: Cinnamon Roll
- Loveless Café (Nashville, TN)
Menu item: Biscuits and Gravy
- Meatball Shop (New York, NY)
Menu item: Meatballs
- Melt Bar and Grilled (Lakewood, OH)
Menu item: Grilled Cheese
- Moonlite Bar-B-Q Inn (Owensboro, KY)
Menu item: Ribs
- Prince's Hot Chicken Shack (Nashville, TN)
Menu item: Friend Chicken
- Quinn's Pub (Seattle, WA)
Menu item: Burger
- Salt Grass Steak House (Houston, TX)
Menu item: Chicken-Fried Steak
- Sam Choy's Breakfast, Lunch & Crab (Honolulu, HI)
Menu item: Loco Moco
- Sarcone's Deli (Philadelphia, PA)
Menu item: Hoagie
- Slim's Last Chance (Seattle, WA)
Menu item: Chili
- Slow Bar B Q (Detroit, MI)
Menu item: Mac 'n Cheese
- Stanley's Kitchen and Tap (Chicago, IL)
Menu item: Mashed Potatoes
- Susiecakes (Los Angeles, CA)
Menu item: Cupcakes
- The Aroma Pie Shop (Whalan, MN)
Menu item: Pie
- The Blacksmith (Bend, OR)
Menu item: Meatloaf
- The Little Nell (Aspen, CO)
Menu item: Hot Chocolate
- The Original Pancake House (Portland, OR)
Menu item: Pancakes
- The Red Hot (Tacoma, WA)
Menu item: Hot Dog
- Wong (New York, NY)
Menu item: Ice Cream

Best Donuts

- Bob's Donut & Pastry Shop (San Francisco, CA)
- Bomboloni (New York, NY)
- Bouchon Bakery (Yountville, CA)
- Café Du Monde (New Orleans, LA)
- Coffee An' Donut Shop (Westport, CT)
- Doughnut Plant (New York, NY)
- Dynamo Donut and Coffee (San Francisco, CA)
- Fractured Prune (Ocean City, MD)
- Frosty's Donut & Coffee Shop (Brunswick, ME)
- Kane's Donuts (Saugus, MA)
- Mighty-O Donuts (Seattle, WA)
- Nicola's Donuts (Tampa, FL)
- Old Fashioned Donuts (Chicago, IL)
- Peter Pan Bakery (Brooklyn, NY)
- Randy's Donuts (Los Angeles)
- Round Rock Donuts (Round Rock, TX)
- Spudnut Shop (Richland, WA)
- Stan's Doughnuts (Westwood Village, CA)
- Sublime Doughnuts (Atlanta, GA)
- Top Pot Doughnuts (Seattle, WA)
- Voodoo Doughnut (Portland, OR)
- Walton Donuts (Denver, CO)

Best Fried Chicken

- Barbecue Inn (Houston, TX)
- Blue Ribbon Sushi Bar and Grill (New York, NY)
- Crisp (Chicago, IL)
- Hollyhock Hill (Indianapolis, IN)
- Max's Wine Dive (Austin, TX)
- Prince's Hot Chicken Shack (Nashville, TN)
- Rack & Soul (New York, NY)
- Restaurant Eugene (Atlanta, GA)
- Roscoe's House of Chicken and Waffles (Los Angeles, CA)
- Side Street Inn (Honolulu, HI)
- Spring Hill (Seattle, WA)

Best French Fries

- Al's French Fry (Burlington, VT)
- Amsterdam Bar & Hall (Saint Paul, MN)
- Blue Duck Tavern (Washington, DC)
- Boise Fry Company (various locations, Idaho)
- Bourbon Steak (Miami, FL)
- Chego (Los Angeles, CA)

- Coreanos (Austin, TX)
- Duckfat (Portland, ME)
- Flip Burger Boutique (Atlanta, GA)
- Gilroy Garlic Fries at AT&T Park (San Francisco, CA)
- Green Pig Bistro (Arlington, VA)
- Hot Doug's (Chicago, IL)
- Hubcap Grill (Houston, TX)
- Jasper's Corner Tap (San Francisco, CA)
- Jonesy's EatBar (Denver, CO)
- La Boca (New Orleans, LA)
- Pike Street Fish Fry (Seattle, WA)
- Pomme Frites (New York, NY)
- Saus (Boston, MA)
- Thrasher's (Ocean City, MD)
- The Breslin Bar & Dining Room (New York, NY)
- The Green Room (Greenville, SC)
- The Original Hot Dog Shop (Pittsburgh, PA)
- Violetta (Portland, OR)

Best Italian Restaurants

- Acquerello (San Francisco, CA)
- Al Forno (Providence, RI)
- Assaggio (Seattle, WA)
- Bar La Grassa (Minneapolis, MN)
- Bartolotta (Las Vegas, NV)
- Caffé Mingo (Portland, OR)
- Da Marco (Houston, TX)
- Del Posto (New York, NY)
- Domenica (New Orleans, LA)
- Flour + Water (San Francisco, CA)
- Frank Pepe Pizzeria Napoletana (New Haven, CT)
- Frasca (Boulder, CO)
- Harry's Pizzeria (Miami, FL)
- Jasper's (Kansas City, MO)
- L'Amante (Burlington, VT)
- Mani Osteria (Ann Arbor, MI)
- Marea (New York, NY)
- Obelisk (Washington, DC)
- Osteria Mozza/Pizzeria Mozza (Los Angeles, CA)
- Palena Café (Washington, DC)
- Pizzeria Bianco (Phoenix, AZ)
- Roberta's (Brooklyn, NY)
- Spiaggia (Chicago, IL)
- Terramia Ristorante (Boston, MA)

- The Backspace (Austin TX)
- Tony's (St. Louis, MO)
- Trattoria Lucca (Charleston, SC)
- Tulio (Seattle, WA)
- Valentino (Santa Monica, CA)
- Vetri (Philadelphia, PA)

Best Pancakes

- Hawaiian Style Café (Big Island, HI)
- Hominy Grill (Charleston, SC)
- Lake Placid Lodge (Lake Placid, NY)
- Lula (Chicago, IL)
- Prune (New York, NY)
- Stanley (New Orleans, LA)
- The Downyflake (Nantucket, MA)
- The Farmers Diner (Quechee, VT)
- The Griddle Café (West Hollywood, CA)
- The Original Pancake House (Portland, OR)

Best Places To Drink Tea

- Harney & Sons (New York, NY)
- Ku Cha House of Tea (Boulder, CO)
- Park Hyatt (Washington, DC)
- Samovar Tea Lounge (San Francisco, CA)
- Seven Cups (Tucson, AZ)
- Steven Smith Teamaker (Portland, OR)

Best Seafood Restaurants

- Anchor & Hope (San Francisco, CA)
- Cantler's Riverside Inn (Annapolis, MD)
- Casamento's (New Orleans, LA)
- Coastal Cold Storage (Petersburg, AK)
- Dave's Carry-Out (Charleston, SC)
- DC Coast (Washington, DC)
- Dock's Oyster House (Atlantic City, NJ)
- Garcia's Seafood Grille & Fish Market (Miami, FL)
- GT Fish & Oyster (Chicago, IL)
- Hogfish Bar & Grill (Stock Island, FL)
- Jake's Famous Crawfish (Portland, OR)
- Jax Fish House & Oyster Bar (Denver, CO)
- Le Bernardin (New York, NY)
- Little Fish BYOB (Philadelphia, PA)
- Maison Premiere (Brooklyn, NY)
- Mama's Fish House (Maui, HI)

- Marshall Store (Tomales Bay, CA)
- Neptune Oyster (Boston, MA)
- Red Fish Grill (New Orleans, LA)
- Reef (Houston, TX)
- RM Seafood (Las Vegas, NV)
- Sea Change (Minneapolis, MN)
- Shaw's Fish and Lobster (New Harbor, ME)
- Son of a Gun (Los Angeles, CA)
- Star Fish Company (Cortez, FL)
- Straight Wharf Restaurant (Nantucket, MA)
- The Clam Shack (Kennebunkport, ME)
- The Optimist (Atlanta, GA)
- The Walrus and the Carpenter (Seattle, WA)
- Uchi + Uchiko (Austin, TX)
- Water Grill (Los Angeles, CA)

Best Wine Bars

- 20 Brix (Cincinnati, OH)
- Bacchanal (New Orleans, LA)
- Bar Covell (Los Angeles, CA)
- Barcelona (Atlanta, GA)
- Bin No. 18 (Miami, FL)
- Caveau Wine Bar (Denver, CO)
- D.O.C. Wine Bar (Chicago, IL)
- Domacin (Stillwater, MN)
- Flight Wine Bar (Rochester, NY)
- Grotto Wine Bar (Cleveland, OH)
- Kazimierz World Wine Bar (Scottsdale, AZ)
- Kir (Portland, OR)
- Lelabar (New York, NY)
- Max's Wine Dive (Austin, TX)
- Poco Wine Room (Seattle, WA)
- Sonoma Wine Bar (Houston, TX)
- The Ten Bells (New York, NY)
- The Butcher Shop (Boston, MA)
- The Hidden Vine (San Francisco, CA)
- Tinto (Philadelphia, PA)
- Veritas (Washington, DC)
- Veritas Wine Room (Dallas, TX)
- Vino Italia Tapas (Honolulu, HI)
- West End Wine Bar (Chapel Hill, NC)
- Zin Wine Bar (Healdsburg, CA)

Coollest Coffeehouses

- Arabica Coffee Company (Portland, ME)
- Beach Bum Café (Honolulu, HI)
- Blue Bottle Coffee (San Francisco, CA)
- Busboys and Poets (Washington, DC)
- Café Demetrio (Miami, FL)
- Café du Monde (New Orleans, LA)
- Coava (Portland, OR)
- Coffee Slingers (Oklahoma City, OK)
- Comet Coffee (Ann Arbor, MI)
- Espresso Vivace Roasteria (Seattle, WA)
- Four Barrel (San Francisco, CA)
- Intelligentsia Coffee & Tea (Chicago, IL)
- Kopplin's Coffee (Saint Paul, MN)
- Lamill Coffee Boutique (Los Angeles, CA)
- Octane Coffee House & Lounge (Atlanta, GA)
- One Shot Coffee (Philadelphia, PA)
- Otherlands Coffee Bar (Memphis, TN)
- PJ's Coffee (New Orleans, LA)
- Pavement Coffee House (Boston, MA)
- Progress Coffee (Austin, TX)
- RBC (New York, NY)
- Spro (Baltimore, MD)
- Stumptown (Portland, OR)
- The Roasterie Café (Kansas City, MO)
- The Roasting Plant (New York, NY)

SELECTIONS: ZAGAT

117.1 Best Burgers

Zagat Survey (www.zagat.com) selected the following as the best restaurants for a burger:

Atlanta, GA

- The Vortex

Austin, TX

- Hopdoddy Burger Bar

Baltimore, MD

- Linwoods (Owings Mills)

Boston, MA

- Mr. Bartley's

Chicago, IL

- Kuma's Corner

Dallas/Fort Worth, TX

- Maple & Motor

Denver, CO

- Crave Real Burgers (Castle Rock)

Fort Lauderdale, FL

- Le Tub Saloon (Hollywood)

Houston, TX

- Hubcap Grill

Las Vegas, NV

- LBS: A Burger Joint

Los Angeles, CA

- Golden State

Miami, FL

- LoKal Burgers

New Orleans

- Company Burger

New York, NY

- Burger Joint

Philadelphia, PA

- Sketch

Portland, OR

- Killer Burger

San Diego, CA

- Hodad's Burgers

San Francisco, CA

- 900 Grayson (Berkley)

Seattle, WA

- Broiler Bay (Bellevue)

117.2 Best Business Lunch

Zagat Survey selected the following as the best restaurants in major cities for a power lunch:

Atlanta, GA

- Bones

Austin, TX

- Trio

Boston, MA

- Menton

Chicago, IL

- Topolobampo

Dallas, TX

- The Mansion Restaurant at Rosewood Mansion on Turtle Creek

Houston, TX

- Mark's American Cuisine

Las Vegas, NV

- Capital Grille

Los Angeles, CA

- Providence

Miami, FL

- Joe's Stone Crab

Minneapolis, MN

- Manny's Steakhouse

New Orleans, LA

- Commander's Palace

New York, NY

- The Four Seasons

Philadelphia, PA

- Capital Grille

Phoenix, AZ

- Durant's

San Diego, CA

- WineSellar & Brasserie

San Francisco, CA

- Boulevard

Seattle, WA

- The Metropolitan Grill

St. Louis, MO

- Anthony's

Washington, DC

- Central Michel Richard

117.3 Best Mexican Food

Zagat Survey selected the following as the best restaurants for Mexican food:

