Restaurant, Food & Beverage Market Research Handbook 2016-2017

Richard K. Miller & Associates
since 1972
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<td>Relaxation Beverages</td>
</tr>
<tr>
<td>84.6</td>
<td>Drinkable Meals</td>
</tr>
<tr>
<td>85</td>
<td>JUICE &amp; FRUIT DRINKS</td>
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<td>85.2</td>
<td>Market Assessment</td>
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<td>85.3</td>
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<td>85.4</td>
<td>RTD Juice and Smoothies</td>
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<td>86.1</td>
<td>Consumption</td>
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<td>At-Home Consumption</td>
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<td>86.4</td>
<td>RTD Coffee</td>
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<td>86.5</td>
<td>Coffeeshops</td>
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<td>Title</td>
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<td>93</td>
<td>CONSUMERS’ CHOICE AWARDS</td>
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<tr>
<td>93.1</td>
<td>Overview</td>
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<td>93.2</td>
<td>Award Winners 2015</td>
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<td>94</td>
<td>DINERS’ CHOICE AWARDS</td>
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<tr>
<td>94.1</td>
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<tr>
<td>94.2</td>
<td>Best Restaurant</td>
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<tr>
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<td>Other Categories</td>
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<td>Market Resources</td>
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<td>95</td>
<td>DISTINGUISHED RESTAURANTS</td>
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<tr>
<td>95.1</td>
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<tr>
<td>95.2</td>
<td>List Of Distinguished Restaurants</td>
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<td>95.3</td>
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<td>96</td>
<td>FINE-DINING HALL OF FAME</td>
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<td>96.1</td>
<td>List Of Inductees</td>
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<td>97</td>
<td>FIVE-DIAMOND AWARDS</td>
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<td>97.1</td>
<td>Overview</td>
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<td>97.2</td>
<td>Five-Diamond Award Winners</td>
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<td>FIVE-STAR AWARDS</td>
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<td>98.1</td>
<td>Award Winners</td>
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<tr>
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<td>FOOD &amp; WINE’S BEST NEW CHEFS</td>
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<tr>
<td>99.1</td>
<td>Overview</td>
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<tr>
<td>99.2</td>
<td>Award Winners 2015</td>
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<tr>
<td>99.3</td>
<td>Recent Award Winners</td>
</tr>
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<td>100</td>
<td>GREAT PIZZA RESTAURANTS</td>
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<td>Overview</td>
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<td>100.2</td>
<td>List Of Recognitions 2015</td>
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<td>101</td>
<td>GREAT SEAFOOD RESTAURANTS</td>
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<tr>
<td>101.1</td>
<td>Overview</td>
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<td>101.2</td>
<td>List Of Recognitions 2015</td>
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<td>102</td>
<td>GREAT STEAK HOUSES</td>
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<tr>
<td>102.1</td>
<td>Overview</td>
</tr>
<tr>
<td>102.2</td>
<td>List Of Recognitions 2015</td>
</tr>
</tbody>
</table>
PART I: MARKET OVERVIEW
1

RESTAURANT SALES

1.1 Overview
The U.S. Census Bureau (www.census.gov) publishes estimates of monthly restaurant sales (www.census.gov/retail/index.html). Sales estimates are presented for all food services and drinking places (NAICS Code 722) and three sub categories, as follows: full-service restaurants (NAICS Code 7221), limited-service restaurants (NAICS Code 7222), and drinking places (NAICS Code 7224).

1.2 Total Sales
Sales for all food services and drinking places have been as follows:
• 2006: $422.8 billion
• 2007: $444.6 billion
• 2008: $456.4 billion
• 2009: $452.4 billion
• 2010: $467.5 billion
• 2011: $495.8 billion
• 2012: $524.9 billion
• 2013: $542.7 billion
• 2014: $576.1 billion
• 2015: $622.6 billion

1.3 Full-Service Restaurant Sales
Sales for full-service restaurants have been as follows:
• 2006: $186.1 billion
• 2007: $195.5 billion
• 2008: $197.1 billion
• 2009: $194.0 billion
• 2010: $198.9 billion
• 2011: $214.1 billion
• 2012: $227.6 billion
• 2013: $234.8 billion
• 2014: $252.1 billion
• 2015: $274.3 billion
1.4 Limited-Service Restaurant Sales

Sales for limited-service restaurants have been as follows:

- 2006: $178.2 billion
- 2007: $186.0 billion
- 2008: $194.1 billion
- 2009: $195.0 billion
- 2010: $203.5 billion
- 2011: $214.3 billion
- 2012: $226.1 billion
- 2013: $235.9 billion
- 2014: $248.0 billion
- 2015: $268.7 billion

1.5 Bar and Night Club Sales

Sales for drinking places have been as follows:

- 2006: $19.3 billion
- 2007: $19.9 billion
- 2008: $20.2 billion
- 2009: $20.0 billion
- 2010: $20.2 billion
- 2011: $20.6 billion
- 2012: $21.5 billion
- 2013: $21.5 billion
- 2014: $22.2 billion
- 2015: $23.1 billion

1.6 Sales By Month

In 2015, monthly sales for all food services and drinking places were as follows:

- January: $42.6 billion
- February: $42.5 billion
- March: $49.0 billion
- April: $47.3 billion
- May: $50.6 billion
- June: $47.5 billion
- July: $48.3 billion
- August: $49.7 billion
- September: $46.6 billion
- October: $49.6 billion
- November: $47.1 billion
- December: $50.3 billion
MARKET SUMMARY

2.1 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 14.0 million people.

2.2 Industry Sales
According to the National Restaurant Association (www.restaurant.org), total restaurant industry sales were an estimated $709.2 billion in 2015, an increase of 3.8% from the previous year. Distribution of sales for 2015 was as follows:

COMMERCIAL RESTAURANT SERVICES
• Restaurants: $471.1 billion
• Retail, vending, recreation, mobile, and other: $ 70.2 billion
• Managed services: $ 49.5 billion
• Hotel restaurants: $ 36.3 billion
• Bars and taverns: $ 20.6 billion
• Total: $648.0 billion

NONCOMMERCIAL RESTAURANT SERVICES
• Total: $ 58.5 billion

MILITARY RESTAURANT SERVICES
• Total: $ 2.7 billion

Sales at full-service, or table-service, restaurants are an estimated $219.7 billion in 2015, an increase of 2.9% over 2014 and a real growth rate of 0.6%. Sales at quick-service restaurants and fast casual are an estimated $201.1 billion in 2015, an increase of 4.3% over 2014 and a real growth rate of 2.1%.