Atlanta, GA

- Nuevo Laredo Cantina

Austin, TX

- Tacodeli

Baltimore, MD

- R & R Taqueria

Boston, MA

- El Sarape

Chicago, IL

- Topolobampo

Dallas-Fort Worth, TX

- Esperanza's Mexican Bakery & Cafe

Fort Lauderdale, FL

- Eduardo de San Angel

Honolulu, HI

- Maui Tacos

Houston, TX

- Irma's Southwest Grill

Las Vegas, NV

- Cafe Rio Mexican Grill

Los Angeles, CA

- Babita Mexicuisine

Miami, FL

- Chéen Huaye

New Orleans, LA

- Felipe's Taqueria

New York, NY

- Mercado-Mercadito Grove

Orlando, FL

- Agave Azul

Philadelphia, PA

- Paloma Mexican Haute Cuisine

Portland, OR

- Autentica

San Diego, CA

- Las Cuatro Milpas

San Francisco, CA

- El Castillito

Washington, DC

- Oyamel

117.4 Best Sandwich Restaurant

Zagat Survey selected the following as the best restaurants for a sandwich:

Atlanta, GA

- Rising Roll Gourmet

Baltimore, MD

- Attman's Delicatessen

Boston, MA

- Flour Bakery & Café

Chicago, IL

- Fontano's Subs

Cleveland, OH

- Melt Bar & Grilled

Columbus, OH

- Katzinger's

Fort Lauderdale, FL

- LaSpada's Original Hoagies

Las Vegas, NV

- Capriotti's Sandwich Shop

Los Angeles, CA

- Langer's Deli

New Orleans, LA

- Domilise's Po-Boys

New York, NY

- Num Pang

Philadelphia, PA

- John's Roast Pork

Portland, OR

- Bunk Sandwiches

San Diego, CA

- Cheese Shop

San Francisco, CA

- Saigon Sandwiches

Seattle, WA

- Paseo

Washington, DC

- C.F. Folks

117.5 Best Service

Zagat Survey (February 2013) selected the following restaurants for service in 25 metropolitan areas:

Atlanta, GA

- Bone's Restaurant

Austin, TX

- Congress

Baltimore, MD

- Charleston

Boston, MA

- Menton

Chicago, IL

- Next

Cincinnati, OH

- Orchids at Palm Court at the Hilton Netherland Plaza

Cleveland, OH

- Giovanni's Ristorante

Columbus, OH

- Refectory

Dallas, TX

- French Room in the Hotel Adolphus

Detroit, MI

- Moro's Dining (Allen Park)

Houston, TX

- Brennan's

Indianapolis, IN

- The Capital Grille

Kansas City, KS/MO

- Café Provence (Prairie Village, KS)

Las Vegas, NV

- Michael's at the South Point Hotel

Los Angeles, CA

- Providence

Minneapolis, MN

- La Belle Vie

New York, NY

- Per Se in the Time Warner Center

Philadelphia, PA

- Fountain Restaurant at the Four Seasons

Portland, OR

- The Painted Lady (Newberg, OR)

San Antonio, TX

- Chama Gaucha

San Diego, CA

- Addison at the Grand Del Mar

San Francisco, CA

- Gary Danko

Salt Lake City, UT

- The Mariposa (Deer Valley, UT)

St. Louis, MO

- Anthony's

Washington, DC

- Inn at Little Washington (Washington, VA)

117.6 Business Trip Dining

Zagat Survey selected the following restaurants in major metropolitan areas as the best for dining during a business trip:

Atlanta, GA

1. Bacchanalia
2. Quinones Room
3. Aria
4. McKendrick's
5. Bone's

Atlantic City, NJ

1. Old Homestead

2. Il Mulino
3. Chef Vola's
4. White House
5. Girasole

Austin, TX

1. Uchi
2. Eddie V's
3. Wink
4. Torchy's Tacos
5. Vespaio

Baltimore/Annapolis, MD

1. Charleston
2. Volt
3. Prime Rib
4. Samos
5. Di Pasquale's

Boston, MA

1. O Ya
2. Oleana
3. La Campania
4. Nuptune Oyster
5. Lumiere

Charlotte, NC

1. Barrington's
2. McNinch House
3. Fiamma
4. Fig Tree
5. Toscana

Chicago, IL

1. Les Nomades
2. Alinea
3. Schwa
4. Arun's
5. Topolobampo

Cincinnati, OH

1. Boca
2. Nicola's
3. Daveed's

4. Jeff Ruby's Precinct
5. Orchids

Cleveland, OH

1. Chez Francois
2. Johnny's Bar
3. Parallax
4. Lola
5. Downtown 140

Columbus, OH

1. L'Antibes
2. Refectory
3. Akai Hana
4. Cameron's
5. G. Michael's

Connecticut

1. Le Petit Cafe
2. PolytechnicON20
3. Thomas Henkelmann
4. Mill at 2T
5. Jean-Louis

Dallas/Ft. Worth, TX

1. Bonnell's
2. Saint Emilion
3. French Room
4. Cacharel
5. Pappas Bros.

Denver, CO

1. Fruition
2. Frasca
3. Matsuhisa
4. Splendido
5. Mizuna

Detroit, MI

1. Lark
2. Bacco
3. Common Grill
4. Zingerman's
5. Cafe Cortina

Fort Lauderdale, FL

1. La Brochette
2. Cafe Sharaku
3. Canyon
4. Casa D'Angelo
5. Eduardo de San Angel

Honolulu, HI

1. Sushi Sasabune
2. Hiroshi
3. Alan Wong's
4. La Mer
5. Chef Mavro

Houston, TX

1. Le Mistral
2. Kanomwan
3. Pappas Bros. Steakhouse
4. Mark's
5. Da Marco

Kansas City, MO

1. Justus Drugstore
2. Bluestem
3. Michael Smith
4. Oklahoma Joe's
5. Le Fou Frog

Las Vegas, NV

1. Joël Robuchon at the Mansion
2. Todd's Unique Dining
3. Steak House
4. Raku
5. Sen of Japan

Long Island, NY

1. North Fork Table
2. Siam Lotus
3. Mosaic
4. Kitchen A Trattoria
5. Maroni

Los Angeles, CA

1. Matsuhisa
2. Angelini Osteria
3. Asanebo
4. Melisse
5. Urasawa

Miami, FL

1. Naoe
2. Palme d'Or
3. Zuma
4. Palm
5. Il Gabbiano

Milwaukee, WI

1. Roots
2. Sanford
3. Eddie Martini's
4. Bartolotta's Lake Park
5. Ristorante Bartolotta

Minneapolis/Saint Paul, MN

1. La Belle Vie
2. 112 Eatery
3. Vincent
4. Alma
5. Bar La Grassa

Naples, FL

1. Cote d'Azur
2. Bleu Provence
3. USS Nemo
4. Truluck's
5. Capital Grille

New Jersey

1. Nicholas
2. Shumi
3. Saponi
4. Washington Inn
5. Lorena's

New Orleans, LA

1. Bayona
2. Stella!
3. Brigtsen's
4. Clancy's
5. Royal China

New York, NY

1. Le Bernardin
2. Daniel
3. Per Se
4. Bouley
5. Jean Georges

Orange County, CA

1. Marche Moderne
2. Basilic
3. Tradition by Pascal
4. Hobbit
5. Studio

Orlando, FL

1. Victoria & Albert's
2. 4 Rivers
3. Del Frisco's
4. Jiko
5. California Grill

Palm Beach, FL

1. Marcello's La Sirena
2. Chez Jean-Pierre
3. 11 Maple St.
4. Captain Charlie's
5. Cafe L'Europe

Philadelphia, PA

1. Vetri
2. Fountain
3. Birchrunville Store
4. Amada
5. Gilmore's

Phoenix/Scottsdale, AZ

1. Kai
2. Binkley's
3. Quiescence
4. Noca
5. Barrio Cafe

Portland, OR

1. Painted Lady
2. Apizza Scholls
3. Beast
4. Toro Bravo
5. Nuestra Cocina

Sacramento, CA

1. Taste
2. Ambience
3. Mulvaney's
4. Kitchen
5. Sunflower Drive-In

Salt Lake City, UT

1. Mariposa
2. Forage
3. Takashi
4. Mandarin
5. Tree Room

San Antonio, TX

1. Dough
2. Il Sogno
3. Bohanan's
4. Frederick's
5. Bistro Vatel

San Diego, CA

1. Market
2. Sushi Ota
3. Hane Sushi
4. Wine Vault
5. Addison

San Francisco, CA

1. Gary Danko
2. French Laundry
3. Cyrus
4. Manresa
5. Aubergine

Seattle, WA

1. Cafe Juanita
2. Paseo
3. Mashiko
4. Spinasse
5. Herbfarm (Woodinville)

St. Louis, MO

1. Niche
2. Stellina
3. Sidney St. Cafe
4. Trattoria Marcella
5. Tony's

Tampa/Sarasota, FL

1. Beach Bistro
2. Pane Rustica
3. Bern's Steak House
4. Cafe Ponte
5. Maison Blanche

Tucson, AZ

1. Fleming's Prime
2. Vivace
3. Dish
4. Le Rendez-Vous
5. Cafe Poca Cosa

Washington, DC

1. Marcel's
2. Inn at Little Washington
3. Komi
4. CityZen
5. Rasika

Westchester/Hudson Valley

1. Sushi Nanase
2. Xaviars at Piermont
3. Il Cenacolo
4. Freelance Cafe
5. Buffet de la Gare

117.7 Hotel Restaurants

Zagat Survey selected the following top hotel restaurants in 25 metropolitan areas:

Atlanta, GA

- La Grotta Ravinia (Crowne Plaza Ravinia)

Austin, TX

- Driskill Grill (Driskill Hotel)

Boston, MA

- Clio (Eliot)

Chicago, IL

- The Lobby (The Peninsula)

Dallas/Fort Worth, TX

- French Room (The Adolphus)

Denver, CO

- Restaurant Kevin Taylor (Hotel Teatro)

Detroit, MI

- Saltwater (MGM Grand Casino)

Honolulu, HI

- La Mer (Halekulani)

Houston, TX

- Quattro (Four Seasons)

Las Vegas, NV

- L'Atelier de Jol Robuchon (MGM Grand)

Los Angeles, CA

- Saam at the Bazaar by José Andrés (SLS at Beverly Hills)

Miami, FL

- Palme d'Or (Biltmore)

Milwaukee, WI

- Osteria del Mondo (Knickerbocker)

Minneapolis, MN

- Manny's Steakhouse (W Minneapolis - The Foshay)

New Orleans, LA

- Stella! (Hotel Provincial)

New York, NY

- Jean Georges (Trump International)

Orlando, FL

- Victoria & Albert's (Disney's Grand Floridian Resort & Spa)

Philadelphia, PA

- Fountain Restaurant (Four Seasons)

Phoenix, AZ

- T. Cook's (Royal Palms Resort & Spa)

Salt Lake City, UT

- Spencer's For Steaks & Chops (Hilton Salt Lake City Center)

San Antonio, TX

- Las Canarias (Omni La Mansin del Rio)

San Diego, CA

- Addison (The Grand Del Mar)

San Francisco, CA

- Masa's (Hotel Vintage Court)

Seattle, WA

- Inn at Langley (Inn at Langley)

Washington, DC

- CityZen (Mandarin Oriental)

117.8 Market Resources

Zagat Survey, 4 Columbus Circle, 3rd Floor, New York, NY 10019. (800) 540-9609.
(www.zagat.com)

STAR DIAMOND AWARD

118.1 Overview

Since 1949, the American Academy of Hospitality Sciences (AAHS) has recognized restaurants with its Star Diamond Award (www.stardiamondaward.com).

118.2 Five Star Diamond Awards 2013

Five Star Diamond designations were given to the following U.S. restaurants:

- ABC Kitchen (New York, NY)
- Adour Alain Ducasse (New York, NY)
- Anaheim White House Restaurant (Anaheim, CA)
- Bouley (New York, NY)
- Bryant & Cooper Steakhouse (Rosly, NY)
- Café L' Europe (Palm Beach, FL)
- Café Milano (Washington, DC)
- Cipollini (Manhasset, NY)
- City Hall (New York, NY)
- Da Umberton (New York, NY)
- David Burke Fromagerie (Rumson, NJ)
- David Burke Kitchen (New York, NY)
- David Burke Townhouse (New York, NY)
- David Burke's Primehouse (Chicago, IL)
- Empire Steak House (New York, NY)
- Fishtail by David Burke (New York, NY)
- Garwood Lounge & Piano Bar (Fisher Island, FL)
- Gigino Trattoria (New York, NY)
- Hendrick's Tavern (Roslyn, NY)
- Giumarello's (Westmont, NJ)
- J&G Steakhouse (Washington, DC)
- Jean Georges (New York, NY)
- JUNGSIK (New York, NY)
- La Dorada (Coral Gables, FL)
- Le Bernardin (New York, NY)
- LeMont Restaurant (Pittsburgh, PA)
- MEGU Midtown (New York, NY)

- Mark's American Cuisine (Houston, TX)
- Maya Restaurant (New York, NY)
- MEGU New York (New York, NY)
- Mr. K's (New York, NY)
- ON20 (Hartford, CT)
- Ortanique On The Mile (Coral Gables, FL)
- Park Side Restaurant (Corona, NY)
- Paul & Jimmy's (New York, NY)
- Per Se Restaurant (New York, NY)
- Quattro Gastronomia Italiana (Miami Beach, FL)
- Seasonal Restaurant & Weinbar (New York, NY)
- Smoke Rise Village Inn (Kinnelon, NJ)
- Spice Market (New York, NY)
- Stresa Ristorante Italiano (Manhasset, NY)
- Thai Spice (Fort Lauderdale, FL)
- The Addison (Boca Raton, FL)
- The Carltun (East Meadow, NY)
- The Forge Restaurant Wine Bar (Miami Beach, FL)
- The Mercer Kitchen (New York, NY)
- Toku (Manhasset, NY)
- Vetro Restaurant & Lounge (Howard Beach, NY)

THE NRN 50

119.1 Overview

The NRN 50 is an annual feature of *Nation's Restaurant News*. The 2013 list presented the restaurant industry's "Breakout Brands."

"NRN's nationwide network of editors scouted their regions looking for unique up-and-coming brands. The criteria to qualify as a "Breakout Brand" were both concrete and intuitive. Brands had to range in size from a couple of units to 75, have an interesting point of differentiation and have demonstrable expansion plans. We profile some of today's hottest emerging concepts – ones making their marks with their innovative experiences and cutting-edge cuisines."

Robin Lee Allen, Executive Editor
Nation's Restaurant News, 1/28/13

119.2 Breakout Brands 2013

The following Breakout Brands comprise the 2013 NRN 50:

- 5 Napkin Burger
- America's Taco Shop
- Argo Tea
- Asian Box
- Bagger Dave's Legendary Burger Tavern
- Bar Louie

- Blue Lemon
- Boloco
- Brick House Tavern + Tap
- Bruxië
- Burtons Grill
- Cafe Rio Mexican Grill
- Cheeseboy
- Chop't Creative Salad Co.
- Cooper's Hawk Winery & Restaurant
- Evolution Fresh
- Fresh to Order
- Garbanzo Mediterranean Grill
- HuHot Mongolian Grill
- Jeni's Splendid Ice Creams
- Jim 'N Nick's Bar-B-Q
- Just Salad
- Little Greek
- Marlow's Tavern
- Max's Wine Dive
- Meatheads
- Melt Bar & Grilled
- Mendocino Farms
- MOD Pizza
- Patxi's Pizza
- Plada Italian Street Food
- Pitfire Artisan Pizza
- Protein Bar
- Pure Taqueria
- Rosa Mexicano
- Roti Mediterranean Grill
- Seasons 52
- Shake Shack
- Snooze, an A.M. Eatery
- Spin! Neapolitan Pizza
- Tender Greens
- Texas de Brazil
- The Meatball Shop
- The Melt
- Tom & Eddie's
- Toppers Pizza
- True Food Kitchen
- Umami Burger
- Veggie Grill
- Zoës Kitchen

119.3 Market Resources

Nation's Restaurant News, 249 W. 17th Street, New York, NY 10011. (212) 204-4200.
(www.nrn.com)

TOP BEER BARS

120.1 Award Winners 2013

Draft designates America's 100 Best Beer Bars annually. The following are the 2013 designations:

Alabama

- The J. Clyde Hot Rock Tavern and Alehouse (Birmingham)
- The Nook (Huntsville)

Arizona

- Papago Brewing Co. (Scottsdale)

California

- Beer Revolution (Oakland)
- Blind Lady Ale House (San Diego)
- Blue Palms Brewhouse (Hollywood)
- Churchill's Pub and Grille (San Marcos)
- El Prado (Los Angeles)
- Encinitas Ale House (Encinitas)
- Father's Office (Santa Monica)
- Hamilton's Tavern (San Diego)
- La Trappe Café (San Francisco)
- Little Bear (Los Angeles)
- O'Brien's American Pub (San Diego)
- Small Bar (San Diego)
- Surly Goat (Hollywood)
- The Daily Pint (Los Angeles)
- The Toronado Pub (San Francisco)
- The Trappist (Oakland)
- Tiger! Tiger! (San Diego)
- Tony's Darts Away (Burbank)

Colorado

- Falling Rock (Denver)

District of Columbia

- ChurchKey (Washington)

Florida

- Mr. Beery's (Sarasota)
- Redlight, Redlight (Orlando)

Georgia

- Brick Store Pub (Atlanta)
- The Porter Beer Bar (Atlanta)
- Trapeze Pub (Athens)

Illinois

- Bangers & Lace (Chicago)
- Fountainhead (Chicago)
- Local Option (Chicago)
- Map Room (Chicago)
- Michael & Louise's Hopleaf Bar (Chicago)
- Old Town Pour House (Chicago)
- Sheffield's (Chicago)

Indiana

- Heorot (Muncie)

Iowa

- El Bait Shop (Des Moines)
- Royal Mile (Des Moines)

Kentucky

- Holy Grale (Louisville)
- Sergio's World Beers (Louisville)

Louisiana

- The Avenue Pub (New Orleans)

Maine

- Ebenezer's Pub (Lovell)
- Novare Res Bier Café (Portland)
- The Great Lost Bear (Portland)

Maryland

- Max's Taphouse (Baltimore)
- The Brewer's Art (Baltimore)

Massachusetts

- Deep Ellum (Allston)

- Sunset Grill & Tap (Allston)
- The Publick House (Brookline)

Michigan

- Ashley's (Ann Arbor)
- Clubhouse BFD (Rochester Hills)
- Hopcat (Grand Rapids)
- The Mitten Bar (Ludington)

Minnesota

- Republic (Minneapolis)
- The Happy Gnome (Saint Paul)

Missouri

- Bridge (St. Louis)
- International Tap House (St. Louis)
- The Foundry (Kansas City)

Nebraska

- Crescent Moon Ale House (Omaha)
- Krug Park (Omaha)

New York

- Bierkraft (Brooklyn)
- Blind Tiger (New York)
- Rattle N Hum (New York)
- Spuyten Duyvil (Brooklyn)
- Top Hops Beer Shop (New York)

North Carolina

- Brewmasters Bar & Grill (Raleigh)
- Busy Bee Café (Raleigh)
- Growlers Pourhouse (Charlotte)
- Harrika's Brew Haus (Swansboro)
- Thirsty Monk (Asheville)

Ohio

- Buckeye Beer Engine (Lakewood)
- La Cave Du Vin (Cleveland)
- McNulty's Bier Markt (Cleveland)

Oklahoma

- TapWerks Alehouse & Café (Oklahoma City)

Oregon

- Apex (Portland)
- Bailey's TapRoom (Portland)
- Belmont Station (Portland)
- Horse Brass Pub (Portland)
- Saraveza Bottle Shop & Pasty Tavern (Portland)

Pennsylvania

- Eulogy Belgian Tavern (Philadelphia)
- Memphis Taproom (Philadelphia)
- Monk's Café (Philadelphia)
- The Farmhouse (Emmaus)
- The Grey Lodge Public House (Philadelphia)

South Carolina

- Closed for Business (Charleston)

Texas

- Draught House (Austin)
- Petrol Station (Houston)
- Strangeways (Dallas)
- The Hay Merchant (Houston)

Vermont

- Three Penny Taproom (Montpelier)

Washington

- Beveridge Place Pub (Seattle)
- Naked City Tap House (Seattle)
- Stumbling Monk (Seattle)
- The Pine Box (Seattle)

Wisconsin

- Palm Tavern (Milwaukee)
- Romans' Pub (Milwaukee)
- Sugar Maple (Milwaukee)
- The Malt House Tavern (Madison)

TOP RESTAURANT BRANDS

121.1 Overview

Since 2003, The EquiTrend® study by Harris Poll (www.harrisinteractive.com) has rated U.S. restaurant brands based on familiarity, quality, and purchase consideration.

121.2 Top Brand Scores 2013

The 2013 EquiTrend® study was conducted online among over 25,000 U.S. consumers ages 15 and older. The following were the top-ranked U.S. restaurant brands:

Casual-Dining Chains

- Panera Bread
- Longhorn Steakhouse
- IHOP (International House of Pancakes)
- Outback Steakhouse
- Red Lobster Seafood Restaurants
- Chili's Grill & Bar
- Applebee's

Coffee & Quick-Service

- Dunkin' Donuts Stores
- Einstein Bros. Bagels
- Starbucks Coffee Shops

Fast-Casual Chains

- Chipotle Mexican Grill
- Moe's Southwest Grill

Italian Dining

- Olive Garden

Pizza Chain

- Pizza Hut

Quick-Service Chains

- Subway
- Dairy Queen
- Five Guys Burgers and Fries
- Wendy's
- In-N-Out Burger
- McDonald's
- Chick-fil-A
- Noodles & Company
- Taco Bell

121.3 Market Resources

Harris Interactive, 60 Corporate Woods, Rochester, NY 14623. (585) 272-8400.
(www.harrisinteractive.com)

WINE SPECTATOR GRAND AWARD

122.1 Overview

Wine Spectator gives awards of three levels annually for outstanding restaurant wine lists: the Award of Excellence, The Best of Award of Excellence, and the Grand Award. In 2013, there were 2,870, 850, and 73 recipients of these awards, respectively.

122.2 Award Recipients 2013

U.S. Grand Award recipients for 2013 are as follows:

Arizona

- Anthony's in the Catalinas (Tucson)

California

- Acquerello (San Francisco)
- Addison (San Diego)
- Marinus Restaurant at Bernardus Lodge (Carmel Valley)
- Patina (Los Angeles)
- Restaurant 301 at Hotel Carter (Eureka)
- Restaurant Gary Danko (San Francisco)
- RN74 (San Francisco)
- Sierra Mar (Big Sur)
- Spago Beverly Hills (Beverly Hills)
- The French Laundry (Yountville)
- The Village Pub (Woodside)
- The WineSellar & Brasserie (San Diego)
- Valentino (Santa Monica)

Colorado

- Element 47 (Aspen)
- Flagstaff House Restaurant (Boulder)

Florida

- Bern's Steak House (Tampa)
- HMF (Palm Beach)

Illinois

- Tru (Chicago)

Louisiana

- Commander's Palace (New Orleans)
- Emeril's New Orleans (New Orleans)

Massachusetts

- Blantyre (Lenox)
- Left Bank at Stonehedge Inn (Tyngsboro)
- Topper's at the Wauwinet (Nantucket)

Nevada

- Aureole Las Vegas at Mandalay Bay (Las Vegas)
- Delmonico Steakhouse at The Venetian (Las Vegas)
- Joël Robuchon Restaurant at MGM Grand (Las Vegas)
- Picasso at Bellagio (Las Vegas)
- Restaurant Guy Savoy (Las Vegas)

New Jersey

- Restaurant Latour at Crystal Springs Resort (Hardyston)
- The Pluckemin Inn (Bedminster)

New Mexico

- Billy Crews Dining Room (Santa Teresa)

New York

- "21" Club (New York)
- A Voce Columbus (New York)
- Crabtree's Kittle House (Chappaqua)
- Daniel (New York)
- Del Posto (New York)
- Eleven Madison Park (New York)
- Per Se (New York)
- The American Hotel (Long Island)
- Tribeca Grill (New York)
- Veritas (New York)

North Carolina

- The Angus Barn (Raleigh)

Tennessee

- Blackberry Farm (Walland)

Texas

- Pappas Bros. Steakhouse (Dallas)
- Pappas Bros. Steakhouse (Houston)

Virginia

- The Inn at Little Washington (Washington)

Washington

- Canlis Restaurant (Seattle)
- Wild Ginger (Seattle)

WORLD'S BEST RESTAURANTS

123.1 Best Restaurants

Among various lists of award-winning fine-dining restaurants, The World's 50 Best Restaurants, published annually by British magazine *Restaurant*, is the most recognized. The ranking is based on a poll of international chefs, restaurateurs, gourmands, and restaurant critics.