The National Restaurant Association estimated food and beverage sales for restaurant and foodservice segments in 2015 as follows (change from 2014 in parenthesis):

EATING AND DRINKING PLACES
• Full-service restaurants: $219.7 billion (2.9%)
• Quick-service restaurants: $201.1 billion (4.3%)
• Snack and nonalcoholic beverage bars: $32.9 billion (5.2%)
• Bars and taverns: $20.6 billion (3.1%)
• Social caterers: $9.1 billion (5.1%)
• Cafeterias, grill-buffets, and buffets: $8.3 billion (-1.1%)
• Total: $491.6 billion (3.6%)

RETAIL AND LODGING
• Retail-host restaurants: $40.6 billion (5.7%)
• Hotel/accommodation restaurants: $36.7 billion (4.5%)
• Recreation and sports (cinemas, bowling lanes, recreation, sport centers): $15.5 billion (4.4%)
• Vending and non-store retailers: $13.3 billion (3.6%)
• Mobile caterers: $764 million (5.3%)
• Total: $113.8 billion (5.1%)

FOODSERVICE CONTRACTOR-MANAGED SERVICES
• Colleges and universities: $16.0 billion (3.6%)
• Manufacturing and industrial plants: $8.3 billion (4.6%)
• Primary and secondary schools: $6.8 billion (3.9%)
• Recreation and sports centers: $6.8 billion (5.2%)
• Hospitals and nursing homes: $6.1 billion (4.8%)
• Commercial and office buildings: $3.0 billion (2.9%)
• In-transit foodservice (airlines): $2.5 billion (4.0%)
• Total: $49.5 billion (4.1%)

NONCOMMERCIAL RESTAURANT SERVICES
(Businesses, educational, governmental, or institutional organizations which operate their own restaurant services)
• Hospitals: $18.0 billion (4.4%)
• Recreation and sports centers: $10.0 billion (3.6%)
• Nursing homes: $9.0 billion (3.7%)
• Colleges and universities: $8.0 billion (2.7%)
• Primary and secondary schools: $7.1 billion (2.0%)
• Community centers: $3.5 billion (4.9%)
• Transportation: $2.6 billion (5.2%)
• Employee restaurant services: $460 million (3.3%)
• Total: $58.5 billion (3.7%)

MILITARY RESTAURANT SERVICES
• Officer and NCO clubs (open mess): $1.8 billion (3.9%)
• Military exchanges: $829 million (2.7%)
• Total: $2.6 billion (3.5%)
2.3 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%

2.4 Restaurant Sales Growth

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Current Dollar Growth</th>
<th>Real (Inflation-Adjusted) Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>5.5%</td>
<td>3.0%</td>
</tr>
<tr>
<td>2001</td>
<td>4.6%</td>
<td>0.8%</td>
</tr>
<tr>
<td>2002</td>
<td>5.3%</td>
<td>1.2%</td>
</tr>
<tr>
<td>2003</td>
<td>4.5%</td>
<td>2.1%</td>
</tr>
<tr>
<td>2004</td>
<td>6.2%</td>
<td>3.0%</td>
</tr>
<tr>
<td>2005</td>
<td>5.3%</td>
<td>2.2%</td>
</tr>
<tr>
<td>2006</td>
<td>4.7%</td>
<td>1.6%</td>
</tr>
<tr>
<td>2007</td>
<td>4.8%</td>
<td>1.0%</td>
</tr>
<tr>
<td>2008</td>
<td>3.5%</td>
<td>-0.9%</td>
</tr>
<tr>
<td>2009</td>
<td>-0.4%</td>
<td>-2.8%</td>
</tr>
<tr>
<td>2010</td>
<td>3.0%</td>
<td>0.5%</td>
</tr>
<tr>
<td>2011</td>
<td>4.1%</td>
<td>1.6%</td>
</tr>
<tr>
<td>2012</td>
<td>4.2%</td>
<td>1.3%</td>
</tr>
<tr>
<td>2013</td>
<td>3.8%</td>
<td>0.8%</td>
</tr>
<tr>
<td>2014</td>
<td>3.6%</td>
<td>1.2%</td>
</tr>
<tr>
<td>2015</td>
<td>3.8%</td>
<td>1.5%</td>
</tr>
</tbody>
</table>

2.5 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%
2.6 **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).

Figure 2.1 shows the RPI since 2004.

2.7 **Market Resources**

National Restaurant Association, 2055 L Street NW, Suite 700, Washington, DC 20036. (202) 331-5900. (www.restaurant.org)
Values Greater than 100 = Expansion; Values Less than 100 = Contraction

Figure 2.1. Restaurant Performance Index. (Source: National Restaurant Association)
3.1 Overview
The NPD Group (www.npd.com) conducts a count of U.S. commercial restaurant locations in the spring and fall each year through its ReCount® service.

3.2 Restaurant Counts
The restaurant counts from the fall ReCount surveys 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: 635,033
- 2014: 630,964
- 2015: 630,511

The distribution of restaurants by type of service was as follows:
- Quick-service and fast-casual: 52.8%
- Full-service (including casual-dining, midscale/family-dining, and fine-dining): 47.2%

The restaurant count peaked at 637,548 in spring 2014, then declined 1.1% in 2015.

3.3 Unit Count Changes By Category
The 2015 ReCount reported restaurants by ownership as follows (change from 2014 in parenthesis):
- Independent: 340,135 (-3%)
- Chains: 288,585 (1%)
Fast-casual chain units increased by 7% in 2015. Full-service independent units were down 3% while the quick-service restaurant count remained the same. 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.

“It’s a rough road for independent restaurants particularly in a down or even ‘soft’ economic climate. Independent operators do not have the resources of a chain to sustain themselves in slower times.”