123.2 Award Winners For 2013

Restaurant's The World's 50 Best Restaurants for 2013 is as follows:

1. El Celler de Can Roca (Girona, Spain)
2. Noma (Copenhagen, Denmark)
3. Osteria Francescana (Modena, Italy)
4. Mugaritz (San Sebastián, Spain)
5. Eleven Madison Park (New York, NY; United States)
6. D.O.M (São Paulo, Brazil)
7. Dinner By Heston Blumenthal (London, United Kingdom)
8. Arzak (San Sebastián, Spain)
9. Steirereck (Vienna, Austria)
10. Vendôme (Bergisch Gladbach, Germany)
11. Per Se (New York, NY, United States)
12. Restaurant Frantzén (Stockholm, Sweden)
13. The Ledbury (London, United Kingdom)
14. Astrid y Gaston (Lima, Peru)
15. Alinea (Chicago, IL, United States)
16. L'arpège (Paris, France)
17. Pujol (Mexico City, Mexico)
18. Le Chateaubriand (Paris, France)
19. Le Bernardin (New York, NY, United States)
20. Narisawa (Tokyo, Japan)
21. Attica (Melbourne, Australia)
22. Nihnroryi RyuGin (Tokyo, Japan)
23. L'Astrance (Paris, France)
24. L'Atelier Saint-Germain de Joël Robuchon (Paris, France)
25. Hof Van Cleve (Kruishoutem, Belgium)

26. Quique Dacosta (Denia, Spain)
27. Le Calandre (Rubano, Italy)
28. Mirazur (Menton, France)
29. Daniel (New York, NY, United States)
30. Aqua (Wolfsburg, Germany)
31. Biko (Mexico City, Mexico)
32. Nahm (Bangkok, Thailand)
33. The Fat Duck (Bray, United Kingdom)
34. Fäviken (Järpen, Sweden)
35. Oud Sluis (Sluis, Netherlands)
36. Amber (Hong Kong)
37. Villa Joya (Albufeira, Portugal)
38. Restaurant Andre (Singapore)
39. 8½ Otto e Mezzo Bombana (Hong Kong)
40. Combal.Zero (Rivoli, Italy)
41. Piazza Duomo (Alba, Italy)
42. Schloss Schauenstein (Fürstenau, Switzerland)
43. Mr & Mrs Bund (Shanghai, China)
44. Asador Etxebarri (Atxondo, Spain)
45. Geranium (Copenhagen, Denmark)
46. Mani (São Paulo, Brazil)
47. The French Laundry (Yountville, CA, United States)
48. Quay (Sydney, Australia)
49. Septime (Paris, France)
50. Central (Lima, Peru)

PART XII: FOOD & BEVERAGE DESIGNATIONS

NATIONAL FOOD & BEVERAGE HOLIDAYS

124.1 Overview

There are hundreds of designations of days, weeks, and months that recognize a specific food or beverage. Some designations are made by official proclamation while others are de facto designations; none have the force of the law. Most official food holiday designations are promulgated by the U.S. Chamber of Commerce, trade associations, or public relations firms as a promotional vehicle. The President of the United States declares about 150 commemorative days each year; proclamation of food days by the President are rare.

The following are lists of national food & beverage designations recognized in the United States.

124.2 National Food & Beverage Days

January

- January 1: Bloody Mary Day
- January 1: Apple Gifting Day
- January 2: National Cream Puff Day
- January 3: Chocolate-Filled Cherry Day
- January 4: National Spaghetti Day
- January 5: National Whipped Cream Day
- January 6: Bean Day
- January 6: National Shortbread Day
- January 7: National Tempura Day
- January 8: English Toffee Day
- January 9: National Apricot Day
- January 10: Bittersweet Chocolate Day
- January 11: Hot Toddy Day
- January 11: Milk Day
- January 12: Curried Chicken Day
- January 13: National Peach Melba Day
- January 14: National Hot Pastrami Sandwich Day
- January 15: Strawberry Ice Cream Day
- January 16: International Hot & Spicy Food Day
- January 16: National Fig Newton Day

- January 17: Hot-Buttered Rum Day
- January 18: Peking Duck Day
- January 19: National Popcorn Day
- January 20: National Buttercrunch Day
- January 20: National Cheese Lover's Day
- January 20: National Coffee Break Day
- January 20: National Granola Bar Day
- January 21: New England Clam Chowder Day
- January 22: National Blonde Brownie Day
- January 23: National Pie Day
- January 24: National Peanut Butter Day
- January 25: National Irish Coffee Day
- January 26: National Pistachio Day
- January 27: Chocolate Cake Day
- January 28: National Blueberry Pancake Day
- January 29: National Corn Chip Day
- January 30: National Croissant Day
- January 31: Brandy Alexander Day

February

- February 1: Baked Alaska Day
- February 2: Heavenly Hash Day
- February 3: Carrot Cake Day
- February 4: Homemade Soup Day
- February 5: National Chocolate Fondue Day
- February 6: National Frozen Yogurt Day
- February 7: National Fettuccine Alfredo Day
- February 8: National Molasses Bar Day
- February 9: National Bagels and Lox Day
- February 10: National Cream Cheese Brownie Day
- February 11: National Peppermint Patty Day
- February 12: National Plum Pudding Day
- February 13: National Tortini Day
- February 14: National Cream Filled Chocolates Day
- February 15: International Gumdrops Day
- February 16: National Almond Day
- February 17: National Cafe Au Lait Day
- February 18: National Crab Stuffed Flounder Day
- February 19: National Chocolate Mint Day
- February 20: National Cherry Pie Day
- February 21: National Sticky Bun Day
- February 22: National Margarita Day
- February 23: National Banana Bread Day
- February 24: National Tortilla Chip Day

- February 25: National Chocolate Covered Peanuts Day
- February 26: National Pistachio Day
- February 27: National Kahlua Day
- February 28: National Chocolate Souffle Day

March

- March 1: National Peanut Butter Lover's Day
- March 2: National Banana Cream Pie Day
- March 3: National Mulled Wine Day
- March 4: National Pound Cake Day
- March 5: National Cheese Doodle Day
- March 6: National Frozen Food Day
- March 7: National Crown Roast of Pork Day
- March 8: National Peanut Cluster Day
- March 9: National Crabmeat Day
- March 10: National Blueberry Popover Day
- March 11: National Oatmeal-Nut Waffle Day
- March 12: National Baked Scallops Day
- March 13: National Coconut Torte Day
- March 14: National Potato Chip Day
- March 15: National Pears Helene Day
- March 16: National Artichoke Hearts Day
- March 17: National Green Beer Day
- March 18: National Lacy Oatmeal Cookie Day
- March 19: National Chocolate Carmel Day
- March 20: National Ravioli Day
- March 21: National French Bread Day
- March 22: National Bavarian Crepes Day
- March 23: National Chip and Dip Day
- March 24: National Chocolate Covered Raisins Day
- March 25: National Lobster Newburg Day
- March 26: National Nougat Day
- March 27: National Spanish Paella Day
- March 28: National Black Forest Cake Day
- March 28: Something On A Stick Day
- March 29: National Lemon Chiffon Cake Day
- March 30: Turkey Neck Soup Day
- March 31: National Clams on the Half Shell Day
- March 31: Oranges and Lemons Day
- March 31: Tater Day

April

- 1st Monday: Sweet Potato Day
- Good Friday: National Hot Cross Bun Day

- Easter: National Baked Ham with Pineapple Day
- April 1: National Sourdough Bread Day
- April 2: National Peanut Butter & Jelly Day
- April 3: National Chocolate Moose Day
- April 4: Chocolate Milk Powder Day
- April 4: National Cordon Bleu Day
- April 5: National Caramel Day & Raisin and Spice Bar Day
- April 6: Fresh Tomato Day
- April 6: National Caramel Popcorn Day
- April 7: National Coffee Cake Day
- April 8: Milk in Glass Bottles Day
- April 8: National Empanada Day
- April 9: National Chinese Almond Cookie Day
- April 10: Cinnamon Crescent Day
- April 11: National Cheese Fondue Day
- April 12: National Licorice Day
- April 12: Grilled Cheese Sandwich Day
- April 13: National Peach Cobbler Day
- April 14: National Pecan Day
- April 15: Glazed Spiral Ham Day
- April 16: National Eggs Benedict Day
- April 16: Day of the Mushroom
- April 17: National Cheese Ball Day
- April 18: National Animal Cracker Day
- April 19: Garlic Day
- April 19: Amaretto Day
- April 20: Pineapple Upside Down Cake Day
- April 20: Lima Bean Respect Day
- April 21: Chocolate-Covered Cashew Truffle Day
- April 22: Jelly Bean Day
- April 23: Picnic Day
- April 24: Pigs-in-a-Blanket Day
- April 25: National Zucchini Bread Day
- April 26: National Pretzel Day
- April 27: Prime Rib Day
- April 28: National Blueberry Pie Day
- April 29: National Shrimp Scampi Day
- April 30: National Oatmeal Cookie Day
- April 30: Raisin Day

May

- May 1: National Chocolate Parfait Day
- May 2: National Truffles Day
- May 3: National Raspberry Tart Day

- May 4: National Orange Juice Day
- May 4: National Homebrew Day
- May 4: National Candied Orange Peel Day
- May 5: National Chocolate Custard Day
- May 5: Totally Chipotle Day
- May 5: National Hoagie Day
- May 6: National Crepes Suzette Day
- May 6: International No Diet Day
- May 6: National Beverage Day
- May 7: National Roast Leg of Lamb Day
- May 8: National Coconut Cream Pie Day
- May 8: National Empanada Day
- May 9: National Butterscotch Brownie Day
- May 10: National Shrimp Day
- May 11: National Mocha Torte Day
- May 11: Eat What You Want Day
- May 12: National Nutty Fudge Day
- May 13: National Apple Pie Day
- May 13: National Fruit Cocktail Day
- May 14: National Buttermilk Biscuit Day
- May 15: National Chocolate Chip Day
- May 16: National Coquilles St. Jacques Day
- May 17: National Cherry Cobbler Day
- May 18: National Cheese Soufflé Day
- May 19: National Devil's Food Cake Day
- May 20: National Quiche Lorraine Day
- May 20: Pick Strawberries Day
- May 21: National Strawberries & Cream Day
- May 22: National Vanilla Pudding Day
- May 23: National Taffy Day
- May 24: National Escargot Day
- May 25: National Wine Day
- May 25: National Brown Bag it Day
- May 26: National Blueberry Cheesecake Day
- May 26: National Cherry Dessert Day
- May 27: National Grape Popsicle Day
- May 28: National Brisket Day
- May 28: National Hamburger Day
- May 29: National Coq Au Vin Day
- May 30: National Mint Julep Day
- May 30: National Macaroon Day