Greg Starzynski
Director, Product Management
The NPD Group, 8/3/15

3.4 Growth In Metro Areas

In March 2015, The NPD Group reported the metropolitan areas with the highest percentage increase in restaurant units as follows:

<table>
<thead>
<tr>
<th>No. of Units</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Las Vegas-Paradise, NV:</td>
<td>4,469</td>
</tr>
<tr>
<td>Fort Myers-Cape Coral, FL:</td>
<td>1,372</td>
</tr>
<tr>
<td>San Jose-Sunnyvale-Santa Clara, CA:</td>
<td>4,003</td>
</tr>
<tr>
<td>Boise City-Nampa, ID:</td>
<td>1,176</td>
</tr>
<tr>
<td>Madison, WI:</td>
<td>1,247</td>
</tr>
</tbody>
</table>

3.5 Market Resources

The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700. (www.npd.com)
4

RESTAURANT VISITS

4.1 Overview
The NPD Group (www.npd.com) monitors the U.S. restaurant sector through its CREST® service, which tracks how consumers use restaurant and foodservice outlets. NPD also monitors weekly sales at 52 quick-service, fast-casual, and mid-scale chains through its SalesTrack® service.

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Visits</th>
<th>Visits Per Capita</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>59 billion</td>
<td>206</td>
</tr>
<tr>
<td>2010</td>
<td>60 billion</td>
<td>197</td>
</tr>
<tr>
<td>2011</td>
<td>61 billion</td>
<td>196</td>
</tr>
<tr>
<td>2012</td>
<td>61 billion</td>
<td>195</td>
</tr>
<tr>
<td>2013</td>
<td>61 billion</td>
<td>195</td>
</tr>
<tr>
<td>2014</td>
<td>61 billion</td>
<td>193</td>
</tr>
<tr>
<td>2015</td>
<td>61 billion</td>
<td>190</td>
</tr>
</tbody>
</table>

“Annual per capita foodservice visits are at 190, which is down 3 visits per person per year from 2013. Young adults are typically the heaviest restaurant users, but since the Great Recession Millennials have cut back dramatically on their visits to and spending at restaurants. Adults, ages 25-to-34, who are more likely to have families, have cut back the most on restaurant visits, making 50 fewer visits per person per year over the past several years. Additionally, the youngest adults, ages 18-to-24, make 33 fewer visits per person per year than they made in 2007.”

The NPD Group, 6/3/15
4.3 Restaurant Versus At-Home Meals
The share of consumer dollars spent on food at home compared to food away from home has been close to 50/50 for several years.
Four out of five meals are prepared and consumed at home and in-home meals have been on the rise for several years.
In 2014 (most recent data available), the average cost of a restaurant meal per person was $6.96; the estimated per person average cost for an in-home prepared meal was $2.31.

“It’s a battle for share within the foodservice industry and a battle for food dollars between in-home and away-from-home dining. The foodservice industry remains challenged to get people out of their homes to eat versus eating at home.”

The NPD Group, 6/3/15

4.4 Dine-In Versus Take-Out
Dine-in visits account for 39% of restaurant sector traffic, compared with take-out occasions, which account for 61% of traffic. Dine-in visits represent $223.4 billion dollars annually for the restaurant industry; off-premises visits represent $200.3 billion.

On-premise dining occasions are on the rise. The NPD Group reports changes in share of restaurant traffic has been as follows:

<table>
<thead>
<tr>
<th></th>
<th>Off-Premise</th>
<th>On-Premise</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010:</td>
<td>no change</td>
<td>-1%</td>
</tr>
<tr>
<td>2011:</td>
<td>2%</td>
<td>-3%</td>
</tr>
<tr>
<td>2012:</td>
<td>no change</td>
<td>1%</td>
</tr>
<tr>
<td>2013:</td>
<td>-1%</td>
<td>1%</td>
</tr>
<tr>
<td>2014:</td>
<td>-1%</td>
<td>2%</td>
</tr>
</tbody>
</table>
“More customers are sitting down and eating their meal in the restaurant than are carrying it out or using the drive-thru. Consumers believe the top benefits to dining on-premises involve the experience and how good it makes them feel. This is good news for the restaurant industry since an on-premises visit means a higher average check size than an off-premises visit.”

The NPD Group, 7/7/15

4.5 Quick-Service and Full-Service Restaurant Visits
Quick service restaurants, which represent 78.5% of total industry traffic, increased dine-in visits by 5% for the 12-month period ending May 2015, according to The NPD Group. This was the highest gain among all restaurant segments. Casual dining on-premises traffic held steady while overall visits declined for the segment. Dine-in visits at family dining/mid-scale restaurants declined as did overall visits.

4.6 Other Assessments
Restaurant traffic by daypart is assessed in Chapter 19 of this handbook. Restaurant traffic at casual restaurants is accessed in Chapter 25. Restaurant visits by age demographic are assessed in Section 11.1. Restaurant visits with children are assessed in Chapter 12.

4.7 Market Resources
The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700. (www.npd.com)
5

STATE-BY-STATE ANALYSIS

5.1 Restaurant Sales By State

The National Restaurant Association (www.restaurant.org) estimates restaurant sales in 2015 for each state as follows (change from 2014 in parenthesis):