June

- 1st Friday: National Doughnut Day
- June 1: National Hazelnut Cake Day
- June 2: National Chocolate Macaroon Day
- June 3: National Rocky Road Day
- June 4: National Frozen Yogurt Day
- June 5: National Gingerbread Day
- June 6: National Applesauce Cake Day
- June 7: National Chocolate Ice Cream Day
- June 9: National Strawberry Rhubarb Pie Day
- June 10: National Black Cow Day
- June 11: National German Chocolate Day
- June 12: National Peanut Butter Cookie Day
- June 13: National Lobster Day
- June 14: National Strawberry Shortcake Day
- June 16: National Fudge Day
- June 17: National Apple Streudel Day
- June 18: National Cherry Tart Day
- June 19: National Martini Day
- June 20: National Vanilla Milkshake Day
- June 21: National Peaches & Cream Day
- June 22: National Chocolate Eclair Day
- June 23: National Pecan Sandy Day
- June 24: National Creamy Pralines Day
- June 25: National Strawberry Parfait Day
- June 26: National Chocolate Pudding Day
- June 27: National Orange Blossom Day
- June 28: National Tapioca Day
- June 29: National Almond Butter Crunch Day
- June 30: National Ice Cream Soda Day

July

- 3rd Sunday: Sundae Day
- July 1: Creative Ice Cream Flavor Day
- July 1: National Gingersnap Day
- July 2: National Anisette Day
- July 3: National Chocolate Wafer Day
- July 3: Eat Beans Day
- July 4: National Barbecued Spareribs Day
- July 4: Caesar Salad Birthday
- July 4: Sidewalk Egg Frying Day
- July 5: National Apple Turnover Day
- July 5: Graham Cracker Day
- July 6: National Fried Chicken Day

- July 7: National Strawberry Sundae Day
- July 7: Chocolate Day
- July 7: Macaroni day
- July 7: Ice Cream Cone Day
- July 8: National Milk Chocolate with Almonds Day
- July 9: National Sugar Cookie Day
- July 10: National Piña Colada Day
- July 11: National Blueberry Muffin Day
- July 11: Vegetarian Food Day
- July 12: National Pecan Pie Day
- July 12: National Blueberry Muffin Day
- July 12: Eat Your Jello Day
- July 13: National Ice Cream Day
- July 13: National French Fries Day
- July 14: National Grand Marnier Day
- July 15: National Tapioca Pudding Day
- July 15: Gummi Worm Day
- July 16: National Corn Fritters Day
- July 16: Ice Cream Sundae Day
- July 16: Fresh Spinach Day
- July 16: National Ice Cream Day
- July 17: National Peach Ice Cream Day
- July 18: National Caviar Day
- July 19: National Daiquiri Day
- July 20: National Lollipop Day
- July 20: National Ice Cream Soda Day
- July 20: Fortune Cookie Day
- July 21: National Junk Food Day
- July 21: National Creme Brulee Day
- July 22: National Penuche Fudge Day
- July 22: Maple Syrup Day
- July 23: National Vanilla Ice Cream Day
- July 23: National Hot Dog Day
- July 24: National Tequila Day
- July 25: National Hot Fudge Sundae Day
- July 26: National Coffee Milkshake Day
- July 27: National Scotch Day
- July 27: National Cream Brulee Day
- July 28: National Milk Chocolate Day
- July 29: National Lasagna Day
- July 30: National Cheesecake Day
- July 31: Cotton Candy Day
- July 31: Jump for Jelly Beans Day
- July 31: National Raspberry Cake Day

August

- 1st Saturday: National Mustard Day
- August 1: National Raspberry Cream Pie Day
- August 2: National Ice Cream Sandwich Day
- August 3: National Watermelon Day
- August 4: National Chocolate Chip Day
- August 4: National Champagne Day
- August 6: National Root Beer Float Day
- August 7: National Raspberries & Cream Day
- August 8: National Frozen Custard Day
- August 9: National Rice Pudding Day
- August 10: National S'Mores Day
- August 11: National Raspberry Bombe Day
- August 12: National Toasted Almond Bar Day
- August 13: National Filet Mignon Day
- August 14: National Creamsicle Day
- August 15: National Lemon Meringue Pie Day
- August 16: National Rum Day
- August 17: National Vanilla Custard Day
- August 17: Cup Cake Day
- August 18: National Ice Cream Pie Day
- August 19: National Soft Ice Cream Day
- August 20: National Chocolate Pecan Pie Day
- August 20: National Lemonade Day
- August 21: National Spumoni Day
- August 22: National Pecan Torte Day
- August 23: National Spongecake Day
- August 24: National Waffle Day
- August 24: National Peach Pie Day
- August 25: National Banana Split Day
- August 25: National Waffle Day
- August 26: National Cherry Popsicle Day
- August 27: National Pots du Creme Day
- August 28: National Cherry Turnover Day
- August 29: Eat Healthy Day
- August 29: National Whisky Sour Day
- August 29: More Herbs Less Salt Day
- August 29: National Lemon Juice Day
- August 30: National Marshmallow Toasting Day
- August 31: National Trail Mix Day
- August 31: Eat Outside Day

September

- September 1: National Cherry Popover Day
- September 2: National Blueberry Popsicle Day
- September 3: National Welsh Rarebit Day
- September 4: National Macadamia Nut Day
- September 4: Eat an Extra Dessert Day
- September 5: National Cheese Pizza Day
- September 6: National Coffee Ice Cream Day
- September 7: National Napoleon Day
- September 8: National Date-Nut Bread Day
- September 9: National Steak au Poivre Day
- September 11: National Hot Cross Bun Day
- September 12: National Chocolate Milkshake Day
- September 13: National Peanut Day
- September 14: National Cream-Filled Donut Day
- September 15: National Creme de Menthe Day
- September 17: National Apple Dumpling Day
- September 19: National Butterscotch Pudding Day
- September 20: National Rum Punch Day
- September 21: National Pecan Cookie Day
- September 22: National White Chocolate Day
- September 23: National Chocolate Day
- September 24: National Cherries Jubilee Day
- September 25: National Crab Newberg Day
- September 26: National Pancake Day
- September 27: National Chocolate Milk Day
- September 27: National Corned Beef Hash Day
- September 28: National Strawberry Cream Pie Day
- September 29: National Mocha Day
- September 30: National Mulled Cider Day

October

- 2nd Friday: World Egg Day
- October 1: World Vegetarian Day
- October 2: National French Fried Scallops Day
- October 3: National Carmel Custard Day
- October 4: National Taco Day
- October 5: National Apple Betty Day
- October 6: National Noodle Day
- October 7: National Frappe Day
- October 8: National Fluffernutter Day
- October 9: National Dessert Day
- October 10: National Angel Food Cake Day
- October 11: National Sausage Pizza Day

- October 13: National Yorkshire Pudding Day
- October 14: National Chocolate Covered Insect Day
- October 15: National Roast Pheasant Day
- October 15: Mushroom Day
- October 15: Chicken Cacciatore Day
- October 16: World Food Day
- October 16: Oatmeal Day
- October 17: National Pasta Day
- October 18: National Chocolate Cupcake Day
- October 19: National Seafood Bisque Day
- October 20: National Brandied Fruit Day
- October 21: National Pumpkin Cheesecake Day
- October 22: National Nut Day
- October 23: National Boston Cream Pie Day
- October 24: National Bologna Day
- October 25: National Greasy Foods Day
- October 26: National Mincemeat Pie Day
- October 27: National Potato Day
- October 28: National Chocolate Day
- October 29: National Pancake Day
- October 30: National Candy Corn Day
- October 31: National Caramel Apple Day

November

- November 1: National French Fried Clam Day
- November 2: National Deviled Egg Day
- November 3: Sandwich Day
- November 4: National Candy Day
- November 5: National Doughnut Day
- November 6: National Nachos Day
- November 7: Bittersweet Chocolate with Almonds Day
- November 8: National Harvey Wallbanger Day
- November 9: National Scrapple Day
- November 10: National Vanilla Cupcake Day
- November 11: National Sundae Day
- November 12: National Pizza with the Works Day
- November 13: National Indian Pudding Day
- November 14: National Guacamole Day
- November 16: National Fast Food Day
- November 17: National Baklava Day
- November 17: Homemade Bread Day
- November 18: National Vichyssoise Day
- November 19: Carbonated Beverage with Caffeine Day
- November 20: National Peanut Butter Fudge Day

- November 21: National Stuffing Day
- November 22: National Cranberry Relish Day
- November 23: National Cashew Day
- November 23: National Eat A Cranberry Day
- November 24: National Espresso Day
- November 25: National Parfait Day
- November 26: National Cake Day
- November 27: National Bavarian Cream Pie Day
- November 28: National French Toast Day
- November 29: National Chocolates Day
- November 30: National Mousse Day

December

- December 1: National Pie Day
- December 1: National Eat A Red Apple Day
- December 2: National Fritters Day
- December 3: National Ice Cream Box Day
- December 4: National Cookie Day
- December 5: National Sacher Torte Day
- December 6: National Gazpacho Day
- December 7: Cotton Candy Day
- December 8: Brownie Day
- December 9: National Pastry Day
- December 9: Apple Pie Day
- December 10: National Lager Day
- December 11: National Noodle-Ring Day
- December 12: National Ambrosia Day
- December 12: Gingerbread House Day
- December 13: National Cocoa Day
- December 14: National Bouillabaisse Day
- December 15: National Lemon Cupcake Day
- December 16: Chocolate Covered Anything Day
- December 17: National Maple Syrup Day
- December 18: National Roast Suckling Pig Day
- December 19: Oatmeal Muffin Day
- December 20: National Fried Shrimp Day
- December 20: National Sangria Day
- December 21: National Hamburger Day
- December 21: Kiwi Fruit Day (California)
- December 22: National Date Nut Bread Day
- December 23: National Pfeffernuesse Day
- December 24: National Egg Nog Day
- December 25: Pumpkin Pie Day
- December 26: National Candy Cane Day

- December 26: National Coffee Percolator Day
- December 27: National Fruit Cake Day
- December 28: National Chocolate Candy Day
- December 28: Chocolate Day
- December 29: Pepper Pot Day
- December 30: National Bicarbonate Of Soda Day
- December 31: National Champagne Day

124.3 National Food & Beverage Weeks

January

- National Pizza Week (second week)
- National Meat Week (fourth week)
- National Irish Coffee Week (fourth week)

February

- Great American Pizza Bake (second week)
- Kraut and Frankfurter Week (second week)
- National Pancake Week (fourth week)

March

- Chip Cookie Week (second week)
- American Chocolate Week (third week)

April

- National Bake Week (begins first Monday)
- National Egg Salad Week (second week)

May

- National Raisin Week (first week)
- National Herb Week (first week)
- National Hamburger Week (second week)
- International Pickles Week (third week)
- National Frozen Yogurt Week (fourth week)
- American Beer Week (fourth week)

June

(no designations)

July

- National Canned Luncheon Meat Week (first week)
- Don't Eat Meat Week (fourth week)
- National Salad Week (fourth week)

August

- National Apple Week (second week)

September

- National Waffle Week (second week)
- National Biscuit & Gravy Week (second week)
- Vegetarian Awareness Week (second week)
- National Wild Rice Week (fourth week)

October

- National Chili Week (first week)
- American Beer Week (second week)
- National Food Bank Week (second week)
- National School Lunch Week (second week)
- National Bulk Foods Week (third week)
- National Kraut Sandwich Week (third week)
- Pickled Peppers Week (third week)
- Chicken Soup for the Soul Week (fourth week)

November

- National Fig Week (first week)

December

- Cookie Cutter Week (first week)
- Lager Beer Week (second week)

124.4 National Food & Beverage Months**January**

- Bread Machine Baking Month
- Fat Free Living Month
- National Candy Month
- National Egg Month
- National Hot Tea Month
- National Meat Month
- National Oatmeal Month
- National Slow Cooking Month
- National Soup Month
- National Wheat Bread Month
- Prune Breakfast Month

February

- Berry Fresh Month
- Canned Food Month
- Celebration of Chocolate Month
- Great American Pies Month
- National Cherry Month
- National Fiber Focus Month
- National Fondue Month
- National Grapefruit Month
- National Heart Healthy Month
- National Hot Breakfast Month
- National Snack Food Month
- Potato Lover's Month
- Sweet Potato Month

March

- Great American Meatout Month
- International Hamburger & Pickle Month
- Maple Sugar Month
- National Celery Month
- National Flour Month
- National Frozen Food Month
- National Nutrition Month
- National Noodle Month
- National Peanut Month
- National Sauce Month
- National Caffeine Awareness Month

April

- Fresh Florida Tomato Month
- National BLT Sandwich Month
- National Garlic Month
- National Grilled Cheese Sandwich Month
- National Pecan Month
- National Soyfoods Month
- National Soft Pretzel Month