- **Alabama**: $6.80 billion (3.1%)
- **Alaska**: $1.39 billion (3.2%)
- **Arizona**: $11.50 billion (4.9%)
- **Arkansas**: $3.70 billion (3.2%)
- **California**: $72.34 billion (3.9%)
- **Colorado**: $10.22 billion (4.3%)
- **Connecticut**: $6.39 billion (2.9%)
- **Delaware**: $1.75 billion (3.6%)
- **District of Columbia**: $2.83 billion (2.9%)
- **Florida**: $36.35 billion (4.9%)
- **Georgia**: $17.11 billion (3.8%)
- **Hawaii**: $3.96 billion (3.6%)
- **Idaho**: $2.07 billion (3.7%)
- **Illinois**: $23.02 billion (3.1%)
- **Indiana**: $9.77 billion (3.4%)
- **Iowa**: $3.64 billion (2.8%)
- **Kansas**: $4.06 billion (3.2%)
- **Kentucky**: $6.65 billion (3.5%)
- **Louisiana**: $7.27 billion (3.6%)
- **Maine**: $2.09 billion (2.4%)
- **Maryland**: $10.90 billion (3.2%)
- **Massachusetts**: $13.84 billion (3.0%)
- **Michigan**: $13.88 billion (3.2%)
- **Minnesota**: $8.68 billion (2.7%)
- **Mississippi**: $3.61 billion (3.0%)
- **Missouri**: $9.62 billion (2.9%)
- **Montana**: $1.56 billion (3.8%)
- **Nebraska**: $2.58 billion (2.8%)
- **Nevada**: $6.17 billion (3.8%)
- **New Hampshire**: $2.47 billion (2.8%)
- **New Jersey**: $15.03 billion (3.2%)
- **New Mexico**: $3.34 billion (3.6%)
• New York: $35.83 billion (3.6%)
• North Carolina: $16.50 billion (3.7%)
• North Dakota: $927 million (4.8%)
• Ohio: $18.28 billion (2.7%)
• Oklahoma: $5.46 billion (3.5%)
• Oregon: $6.94 billion (3.6%)
• Pennsylvania: $18.79 billion (2.9%)
• Rhode Island: $2.02 billion (2.3%)
• South Carolina: $8.01 billion (3.6%)
• South Dakota: $1.13 billion (3.1%)
• Tennessee: $10.46 billion (3.4%)
• Texas: $44.53 billion (4.8%)
• Utah: $3.76 billion (3.9%)
• Vermont: $892 million (2.2%)
• Virginia: $14.78 billion (3.3%)
• Washington: $11.59 billion (3.6%)
• West Virginia: $2.26 billion (2.6%)
• Wisconsin: $7.77 billion (3.4%)
• Wyoming: $903 million (3.5%)

5.2 Restaurant Locations By State
According to the National Restaurant Association, the number of restaurants by state are 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
5.3 Foodservice Employment By State

According to the 2015 Restaurant Industry Forecast, by the National Restaurant Association, roughly 14.0 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 2025.

Current restaurant employment and the projected average annual increase through 2025 are as follows:

<table>
<thead>
<tr>
<th>State</th>
<th>Employment</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama</td>
<td>181,700</td>
<td>1.4%</td>
</tr>
<tr>
<td>Alaska</td>
<td>29,200</td>
<td>1.5%</td>
</tr>
<tr>
<td>Arizona</td>
<td>273,200</td>
<td>2.2%</td>
</tr>
</tbody>
</table>

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
<table>
<thead>
<tr>
<th>State</th>
<th>Population</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arkansas</td>
<td>116,800</td>
<td>1.4%</td>
</tr>
<tr>
<td>California</td>
<td>1,603,500</td>
<td>1.0%</td>
</tr>
<tr>
<td>Colorado</td>
<td>264,200</td>
<td>1.5%</td>
</tr>
<tr>
<td>Connecticut</td>
<td>159,500</td>
<td>0.6%</td>
</tr>
<tr>
<td>Delaware</td>
<td>45,600</td>
<td>1.4%</td>
</tr>
<tr>
<td>District of Columbia</td>
<td>60,000</td>
<td>0.7%</td>
</tr>
<tr>
<td>Florida</td>
<td>943,600</td>
<td>2.0%</td>
</tr>
<tr>
<td>Georgia</td>
<td>421,800</td>
<td>1.9%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>88,700</td>
<td>0.7%</td>
</tr>
<tr>
<td>Idaho</td>
<td>63,300</td>
<td>1.2%</td>
</tr>
<tr>
<td>Illinois</td>
<td>529,200</td>
<td>0.7%</td>
</tr>
<tr>
<td>Indiana</td>
<td>312,200</td>
<td>0.9%</td>
</tr>
<tr>
<td>Iowa</td>
<td>145,400</td>
<td>0.8%</td>
</tr>
<tr>
<td>Kansas</td>
<td>133,300</td>
<td>0.9%</td>
</tr>
<tr>
<td>Kentucky</td>
<td>196,800</td>
<td>0.8%</td>
</tr>
<tr>
<td>Louisiana</td>
<td>203,100</td>
<td>0.8%</td>
</tr>
<tr>
<td>Maine</td>
<td>64,100</td>
<td>0.8%</td>
</tr>
<tr>
<td>Maryland</td>
<td>246,100</td>
<td>0.7%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>330,600</td>
<td>0.6%</td>
</tr>
<tr>
<td>Michigan</td>
<td>415,500</td>
<td>0.9%</td>
</tr>
<tr>
<td>Minnesota</td>
<td>265,700</td>
<td>0.7%</td>
</tr>
<tr>
<td>Mississippi</td>
<td>117,800</td>
<td>0.8%</td>
</tr>
<tr>
<td>Missouri</td>
<td>294,800</td>
<td>0.7%</td>
</tr>
<tr>
<td>Montana</td>
<td>53,200</td>
<td>0.7%</td>
</tr>
<tr>
<td>Nebraska</td>
<td>91,900</td>
<td>0.7%</td>
</tr>
<tr>
<td>Nevada</td>
<td>198,900</td>
<td>1.2%</td>
</tr>
<tr>
<td>New Hampshire</td>
<td>65,300</td>
<td>0.8%</td>
</tr>
<tr>
<td>New Jersey</td>
<td>318,800</td>
<td>0.5%</td>
</tr>
<tr>
<td>New Mexico</td>
<td>87,000</td>
<td>1.1%</td>
</tr>
<tr>
<td>New York</td>
<td>796,000</td>
<td>0.7%</td>
</tr>
<tr>
<td>North Carolina</td>
<td>436,600</td>
<td>1.9%</td>
</tr>
<tr>
<td>North Dakota</td>
<td>40,900</td>
<td>0.9%</td>
</tr>
<tr>
<td>Ohio</td>
<td>557,200</td>
<td>0.7%</td>
</tr>
<tr>
<td>Oklahoma</td>
<td>172,000</td>
<td>1.3%</td>
</tr>
<tr>
<td>Oregon</td>
<td>183,500</td>
<td>1.4%</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>557,100</td>
<td>0.4%</td>
</tr>
<tr>
<td>Rhode Island</td>
<td>53,100</td>
<td>0.6%</td>
</tr>
<tr>
<td>South Carolina</td>
<td>213,100</td>
<td>1.7%</td>
</tr>
<tr>
<td>South Dakota</td>
<td>44,900</td>
<td>1.1%</td>
</tr>
<tr>
<td>Tennessee</td>
<td>291,400</td>
<td>1.0%</td>
</tr>
<tr>
<td>Texas</td>
<td>1,182,900</td>
<td>2.0%</td>
</tr>
<tr>
<td>Utah</td>
<td>110,900</td>
<td>1.9%</td>
</tr>
<tr>
<td>Vermont</td>
<td>26,400</td>
<td>0.6%</td>
</tr>
<tr>
<td>Virginia</td>
<td>358,500</td>
<td>1.0%</td>
</tr>
<tr>
<td>State</td>
<td>Population</td>
<td>Percentage</td>
</tr>
<tr>
<td>---------------</td>
<td>------------</td>
<td>------------</td>
</tr>
<tr>
<td>Washington</td>
<td>286,800</td>
<td>1.3%</td>
</tr>
<tr>
<td>West Virginia</td>
<td>76,700</td>
<td>0.4%</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>267,600</td>
<td>0.6%</td>
</tr>
<tr>
<td>Wyoming</td>
<td>28,000</td>
<td>0.6%</td>
</tr>
</tbody>
</table>
6

REGIONAL TRENDS

6.1 Overview

The National Restaurant Association (www.restaurant.org) conducts the monthly Restaurant Industry Tracking Survey asking restauranteurs to compare current same-store sales and customer traffic with twelve months prior. The survey also asks about sales expectations for the next six months.

The Restaurant Industry Tracking Survey presents survey findings for 10 regions and select states, as follows:

• New England Region: CT, ME, MA, NH, RI, VT
• Middle Atlantic Region: NJ, NY, PA
• Upper South Atlantic Region: DE, DC, MD, VA, WV
• Lower South Atlantic Region: FL, GA, NC, SC
• East North Central Region: IL, IN, MI, OH, WI
• East South Central Region: AL, KY, MS, TN
• West North Central Region: IA, KS, MN, MO, NE, ND, SD
• West South Central Region: AR, LA, OK, TX
• Mountain Region: AZ, CO, ID, MT, NV, NM, UT, WY
• Pacific Region: AK, CA, HI, OR, WA

This chapter presents the Restaurant Industry Tracking Survey for December 2015.

6.2 Restaurant Sales

Same-store sales compared with one year prior were assessed as follows:

<table>
<thead>
<tr>
<th>Region</th>
<th>Higher</th>
<th>Lower</th>
<th>Same</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>44%</td>
<td>33%</td>
<td>24%</td>
</tr>
<tr>
<td>New England Region</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Middle Atlantic Region</td>
<td>25%</td>
<td>50%</td>
<td>25%</td>
</tr>
<tr>
<td>Upper South Atlantic Region</td>
<td>20%</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Lower South Atlantic Region</td>
<td>25%</td>
<td>25%</td>
<td>50%</td>
</tr>
<tr>
<td>East North Central Region</td>
<td>50%</td>
<td>27%</td>
<td>23%</td>
</tr>
<tr>
<td>East South Central Region</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>West North Central Region</td>
<td>43%</td>
<td>14%</td>
<td>43%</td>
</tr>
<tr>
<td>West South Central Region</td>
<td>50%</td>
<td>50%</td>
<td>0%</td>
</tr>
<tr>
<td>Mountain Region</td>
<td>25%</td>
<td>58%</td>
<td>33%</td>
</tr>
</tbody>
</table>
### 6.3 Restaurant Customer Traffic

Customer traffic compared with one year prior was assessed as follows:

<table>
<thead>
<tr>
<th>Region</th>
<th>Higher</th>
<th>Lower</th>
<th>Same</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>44%</td>
<td>22%</td>
<td>24%</td>
</tr>
<tr>
<td>New England Region</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Middle Atlantic Region</td>
<td>25%</td>
<td>50%</td>
<td>25%</td>
</tr>
<tr>
<td>Upper South Atlantic Region</td>
<td>20%</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Lower South Atlantic Region</td>
<td>25%</td>
<td>25%</td>
<td>50%</td>
</tr>
<tr>
<td>East North Central Region</td>
<td>50%</td>
<td>27%</td>
<td>23%</td>
</tr>
<tr>
<td>East South Central Region</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>West North Central Region</td>
<td>43%</td>
<td>14%</td>
<td>43%</td>
</tr>
<tr>
<td>West South Central Region</td>
<td>50%</td>
<td>50%</td>
<td>2%</td>
</tr>
<tr>
<td>Mountain Region</td>
<td>25%</td>
<td>58%</td>
<td>17%</td>
</tr>
<tr>
<td>Pacific Region</td>
<td>52%</td>
<td>29%</td>
<td>19%</td>
</tr>
<tr>
<td>California</td>
<td>50%</td>
<td>36%</td>
<td>14%</td>
</tr>
<tr>
<td>Michigan</td>
<td>71%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>25%</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>Washington</td>
<td>60%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>43%</td>
<td>14%</td>
<td>14%</td>
</tr>
</tbody>
</table>

### 6.4 Outlook

Sales expectations in the coming six months were assessed as follows:

<table>
<thead>
<tr>
<th>Region</th>
<th>Higher</th>
<th>Lower</th>
<th>Same</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>38%</td>
<td>9%</td>
<td>53%</td>
</tr>
<tr>
<td>New England Region</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Middle Atlantic Region</td>
<td>33%</td>
<td>8%</td>
<td>58%</td>
</tr>
<tr>
<td>Upper South Atlantic Region</td>
<td>20%</td>
<td>20%</td>
<td>60%</td>
</tr>
<tr>
<td>Lower South Atlantic Region</td>
<td>75%</td>
<td>0%</td>
<td>25%</td>
</tr>
<tr>
<td>East North Central Region</td>
<td>55%</td>
<td>14%</td>
<td>32%</td>
</tr>
<tr>
<td>East South Central Region</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>West North Central Region</td>
<td>29%</td>
<td>0%</td>
<td>71%</td>
</tr>
<tr>
<td>West South Central Region</td>
<td>50%</td>
<td>17%</td>
<td>33%</td>
</tr>
<tr>
<td>Mountain Region</td>
<td>33%</td>
<td>0%</td>
<td>67%</td>
</tr>
<tr>
<td>Pacific Region</td>
<td>24%</td>
<td>14%</td>
<td>62%</td>
</tr>
<tr>
<td>California</td>
<td>21%</td>
<td>14%</td>
<td>64%</td>
</tr>
</tbody>
</table>
- Michigan: 86% 0% 24%
- Pennsylvania: 50% 0% 50%
- Washington: 20% 0% 80%
- Wisconsin: 43% 14% 43%