May

- National Asparagus Month
- National Barbecue Month
- National Chocolate Custard Month
- National Egg Month
- National Gazpacho Aficionado Month
- National Hamburger Month

- National Mediterranean Diet Month
- National Salad Month
- National Salsa Month
- National Strawberry Month

June

- National Beef Steak Month
- National Candy Month
- National Dairy Month
- National Fresh Fruit and Vegetables Month
- National Frozen Yogurt Month
- National Iced Tea Month
- National Papaya Month
- National Seafood Month
- National Turkey Lovers Month

July

- National Baked Bean Month
- National Berries Month
- National Bison Month
- National Culinary Arts Month
- National Grilling Month
- National Hot Dog Month
- National Ice Cream Month
- National Pickle Month
- National Picnic Month
- National Watermelon Month

August

- National Brownies At Brunch Month
- National Catfish Month
- National Panini Month
- National Peach Month
- National Sandwich Month

September

- California Wine Month
- Ethnic Foods Month
- National Biscuit Month
- National Bourbon Heritage Month
- National Breakfast Month
- National Chicken Month
- National Honey Month
- National Ice Cream Sandwich Month

- National Mushroom Month
- National Organic Harvest Month
- National Papaya Month
- National Potato Month
- National Rice Month
- Whole Grains Month

October

- Eat Country Ham Month
- Fair Trade Month
- National Apple Month
- National Applejack Month
- National Caramel Month
- National Chili Month
- National Cookie Month
- National Dessert Month
- National Pasta Month
- National Pickled Peppers Month
- National Pizza Festival Month
- National Popcorn Poppin' Month
- National Pork Month
- National Pretzel Month
- National Seafood Month
- Vegetarian Awareness Month

November

- Georgia Pecan Month
- Good Nutrition Month
- National Peanut Butter Lover's Month
- National Pepper Month
- National Pomegranate Month
- Raisin Bread Month
- Vegan Month

December

- National Egg Nog Month
- National Fruit Cake Month

STATE FOODS

125.1 Overview

Thirty-three (33) states have proclaimed one or more official food designations. Such designation is generally made by a commemorative resolution of a state legislature or proclamation of a governor. The designations are aimed at raising awareness of the association of a food item with a state and as a promotional tool; they do not have the force of law.

The following are official state foods:

125.2 List of Official State Foods

Alabama

- State fruit: Blackberry
- State nut: Pecan
- State tree fruit: Peach

Arkansas

- State fruit/vegetable: South Arkansas Vine Ripe Pink Tomato
- State grain: Rice

Florida

- State fruit: Orange
- State pie: Key lime pie

Georgia

- State fruit: Peach
- State prepared food: Grits
- State vegetable: Vidalia Sweet Onion

Idaho

- State food: Potato
- State fruit: Huckleberry

Illinois

- State fruit: Gold Rush Apple
- State snack food: Popcorn

Indiana

- State pie: Hoosier Pie (Sugar cream pie)

Kentucky

- State fruit: Blackberry

Louisiana

- State fruit: Strawberry
- State jellies: Mayhaw jelly and Louisiana sugar cane jelly
- State meat pie: Natchitoches meat pie
- State vegetable: Sweet potato

Maine

- State dessert: Blueberry pie made with wild Maine blueberries
- State fruit: Wild blueberry
- State soft drink: Moxie
- State treat: Whoopie pie

Maryland

- State dessert: Smith Island Cake
- State food: Blue crabs

Massachusetts

- State bean: Baked navy bean
- State cookie: Chocolate chip cookie
- State dessert: Boston cream pie
- State doughnut: Boston cream doughnut
- State fruit: Cranberry
- State muffin: Corn muffin

Minnesota

- State fruit: Honeycrisp apple
- State grain: Wild rice
- State muffin: Blueberry muffin
- State mushroom: Morel

Missouri

- State fruit: Norton Cynthiana grape
- State dessert: Ice cream cone

New Hampshire

- State fruit: Pumpkin

New Jersey

- State fruit: Highbush Blueberry
- State vegetable: Jersey Tomato

New Mexico

- State cookie: Bizcochito
- State vegetables: Chiles and Frijoles (refried beans)

New York

- State fruit: Apple
- State muffin: Apple muffin

North Carolina

- State berries: Blueberry and Strawberry
- State fruit: Scuppernong Grape
- State vegetable: Sweet potato

North Dakota

- State fruit: Chokecherry

Ohio

- State fruit: Tomato

Oklahoma

- State fruit: Strawberries
- State meals: Barbecued pork, Biscuits, Black-eyed peas, Chicken fried steak, Corn, Cornbread, Fried okra, Grits, Sausages and gravy, Squash
- State pie: Pecan pie
- State vegetable: Watermelon

Oregon

- State fruit: Pear
- State mushroom: Pacific Golden Chanterelle
- State nut: Hazelnut (Filbert)

Pennsylvania

- State cookie: Chocolate chip cookie

Rhode Island

- State fruit: Rhode Island Greening Apple

South Carolina

- State fruit: Peach
- State snack: Boiled peanuts

South Dakota

- State bread: Frybread
- State dessert: Kuchen

Tennessee

- State fruit: Tomato

Texas

- State bread: Pan de campo
- State dish: Chili con carne
- State fruit: Texas Red Grapefruit
- State health nut: Native pecan
- State native pepper: Chiltepin
- State pastries: Sopaipilla and Strudel
- State pepper: Jalapeño
- State snack: Tortilla chips and salsa
- State vegetable: Sweet onion

Utah

- State fruit: Cherry
- State historic vegetable: Sugar beet
- State snack: Jell-O
- State vegetable: Spanish sweet onion

Vermont

- State fruit: Apple
- State pie: Apple pie

Washington

- State fruit: Apple
- State vegetable: Walla Walla sweet onion

West Virginia

- State fruit: Golden Delicious apple

APPENDIX A

ACADEMIC PROGRAMS

Art Institutes, International Culinary Schools

(www.artinstitutes.edu/culinary-arts-3102.aspx) and

(www.artinstitutes.edu/culinary-management-3202.aspx)

- The Art Institute of Atlanta, 100 Embassy Row, 6600 Peachtree Dunwoody Road, Atlanta, GA 30328
- The Art Institute of Austin, 100 Farmers Circle, Austin, TX 78728
- The Art Institute of California Hollywood, 5250 Lankershim Boulevard, North Hollywood, CA 91601
- The Art Institute of California Inland Empire, 674 East Brier Drive, San Bernardino, CA 92408
- The Art Institute of California Los Angeles, 2900 31st Street, Santa Monica, CA 90405
- The Art Institute of California Orange County, 3601 West Sunflower Avenue, Santa Ana, CA 92704
- The Art Institute of California Sacramento, 2850 Gateway Oaks Drive, Suite #100, Sacramento, CA 95833
- The Art Institute of California San Diego, 7650 Mission Valley Road, San Diego, CA 92108
- The Art Institute of California San Francisco, 1170 Market Street, San Francisco, CA 94102
- The Art Institute of California Silicone Valley, 1120 Kifer Road, Sunnyvale, CA 94086
- The Art Institute of Charleston, 24 North Market Street, Charleston, SC 29401
- The Art Institute of Charlotte, 2110 Water Ridge Parkway, Charlotte, NC 28217
- The Art Institute of Colorado, 1200 Lincoln Street, Denver, CO 80203
- The Art Institute of Dallas, 8080 Park Lane, Suite 100, Dallas, TX 75231
- The Art Institute of Fort Lauderdale, 1799 S.E. 17th Street, Ft. Lauderdale, FL 33316
- The Art Institute of Houston, 1900 Yorktown Street, Houston, TX 77056
- The Art Institute of Indianapolis, 3500 Depauw Boulevard, Suite 1010, Indianapolis, IN 46268
- The Art Institute of Jacksonville, 8775 Baypine Road, Jacksonville, FL 32256
- The Art Institute of Las Vegas, 2350 Corporate Circle, Las Vegas, NV 89074
- The Art Institute of Michigan, 28125 Cabot Drive, Suite 120, Detroit, MI 48377
- The Art Institute of Ohio - Cincinnati, 8845 Governors Hill Drive, Cincinnati, OH 45249
- The Art Institute of Philadelphia, 1622 Chestnut Street, Philadelphia, PA 19103
- The Art Institute of Phoenix, 2233 West Dunlap Avenue, Phoenix, AZ 85021

- The Art Institute of Pittsburgh, 420 Boulevard of the Allies, Pittsburgh, PA 15219
- The Art Institute of Portland, 1122 N.W. Davis Street, Portland, OR 97209
- The Art Institute of Raleigh-Durham, 410 Blackwell Street, Suite 200, Durham, NC 27701
- The Art Institute of Salt Lake City, 121 West Election Road, Suite 100, Salt Lake City, UT 84020
- The Art Institute of San Antonio, 10000 IH-10 West, Suite 200, San Antonio, TX 78230
- The Art Institute of Seattle, 2323 Elliott Avenue, Seattle, WA 98121
- The Art Institute of St. Louis, 1520 South Fifth Street, Suite 107, St. Charles, MO 63303
- The Art Institute of Tampa, 4401 North Himes Avenue, Suite 150, Tampa, FL 33614
- The Art Institute of Tennessee - Nashville, 100 Centerview Drive, Suite 250, Nashville, TN 37214
- The Art Institute of Tucson, 5099 E. Grant Road, Suite 100, Tucson, AZ 85712
- The Art Institute of Virginia Beach, 4500 Main Street, Suite 100, Virginia Beach, VA 23462
- The Art Institute of Washington, 1820 North Fort Myer Drive, Arlington, VA 22209
- The Art Institute of Wisconsin, 320 East Buffalo Street, Suite 600, Milwaukee, WI 53202
- The Art Institutes International Kansas City, 8208 Melrose Drive, Kansas City, KS 66214
- The Art Institutes International Minnesota, 15 South 9th Street, Minneapolis, MN 55402
- The Illinois Institute of Art - Chicago, 350 N. Orleans Street, Chicago, IL 60654

Atlantic Cape Community College (<http://www.atlantic.edu/aca/index.htm>)

- Academy of Culinary Arts (Atlantic City), 1535 Bacharach Boulevard, Atlantic City, NJ 08401
- Academy of Culinary Arts (Cape May County), 341 Court House-South Dennis Road, Cape May Court House, NJ 08210
- Academy of Culinary Arts (Mays Landing), 5100 Black Horse Pike, Mays Landing, NJ 08330

Baker College (www.culinaryinstitutemi.com)

- Culinary Institute of Michigan, 1903 Marquette Avenue, Muskegon, MI 49442.