### 6.5 Market Resources

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

Restaurant Industry Tracking Survey - monthly survey results are presented at www.restaurant.org/News-Research/Research/Restaurants-The-Economy/trackingsurvey
7

DINING OUT

7.1 Overview

The Harris Poll (www.theharrispoll.com) found that 90% of U.S. adults dine out at least once per month for lunch or dinner. By demographic, those who do so are as follows:

Gender
- Female: 90%
- Male: 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 visit in a typical 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:

<table>
<thead>
<tr>
<th>Gender</th>
<th>QSR Local</th>
<th>Casual Chain</th>
<th>Local Fine Dining</th>
<th>Fine Dining Chain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female:</td>
<td>62%</td>
<td>55%</td>
<td>54%</td>
<td>17%</td>
</tr>
<tr>
<td>Male:</td>
<td>66%</td>
<td>53%</td>
<td>50%</td>
<td>19%</td>
</tr>
</tbody>
</table>

**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%

### 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:

<table>
<thead>
<tr>
<th></th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>American</td>
<td>35%</td>
<td>26%</td>
</tr>
<tr>
<td>Italian</td>
<td>22%</td>
<td>24%</td>
</tr>
<tr>
<td>Mexican</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>Chinese</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Japanese</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Middle-Eastern</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Indian</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>French</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>6%</td>
</tr>
</tbody>
</table>

By region, favorite cuisine is as follows:

<table>
<thead>
<tr>
<th></th>
<th>East</th>
<th>Midwest</th>
<th>South</th>
<th>West</th>
</tr>
</thead>
<tbody>
<tr>
<td>American</td>
<td>34%</td>
<td>34%</td>
<td>32%</td>
<td>22%</td>
</tr>
<tr>
<td>Italian</td>
<td>31%</td>
<td>21%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>Mexican</td>
<td>7%</td>
<td>13%</td>
<td>18%</td>
<td>24%</td>
</tr>
<tr>
<td>Chinese</td>
<td>13%</td>
<td>17%</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>Japanese</td>
<td>4%</td>
<td>4%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Middle-Eastern</td>
<td>2%</td>
<td>1%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Indian</td>
<td>1%</td>
<td>4%</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>French</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
<td>3%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

7.5 Market Resources
8

PUBLICALLY TRADED RESTAURANT CORPORATIONS

8.1 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 2016).

8.2 Restaurant Stocks and Market Capitalization
Publically traded restaurant corporations and their market capitalization are as follows:

<table>
<thead>
<tr>
<th>Company</th>
<th>Ticker</th>
<th>Market Cap</th>
</tr>
</thead>
<tbody>
<tr>
<td>McDonald’s Corporation:</td>
<td>MCD</td>
<td>$108.0 billion</td>
</tr>
<tr>
<td>Starbucks Corp.:</td>
<td>SBUX</td>
<td>$85.5 billion</td>
</tr>
<tr>
<td>Yum! Brands, Inc.:</td>
<td>YUM</td>
<td>$31.1 billion</td>
</tr>
<tr>
<td>Chipotle Mexican Grill, Inc.:</td>
<td>CMG</td>
<td>$14.0 billion</td>
</tr>
<tr>
<td>Darden Restaurants, Inc.:</td>
<td>DRI</td>
<td>$9.0 billion</td>
</tr>
<tr>
<td>Restaurant Brands International, Inc.:</td>
<td>QSR</td>
<td>$7.2 billion</td>
</tr>
<tr>
<td>Dominos Pizza, Inc.:</td>
<td>DPZ</td>
<td>$6.0 billion</td>
</tr>
<tr>
<td>Panera Bread Company:</td>
<td>PNRA</td>
<td>$4.5 billion</td>
</tr>
<tr>
<td>Dunkin Brands Group, Inc.:</td>
<td>DNKN</td>
<td>$3.8 billion</td>
</tr>
<tr>
<td>Buffalo Wild Wings, Inc.:</td>
<td>BWLD</td>
<td>$3.0 billion</td>
</tr>
<tr>
<td>Cracker Barrel Old Country Store, Inc.:</td>
<td>CBRL</td>
<td>$3.0 billion</td>
</tr>
<tr>
<td>The Wendy’s Company:</td>
<td>WEN</td>
<td>$2.9 billion</td>
</tr>
<tr>
<td>Brinker International, Inc.:</td>
<td>EAT</td>
<td>$2.8 billion</td>
</tr>
<tr>
<td>Jack in the Box, Inc.:</td>
<td>JACK</td>
<td>$2.7 billion</td>
</tr>
<tr>
<td>Texas Roadhouse, Inc.:</td>
<td>TXRH</td>
<td>$2.5 billion</td>
</tr>
<tr>
<td>The Cheesecake Factory Incorporated:</td>
<td>CAKE</td>
<td>$2.3 billion</td>
</tr>
<tr>
<td>Papa John’s International, Inc.:</td>
<td>PZZA</td>
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PART II: TRENDS FOR 2016
9.1 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 2015 list.

9.2 Culinary Themes

The top culinary themes for 2015 are as follows:
1. Environmental sustainability
2. Natural ingredients/minimally processed food
3. Hyper-local sourcing (e.g. restaurant gardens)
4. Food waste reduction management
5. Gluten-free cuisine

9.3 Top Menu Trends

Chefs of the American Culinary Federation rank the top menu trends for 2015 as follows:

Table-Service Restaurants
1. Locally sourced meat or seafood
2. Locally grown produce
3. Environmental sustainability
4. Healthful kids’ meals
5. Natural ingredients/minimally processed food
6. New cuts of meat (e.g. culotte/sirloin cap, teres major, tri-tip)
7. Hyper-local sourcing (e.g. restaurant gardens)
8. Sustainable seafood
9. Food waste reduction management
10. Farm/estate-branded items
11. Non-wheat noodles/pasta (e.g. quinoa, rice, buckwheat)
12. Gluten-free items
13. Ancient grains (e.g. kamut, spelt, amaranth, lupin)
14. Whole-grain items in kids’ meals
15. Non-traditional fish (e.g. branzino, Arctic char, barramundi)
16. Ethnic-inspired breakfast items (e.g. Asian-flavored syrups, Chorizo scrambled eggs, coconut milk pancakes)
17. Nutrition
18. House-made/artisan ice cream
19. Fruit/vegetable kids’ side items
20. Artisan cheeses
21. Heirloom apples
22. Vegetarian appetizers
23. Artisan butchery
24. Unusual/uncommon herbs (e.g. chervil, lovage, lemon balm, papalo)
25. Organic produce