Baltimore International College (www.bic.edu/school-of-culinary-arts)

- School of Culinary Arts, 17 Commerce Street, Baltimore, MD 21202

City College of San Francisco

(www.ccsf.edu/Departments/Culinary_Arts-Hospitality_Studies/)

- Culinary Arts & Hospitality Studies, 50 Phelan Avenue, SW 156, San Francisco, CA 94112

- Culinary and Service Skills Training Program, 88 Fourth Street/Mission, San Francisco, CA 94103

Culinary Institute of America (www.ciachef.edu)

- Main Campus: 1946 Campus Drive, Hyde Park, NY 12538
- Greystone: 2555 Main Street, St. Helena, CA 94574
- San Antonio: 312 Pearl Parkway, Building 2, Suite 2102, San Antonio, TX 78215

Culinary Institute of Virginia (www.chefva.com)

- 2428 Almeda Avenue, Suite 106, Norfolk, VA 23513

Florida International University (www.fiu.edu)

- School of Hospitality & Tourism Management, Biscayne Bay Campus, 3000 N.E. 151st Street, North Miami, FL 33181

French Culinary Institute (www.frenchculinary.com)

- Main Campus: 462 Broadway, New York, NY 10013
- West Coast: 700 West Hamilton Avenue, Campbell, CA 95008

Institute of Culinary Education (www.iceculinary.edu)

- 50 West 23rd Street, New York, NY 10010

Johnson and Wales University (www.jwu.edu)

- Main Campus: 8 Abbott Park Place, Providence, RI 02903
- 801 West Trade Street, Charlotte, NC 28202
- 1701 NE 127th Street, North Miami, FL 33181
- 7150 Montview Boulevard, Denver, CO 80220

Keiser University, Center for Culinary Arts (www.keiseruniversity.edu/culinary/)

- 1700 Halstead Boulevard, Building 2, Tallahassee, FL 32309
- 900 S. Babcock Street, Melbourne, FL 32901
- 6151 Lake Osprey Drive, Sarasota, FL 34240

Kendall College (www.kendall.edu)

- School of Culinary Arts, 900 North Branch Street, Chicago, IL 60642

L'École Culinaire (www.lecoleculinaire.com)

- 9811 South Forty Drive, St. Louis, MO, 63124
- 1245 N. Germantown Parkway, Cordova, TN 38016

Le Cordon Bleu College of Culinary Arts (www.chefs.edu)

- Atlanta: 1927 Lakeside Parkway, Tucker, GA 30084
- Austin: 3110 Esperanza Crossing, Suite 100, Austin, TX 78758
- Boston: 215 First Street, Cambridge, MA 02142

- Chicago: 361 West Chestnut, Chicago, IL 60610
- Dallas: 11830 Webb Chapel Road, Suite 1200, Dallas, TX 75234
- Las Vegas: 1451 Center Crossing Road, Las Vegas, NV 89144
- Los Angeles: 530 East Colorado Boulevard, Pasadena, CA 91101
- Miami: 3221 Enterprise Way, Miramar, FL 33025
- Minneapolis/Saint Paul: 1315 Mendota Heights Road, Mendota Heights, MN 55120
- Orlando: 8511 Commodity Circle, Suite 100, Orlando, FL 32819
- Portland: 600 SW 10th Avenue Suite 500, Portland, OR 97205
- Sacramento: 2450 Del Paso Road, Sacramento, CA 95834
- San Francisco: California Culinary Academy, 350 Rhode Island Street, San Francisco, CA 94103
- Scottsdale: 8100 East Camelback Road, Suite 1001, Scottsdale, AZ 85251
- Seattle: 360 Corporate Drive North, Tukwila, WA 98188
- St. Louis: 7898 Veterans Memorial Parkway, St. Peters, MO 63376

Lincoln Culinary Institute (www.lincolnedu.com/schools/lincoln-culinary-institute)

- 85 Sigourney Street, Hartford, CT 06105
- 8 Progress Drive, Shelton, CT 06484
- 9325 Snowden River Parkway, Columbia, MD 21046
- 2410 Metrocentre Boulevard, West Palm Beach, FL 33407

Miami Culinary Institute (www.miamidadeculinary.com)

- Wolfson Campus, 415 NE 2nd Avenue, Suite 9104, Miami, FL 33132

Michigan State University (www.bus.msu.edu/shb/)

- School of Hospitality Business, 645 N. Shaw Lane, Room 232, East Lansing, MI 48824

Mitchell Technical Institute

(www.mitchelltech.edu/programs/ViewProgram.aspx?id=5&ContentID=9)

- Culinary Academy of South Dakota, 1800 E. Spruce Street, Mitchell, SD 57301

New England Culinary Institute (www.neci.edu)

- 56 College Street, Montpelier, VT 05602

Nicholls State University (www.nicholls.edu/culinary/)

- Chef John Folse Culinary Institute, 107 Gouaux Hall, P.O. Box 2099, Thibodaux, LA 70310

Oregon Coast Culinary Institute (www.occi.net)

- 1988 Newmark Avenue, Coos Bay, OR 97420

San Diego Culinary Institute (<http://sdci-inc.com/>)

- 8024 La Mesa Boulevard, La Mesa, CA 91941

Southwest Minnesota State University

(www.smsu.edu/academics/programs/culinology/Index.cfm)

- Culinary and Hospitality Management, 1501 State Street, Marshall, MN 56258.

Southwestern Oregon Community College

(www.socc.edu/academics/pgs/academic-dept/culinary/index.shtml)

- 1988 Newmark Avenue, Coos Bay, OR 97420

Stratford University (www.stratford.edu/culinary), Advanced Culinary Arts Program

- 210 S. Central Avenue, Baltimore, MD 21202
- 836 J. Clyde Morris Boulevard, Newport News, VA 23601
- 14349 Gideon Drive, Woodbridge, VA 22192
- 7777 Leesburg Pike, Falls Church, VA 22043
- 11104 W. Broad Street, Glen Allen, VA 23060

Sullivan University (www.sullivan.edu/nchs.asp)

- National Center For Hospitality Studies, 3101 Bardstown Road, Louisville, KY 40205

SUNY Oneonta (www.oneonta.edu/academics/huec/FSRA3.asp)

- Food Service and Restaurant Administration, Department of Human Ecology, Ravine Parkway, Oneonta, NY 13820.

University of Central Florida (<http://hospitality.ucf.edu/>)

- Rosen College of Hospitality Management, 9907 Universal Boulevard, Orlando, FL 32819

University of Houston (www.hrm.uh.edu)

- Conrad N. Hilton College of Hotel and Restaurant Management, 4800 Calhoun Road, Houston, TX 77004

University of Nevada, Las Vegas (www.unlv.edu/hotel/cam)

- William F. Harrah College of Hotel Administration, Food & Beverage Management Department, 4505 S. Maryland Parkway, Box 456022, Las Vegas, NV 89154.

University of New Haven (www.cthospitality.us)

- Hospitality and Tourism Management, 300 Boston Post Road, West Haven, CT 06516

University of Tennessee (<http://culinary.utk.edu/>)

- The Culinary Institute, 220B Jessie Harris Building, Knoxville, TN 37996

Walters State Community College (www.ws.edu/academics/business/culinary-arts)

- Department of Hospitality Business, 500 South Davy Crockett Parkway, Morristown, TN 37813

Walnut Hill College (www.walnuthillcollege.edu)

- The Restaurant School at Walnut Hill College, 4207 Walnut Street, Philadelphia, PA 19104

APPENDIX B

ANALYSTS & MARKET CONSULTANTS

AlixPartners, 300 N. LaSalle Drive, Suite 1900, Chicago, IL 60654. (312) 346-2500.
(www.alixpartners.com)

Baum + Whiteman, 912 President Street, Brooklyn, NY 11215. (718) 622-0200.
(www.baumwhiteman.com)

Beverage Marketing Corporation, 850 Third Avenue, 13th Floor, New York, NY 10022.
(212) 888-7640. (www.beveragemarketing.com)

Black Box Intelligence, 17304 Preston Road, Suite 430, Dallas, TX 75252.
(972) 364-0490. (www.blackboxintelligence.com)

CCD Innovation, 1201 Park Avenue, Suite 101, Emeryville, CA 94608. (415) 693-8900.
(www.ccdinnovation.com)

CFI Group, 625 Avis Drive, Ann Arbor, MI 48108. (734) 930-9090. (www.cfigroup.com)

Chain Store Guide, 10117 Princess Palm Avenue, Suite 375, Tampa, FL 33610.
(813) 627-6800. (www.csgris.com)

CHD Expert, 130 S. Jefferson Street, Suite 250, Chicago, IL, 60661. (312) 768-6900.
(www.chd-expert.com)

Consumer Edge Insight, 1 Landmark Square, 9th Floor, Stamford, CT 06901.
(203) 504-8122. (www.consumeredgeinsight.com)

Datassential, 156 N. Jefferson Street, Chicago, IL 60661. (312) 655-0622.
(www.datassential.com)

Empathica, 2121 Argentia Road, Suite 200, Mississauga, ON L5N 2X4, Canada.
(905) 542-9001. (www.empathica.com)

Environ International Corporation, 2200 Powell Street, Suite 700, Emeryville, CA 94608.
(510) 655-7400. (www.environcorp.com)

Experian Marketing Services, 1271 Avenue of the Americas, 45th Floor, New York, NY 10020. (866) 256-4468. (www.experian.com/marketing-services/marketing-services.html)

Federation of Dining Room Professionals, 1417 Sadler Road, #100, Fernandina Beach, FL 32034. (904) 491-6690. (www.fdrp.com)

GfK, 75 Ninth Avenue, 5th Floor, New York, NY 10011. (212) 240-5300. (www.gfk.com)

GfK MRI, 200 Liberty Street, 4th Floor, New York, NY 10281. (212) 884-9200. (www.gfkmri.com)

GuestMetrics Inc., 1602 Village Market Boulevard SE, Leesburg, VA 20175. (703) 297-3400. (www.guestmetrics.com)

Harris Interactive, 60 Corporate Woods, Rochester, NY 14623. (585) 272-8400. (www.harrisinteractive.com)

IRI, 150 North Clinton Street, Chicago, IL 60661. (312) 726-1221. (www.infores.com)

International Demographics, 10333 Richmond Avenue, Suite 200, Houston, TX 77042. (713) 626-0333. (www.themediiaaudit.com)

Malcolm M. Knapp Inc., 26 East 91st Street, New York, NY 10128. (212) 289-7782. (www.malcolmnknapp.com)

Market Force Information, Post Office Box 270355, Louisville, CO 80027. (303) 402-6920. (www.marketforce.com)

Mintel, 333 West Wacker Drive, Suite 1100, Chicago, IL 60606. (312) 932-0400. (www.mintel.com)

New Strategist Press, 26 Austin Avenue, P.O. Box 635, Amityville, NY 11701. (631) 608-8795. (www.newstrategist.com)

Packaged Facts, 11200 Rockville Pike, Suite 504, Rockville, MD 20852. (240) 747-3095. (www.packagedfacts.com)

Restaurant Marketing Group, 5421 S Helena Street, Centennial, CO 80015. (303) 521-1988. (www.rmktgroup.com)

Restaurant Research, LLC, 1 Cricklewood Road, Redding, CT 06896. (203) 938-4703. (www.restaurantresearch.info)

Revenue Management Solutions, 777 South Harbour Island Boulevard, Suite 890, Tampa, FL 33602. (813) 277-0034. (www.revenuemanage.com)

Richard K. Miller & Associates, 4132 Atlanta Highway, Suite 110, Loganville, GA 30052. (888) 928-7562. (www.rkma.com)

Sandelman & Associates, 257 La Paloma, Suite 1, San Clemente, CA 92672. (949) 388-5600. (www.sandelman.com)

Scarborough Research, 770 Broadway, New York, NY 10003. (646) 654-8400. (www.scarborough.com)

Service Management Group, 1737 McGee Street, Kansas City, MO 64108. (800) 764-0439. (www.smg.com)

Technomic, Inc., 300 South Riverside Plaza, Suite 1200, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)

The Beverage Information Group, 17 High Street, 2nd Floor, Norwalk, CT 06851. (203) 855-8499. (www.bevinfogroup.com)

The Gallup Organization, 901 F Street NW, Washington, DC 20004. (202) 715-3030. (www.gallup.com)

The Hartman Group, 3150 Richards Road, Suite 200, Bellevue, WA 98005. (425) 452-0818. (www.hartman-group.com)

The Kruse Company, 5636 River Oaks Place NW, Atlanta, GA 30327. (404) 256-0770. (no website)

The Media Audit, 10333 Richmond Avenue, Suite 200, Houston, TX 77042. (713) 626-0333. (www.themediiaaudit.com)

The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700. (www.npd.com)

WD Partners, 7007 Discovery Boulevard, Dublin, OH 43017. (614) 634-7000. (www.wdpartners.com)

Zagat Survey LLC, 76 9th Avenue, 4th Floor, New York, NY 10011. (212) 977-6000. (www.zagat.com)

APPENDIX C

ASSOCIATIONS

American Beverage Association, 1101 Sixteenth Street NW, Washington, DC 20036.
(202) 463-6732. (www.ameribev.org)

Beer Institute, 122 C Street NW, Suite 350, Washington, DC 20001. (202) 737-2337.
(www.beerinstitute.org)

Brewers Association, 736 Pearl Street, Boulder, CO 80302. (303) 447-0816.
(www.brewersassociation.org)

Distilled Spirits Council of the United States, 1250 Eye Street NW, Suite 400,
Washington, DC 20005. (202) 628-3544. (www.discus.org)

Food Marketing Institute, 2345 Crystal Drive, Suite 800, Arlington, VA 22202.
(202) 452-8444. (www.fmi.org)

International Bottled Water Association, 1700 Diagonal Road, Suite 650, Alexandria,
VA 22314. (703) 683-5213. (www.bottledwater.org)

International Dairy Foods Association, 1250 H Street NW, Suite 900, Washington, DC
20005. (202) 737-4332. (www.idfa.org)