Limited-Service Restaurants
1. Gluten-free items
2. Sustainable food items
3. Locally sourced produce
4. Fruit/vegetable sides in kids’ meals
5. Mini-desserts/dessert bites
6. Gourmet grilled cheese
7. “Build your own” items
8. Healthful kids’ meals
9. Locally sourced meat and seafood
10. Low-fat/non-fat milk or 100% juice options in kids’ meals
11. Spicy items
12. Organic items
13. Specialty coffee
14. Artisan/house-made items
15. Ethnic condiments/toppings (sriracha, kimchi, chimichurri, etc.)
16. Lower-sodium items
17. Flatbreads
18. Southeast Asia cuisine (Thai, Vietnamese, Indonesian, etc.)
19. Ethnic fusion cuisine
20. Grain-based salads (quinoa, farro, barley, etc.)
21. Lower-calorie items
22. Snack-sized items
23. Barbecue/pulled pork
24. Ethnic breakfast items
25. Non-wheat noodles/pasta

9.4 Top Trends By Category
By food category, the following are the top trends for 2015:
Appetizers
1. Vegetarian appetizers
2. House-cured meats/charcuterie
3. Ethnic/street-food-inspired appetizers (e.g. tempura, taquitos, kabobs, hummus)
4. Seafood charcuterie
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. Egg white omelets/sandwiches
4. Prix fixe brunches
5. Breakfast burritos

Dessert
1. House-made/artisan ice cream
2. Bite-size/mini-desserts
3. Savory desserts
4. Hybrid desserts (e.g. cronut, townie, ice cream cupcake)
5. Smoked dessert ingredients

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

Kids’ Meals
1. Healthful kids’ meals
2. Whole-grain items in kids’ meals
3. Fruit/vegetable children’s side items
4. Kids’ entree salads
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. New cuts of meat (e.g. Denver steak, pork flat iron, teres major)
3. Sustainable seafood
4. Nontraditional fish (e.g. branzino, Arctic char, barramundi)
5. Grass-fed beef
Nonalcoholic Beverages
1. Gourmet lemonade (e.g. house-made, freshly muddled)
2. Specialty iced tea (e.g. Thai-style, Southern/sweet, flavored)
3. House-made soft drink/soda/pop
4. Organic coffee
5. Coconut water

Preparation Methods
1. Pickling
2. Fermenting
3. Fire roasted
4. Smoking
5. Sous vide

Produce
1. Locally grown produce
2. Heirloom apples
3. Unusual/uncommon herbs (e.g. chevril, lovage, lemon balm, papalo)
4. Organic produce
5. Exotic fruits

Sides/Starches
1. Non-wheat noodles/pasta (e.g. quinoa, rice, buckwheat)
2. Ancient grains (e.g. kamut, spelt, amaranth, lupin)
3. Quinoa
4. Black/forbidden rice
5. Pickled vegetables

Other Food Items/Ingredients
1. Farm/estate-branded items
2. Artisan cheeses
3. Non-wheat flour (e.g. peanut, millet, barley, rice)
4. House-made/artisan pickles
5. Artisan/specialty bacon
10

FOOD & DINING TRENDS

10.1 Overview
This chapter provides summaries of forecasts for dining trends in 2016 based on the assessments of the following analysts and media sources:
• Andrew Freeman & Co. (www.afandco.com)
• Baum + Whiteman (www.baumwhiteman.com)
• Datassential (www.datassential.com)
• Flavor Forecast (www.flavorforecast.com)
• Nation’s Restaurant News (www.nrn.com)
• Sterling-Rice Group (www.srg.com)
• Technomic (www.technomic.com)

10.2 Andrew Freeman & Co.
Andrew Freeman & Co. forecasts the following restaurant and dining trends for 2016:
Brunch
• Breakfast and brunch go full-throttle with decadence and indulgence. Why not throw caloric caution to the wind once a week? Decadent French toast, egg dishes, foie gras, caviar, oysters, you name it – it’s what’s for over-the-top breakfast/brunch.

Cucumbers
• Cucumbers have become the ‘it’ vegetable, prompting chefs to source more varieties that go way beyond the familiar English seedless varieties like tiny Kirby and Lemon cucumbers. Cucumbers are versatile because the add texture, coolness, freshness, and absorb flavoring easily (and they’re packed with fiber).

Discarded to Delicious
• With higher food and labor costs impacting restaurateurs, there’s a growing need to figure out how to save money. Add to that the move toward creating less waste, and chefs are embracing and utilizing the bits and pieces of all sorts of ingredients that were previously discarded to create delicious new dishes.

Fiery Foods
• Fiery, spicy foods are not only delicious, but supposedly really good for you,
according to various research. From the obvious chili oil to the now-ubiquitous sriracha to the creatively-inspired spicy maple syrup, American palates are embracing and relishing the heat. Now more than ever, desserts and beverages are enhanced with spice and heat.

**Filled Foods**
- Samosas, empanadas, dumplings, and blintzes: Every culture/cuisine has a filled item of deliciousness. Chefs continue to delight in the pleasures of the familiar, filling, and always delicious foods of the world.

**Flour Power**
- Restaurants and cafes have been creating unique condiments, pickling veggies, rolling pastas, and making dairy items in house for quite some time now. Looking to expand upon these in-house programs, these same restaurants and cafes are sourcing small grain mills to create small-batch flours, which they use in a vast array of breads, desserts, and more, ensuring that all dishes contain the freshest and most flavorful ingredient grains.

**Fried Chicken**
- Fried chicken continues to grow in popularity from authentic, southern-inspired to ethnic-influenced twists on the favorite comfort food.

**Hawaiian Cuisine**
- Hawaiian food is the latest regional ‘New American’ food that’s getting its place in the spotlight.

**Ice Cream Sandwiches**
- Ice cream sandwiches have been popping up on dessert menus from casual spots to fine-dining restaurants.