National Association of Pizzeria Operators, 908 South 8th Street, Suite 200, Louisville,
KY 40203. (502) 736-9530. (www.napo.com)

National Coffee Association, 45 Broadway, Suite 1140, New York, NY 10006.
(212) 766-4007. (www.ncausa.org)

National Council of Chain Restaurants, division of the National Retail Federation,
325 7th Street NW, Suite 1100, Washington, DC 20004. (202) 783-7971.
(www.nccr.net)

National Restaurant Association, 2055 L Street NW, Suite 700, Washington, DC 20036.
(202) 331-5900. (www.restaurant.org)

Organic Trade Association, 28 Vernon Street, Suite 413, Brattleboro, VT 05301.
(802) 275-3800. (www.ota.com)

Research Chefs Association, 1100 Johnson Ferry Road, Suite 300, Atlanta, GA 30342.
(404) 252-3663. (www.culinology.com)

Society of Foodservice Management, 455 South 4th, Suite 650, Louisville, KY 40202.
(502) 574-9931. (www.sfm-online.org)

Specialty Coffee Association of America, 330 Golden Shore, Suite 50, Long Beach, CA 90802. (562) 624-4100. (www.scaa.org)

Tea Association of the USA, 362 5th Avenue, Suite 801, New York, NY 10001.
(212) 986-9415. (www.teausa.org)

Wine Institute, 425 Market Street, Suite 1000, San Francisco, CA 94105.
(415) 512-0151. (www.wineinstitute.org)

APPENDIX D

PERIODICALS

Beer Marketer's Insights, 49 East Maple Avenue, Suffern, NY 10901. (845) 507-0040. (www.beerinsights.com)

Beverage Digest, P.O. Box 621, Bedford Hills, NY 10507. (914) 244-0700. (www.beverage-digest.com)

Beverage Dynamics, 17 High Street, 2nd Floor, Norwalk, CT 06851. (203) 855-8499. (www.beveragenet.net)

Beverage World, 333 Seventh Avenue, 11th Floor, New York, NY 10001. (646) 708-7300. (www.beverageworld.com)

Cheers, 17 High Street, Norwalk, CT 06851. (203) 855-8499. (www.beveragenet.net)

Cornell Hospitality Quarterly, Cornell University, 185 Statler Hall, Ithaca, NY 14853. (607) 255-3025. (<http://cqx.sagepub.com/>)

Food Arts, M. Shanken Communications, 387 Park Avenue South, New York, NY 10016. (212) 684-4224. (www.mshanken.com/foodarts/)

FoodService Director, 1 Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181. (630) 574-5075. (www.fsdmag.com)

FSR: Ideas and Insights for Full-Service Restaurants, 4905 Pine Cone Drive, Suite 2, Durham, NC 27727. (919) 945-0713. (www.fsrmagazine.com)

Market Watch, M. Shanken Communications, 387 Park Avenue South, New York, NY 10016. (212) 684-4224. (www.mshanken.com/marketwatch/)

Nation's Restaurant News, 1166 Avenue of the Americas, 10th Floor, New York, NY 10036. (212) 204-4200. (www.nrn.com)

Pizza Today, National Association of Pizza Operators, 908 South 8th Street, Suite 200, Louisville, KY 40203. (502) 736-9500. (www.pizzatoday.com)

QSR: The Magazine of Quick Service Restaurant Success, 4905 Pine Cone Drive, Suite 2, Durham, NC 27727. (800) 662-4834. (www.qsrmagazine.com)

Restaurant Business, 1 Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181. (630) 574-5075. (www.restaurantbusinessonline.com)

Restaurant Finance Monitor, 2808 Anthony Lane South, Minneapolis, MN 55418. (612) 767-3200. (www.restfinance.com)

APPENDIX E

STATE RESTAURANT ASSOCIATIONS

Alabama

- Alabama Restaurant & Hospitality Alliance, 61B Market Place, Montgomery, AL 36117. (334) 244-1320. (www.alabamarestaurants.com/index2.cfm)

Alaska

- Alaska Cabaret, Hotel, Restaurant & Retailers Association, 1503 W. 31st Avenue, Suite 202, Anchorage, AK 99503. (907) 274-8133. (www.alaskacharr.com)

Arizona

- Arizona Restaurant Association, 4250 N. Drinkwater Boulevard, Suite 350, Scottsdale, AZ 85251. (602) 307-9134. and 465 W. St. Mary's Road, Suite 300, Tucson, AZ 85701. (520) 791-9106. (www.azrestaurant.org)

Arkansas

- Arkansas Hospitality Association, 603 South Pulaski Street, Little Rock, AR 72201. (501) 376-2323. (www.arhospitality.org)

California

- California Restaurant Association, 621 Capitol Mall, Suite 2000, Sacramento, CA 95814. (916) 447-5793. (www.calrest.org)

Colorado

- Colorado Restaurant Association, 430 E. 7th Avenue, Denver, CO 80203. (303) 830-2972. (www.coloradorestaurant.com)

Connecticut

- Connecticut Restaurant Association, 38 Hungerford Street, Hartford, CT 06106. (860) 278-8008. (www.ctrestaurant.org)

Delaware

- Delaware Restaurant Association, P.O. Box 8004, Newark, DE 19714. (302) 738-2545. (www.delawarerestaurant.org)

Florida

- Florida Restaurant & Lodging Association, 230 South Adams Street, Tallahassee, FL 32301. (850) 224-2250. (www.frla.org)

Georgia

- Georgia Restaurant Association, Piedmont Place, 3520 Piedmont Road, Suite 130, Atlanta, GA 30305. (404) 467-9000. (www.garestaurants.org)

Hawaii

- Hawaii Restaurant Association, 2909 Waiālae Avenue #22, Honolulu, HI 96826. (808) 944-9105. (www.hawaiirestaurant.org)

Idaho

- Idaho Lodging & Restaurant Association, P.O. Box 1822, Boise, ID 83701. (208) 342-0010. (www.idahohospitality.net)

Illinois

- Illinois Restaurant Association, 33 W. Monroe Street, Suite 250, Chicago, IL 60603. (312) 787-4000. (www.illinoisrestaurants.org)

Indiana

- Indiana Restaurant Association, 200 S. Meridian Street, Suite 350, Indianapolis, IN 46225. (317) 673-4211. (www.indianarestaurants.org)

Iowa

- Iowa Restaurant Association, 1501 42nd Street, Suite 294, West Des Moines, IA 50266. (515) 276-1454. (www.restaurantiowa.com)

Kansas

- Kansas Restaurant & Hospitality Association, 3500 N. Rock Road, Building 1300, Wichita, KS 67226. (316) 267-8383. (www.krha.org)

Kentucky

- Kentucky Restaurant Association, 133 Evergreen Road, Suite 201, Louisville, KY 40243. (502) 896-0464. (www.kyra.org)

Louisiana

- Louisiana Restaurant Association, 2700 N. Arnoult Road, Metairie, LA 70002. (504) 454-2277. (www.lra.org)

Maine

- Maine Restaurant Association, 45 Melville Street, Suite 2, Augusta, ME 04330. (207) 623-2178. (www.mainerestaurant.com)

Maryland

- Restaurant Association of Maryland, 6301 Hillside Court, Columbia, MD 21046. (410) 290-6800. (www.marylandrestaurants.com)

Massachusetts

- Massachusetts Restaurant Association, 333 Turnpike Road, Suite 102, Southborough, MA 01772. (508) 303-9905. (www.massrestaurantassoc.org)

Michigan

- Michigan Restaurant Association, 225 W. Washtenaw Street, Lansing, MI 48933. (517) 482-5244. (www.michiganrestaurant.org)

Minnesota

- Minnesota Restaurant Association, 305 East Roselawn Avenue, Saint Paul, MN 55117. (651) 778-2400. (www.hospitalitymn.org)

Mississippi

- Mississippi Hospitality & Restaurant Association, 130 Riverview Drive, Suite C, Flowood, MS 39232. (601) 420-4210. (www.msra.org)

Missouri

- Missouri Restaurant Association, 1810 Craig Road, Suite 225, St. Louis, MO 63146. (314) 576-2777. (www.morerestaurants.org)

Montana

- Montana Restaurant Association, 1645 Parkhill Drive, Suite 6, Billings, MT 59102. (406) 256-1005. (www.mtrestaurant.com)

Nebraska

- Nebraska Restaurant Association & Hospitality Education Foundation, 1610 S. 70th Street, Suite 101, Lincoln, NE 68506. (402) 488-3999. (www.nebraska-dining.org)

Nevada

- Nevada Restaurant Association, 1500 E. Tropicana Avenue, Suite 114-A, Las Vegas, NV 89119. (702) 878-2313. (www.nvrestaurants.com)

New Hampshire

- New Hampshire Lodging & Restaurant Association, 341 Loudon Road., Unit 3, P.O. Box 1175, Concord, NH 03302. (603) 228-9585. (www.nhlra.com)

New Jersey

- New Jersey Restaurant Association, 126 W. State Street, Trenton, NJ 08608. (609) 599-3316. (www.njra.org)

New Mexico

- New Mexico Restaurant Association, 9201 Montgomery Boulevard NE, Suite 602, Albuquerque, NM 87111. (505) 343-9848. (www.nmrestaurants.org)

New York

- New York State Restaurant Association, 409 New Karner Road, Suite 202, Albany, NY 12205. (518) 452-4222. (www.nysra.org)

North Carolina

- North Carolina Restaurant and Lodging Association, 6036 Six Forks Road, Raleigh, NC 27609. (919) 844-0098. (www.ncrla.biz)

North Dakota

- North Dakota Hospitality Association, P.O. Box 428, Bismarck, ND 58502. (701) 223-3313. (www.ndhospitality.com)

Ohio

- The Ohio Restaurant Association, 1525 Bethel Road, Suite 201, Columbus, OH 43220. (614) 442-3535. (www.ohiorestaurant.org)

Oklahoma

- Oklahoma Restaurant Association, 3800 N. Portland Avenue, OK City, OK 73112. (405) 942-8181. (www.okrestaurants.com)

Oregon

- Oregon Restaurant & Lodging Association, 8565 SW Salish Lane, Suite 120, Wilsonville, OR 97070. (503) 682-4422. (www.oregonrla.org)

Pennsylvania

- Pennsylvania Restaurant & Lodging Association, 100 State Street, Harrisburg, PA 17101. (717) 232-4433. (www.parestaurant.org)

Rhode Island

- Rhode Island Hospitality Association, 94 Sabra Street, Cranston, RI 02910. (401) 223-1120. (www.rihospitality.org)

South Carolina

- South Carolina Restaurant and Lodging Association, P.O. Box 7577, Columbia, SC 29202. (803) 765-9000. (www.schospitality.org)

South Dakota

- South Dakota Retailers Association Restaurant Division, 320 E. Capitol, P.O. Box 638, Pierre, SD 57501. (605) 224-5050. (www.sdra.org)

Tennessee

- Tennessee Hospitality Association, 475 Craighead Street, Nashville, TN 37204. (615) 385-9970. (www.tnhospitality.net)

Texas

- Texas Restaurant Association, P.O. Box 1429, Austin, TX 78767. (512) 457-4100. (www.restaurantville.com)

Utah

- Utah Restaurant Association, 5645 Waterbury Way, Suite D203, Salt Lake City, UT 84121. (801) 274-7309. (www.utahdineout.com)

Vermont

- Vermont Chamber of Commerce, Hospitality Division, P.O. Box 37, Montpelier, VT 05601. (802) 223-3443. (www.vtchamber.com)

Virginia

- Virginia Hospitality & Travel Association, 2101 Libbie Avenue, Richmond, VA 23230. (804) 288-3065. (www.vhta.org)

Washington

- Washington Restaurant Association, 510 Plum Street SE, Suite 200, Olympia, WA 98501. (360) 956-7279. (www.wrahome.com)

West Virginia

- West Virginia Hospitality & Travel Association, P.O. Box 2391, Charleston, WV 25328. (304) 342-6511. (www.wvhta.com)

Wisconsin

- Wisconsin Restaurant Association, 2801 Fish Hatchery Road, Madison, WI 53713. (608) 270-9950. (www.wirerestaurant.org)

Wyoming

- Wyoming Lodging and Restaurant Association, P.O. Box 1003, Cheyenne, WY 82003. (307) 634-8816. (www.wlra.org)

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