**Lobster Rolls**
- The ultimate comfort food/seafood sandwich is the lobster roll. Despite always appearing as a more premium priced menu item, diners willingly pay the price for decadent, buttery lobster meat on a bun.

**Sliders**
- Sliders continue to lend themselves to more than just mini burgers. With their small size, they’re the perfect mini-bite indulgence for restaurants to experiment with. For bar menus and beyond, sliders satisfy.

**Under Compression**
- Compressed melon and root vegetables are becoming staples in both high-end and casual establishments, as modernist technique is further investigated and integrated in ways that aren’t so ‘science experiment’ like.
Vegetables
• Vegetables are the hero this year. They’ve become the center of the plate component, not simply a side dish. People want less animal protein and are requesting that veggies are ramped up to their fullest creative potential – and if a dish happens to be vegetarian or vegan, that’s okay. Millennials love this trend, since there is an environmentally responsible edge to it.

10.3 Baum + Whiteman
Baum + Whiteman annually develops lists of restaurant and hotel food trends. The following is Baum + Whiteman’s 11 Hottest Food & Beverage Trends for Restaurants and Hotel Dining for 2016:
Acai Bowls
• Acai bowls are the next big hipster food. They are a big-bowl smoothie made from frozen acai pulp and soy or other milk plus bananas, bits of other fruit, and lots of ice. Toppings include granola, chia seeds, chocolate chips, coconut flakes, and peanut butter.

Clean Menus
• After watching aggressive consumers attack food processing companies over chemicals and additives, restaurants are dumping some artificial and other bad-for-you ingredients from their menus. We’re looking at the ‘healthification’ of fast- and fast-casual food.

Delivery
• Tech-driven delivery is 2015-2016’s ‘big disrupter’ of food retailing and food service. Aimed at the ultimate in consumer convenience, food is brought quickly to homes, offices, and hotel guests. Delivery affects everyone from McDonald’s to white tablecloth emporiums.

Endangered Pasta
• In the last five years pasta sales dropped 8% in Australia, 13% in Europe, and 25% in Italy. It isn’t a pasta crisis in the U.S. yet but pasta sales are down 6% as more and more Americans focus on proteins and shed carbs, shun gluten, and subscribe to Paleo dining.

Fried Chicken
• Sandwich of the Year: Fried Chicken. No longer just southern, fried chicken sandwiches have gone creative and ethnic.

Heat Is Not Enough
• America’s pepperheads are (finally) discovering that heat is not enough ... that food
also has flavors. There is an interesting shift from just-plain-incendiary to aromatic and flavorful spice blends and sauces.

**New-ish Jew-ish Cuisine**
- There’s a resurgence of Jew-ish food. The (dash) signifies we’re talking about chef-driven modern Jewish cookery rather than heavyweight Eastern European dishes. Chefs everywhere are today exploring their roots and cuisines. In the case of new Jew-ish cuisine, chefs are reinventing dishes and foodways that second generation immigrants turned their backs on except at holidays. Chefs are juggling their culinary traditions with modernity.

**Poke**
- Poke (pronounced poke ay and poh key) is a Hawaiian mainstay that is migrating to the mainland. It is basically a bowl of chopped or cubed raw fish, traditionally ahi tuna over seaweed seasoned rice. Pokerias are cropping up on the West Coast and ahi is giving way to octopus, scallops, salmon, and blue fin.

**Retail Restaurants**
- U.S. retailers are building revenue by luring shoppers into stores for snacks and meals. They have discovered the magic of ‘dwell time’ ... the longer you keep a shopper on the premises, the more the shopper will buy per hour of stay. Theme parks understood this decades ago, as did museums with gift shops. The trend is a threat to conventionally located restaurants because in-store eateries are aimed at high-spending Millennials.

**Snacking**
- Snacks are obliterating meals. It’s not just Millennials or dashboard diners ... growing numbers of Americans snack four or five times daily. Snacking increased 47% from 2010 to 2014. Snack flavor profiles are changing. The ground is shifting away from sweet to savory and from high-carb to nutrient dense high-protein indulgent snacks.

**Tipping And Wages**
- In truth, the restaurant industry’s amazing growth over the past five decades has depended on artificially low prices that are based upon underpaid labor. In the fast food business, low labor costs are subsidized by taxes on the general public to pay for employees’ food stamps and other supplementary welfare payments. At high-end restaurants, your $36 main course could easily have been made by a $10/hour cook sweating in an overheated kitchen. Fact is that even above $15/hour, restaurants are finding it impossible to hire cooks while keeping their labor costs in line. Meanwhile, local governments are passing ‘living wage’ laws, lifting minimum wages, and sometimes abolishing tip credits. The disparity between earnings of tipped waiters and untipped back-of-house staff is becoming a moral issue tinged with class warfare. Meanwhile, waiters sue over untipped sidework and lower-down
employees are inflamed by how tips are distributed. Look for developments in this area.

**Vegetables**
- We’ve reached a tipping point for vegetables. Relentlessly rising beef prices, horror over hormones, a scramble for ever-more antioxidants, health-and-diet concerns, growth of farmers markets, locavore drummers, increasing numbers of flexitarians … all the stars have nicely aligned. It helps that vegetables are more seasonal, adding menu excitement for restaurants recognizing that buying seasonally reduces food costs and keeps menus fresh.


### 10.4 Datassential
Datassential foresees the following flavors and ingredients as having an increasing presence on restaurant menus in 2016:

**Berbere**
- This Ethiopian spice mix often includes chili peppers, fenugreek seeds, ginger, garlic, cinnamon, paprika, and more.

**Espelette**
- Also called piment d’Espelette, these bright red peppers are produced in France’s Basque region and often found dried or powdered.

**Mostarda**
- An Italian condiment in which fruits are candied and preserved with a bit of mustard seed, powder, or oil, often accompanying meats.

**Romesco**
- This bright red sauce or dip made from roasted nuts and red peppers is a staple in the Catalan region of Spain.

**Pardon Peppers**
- Like shishito peppers, every so often one of these peppers grown in Northwestern Spain packs a punch of heat.

**Pistou**
- Sometimes called ‘French pesto,’ this mix of garlic, basil, and olive oil is a staple in Provencal French cooking.
Shiso
• Also known as Japanese basil, this relative to mint is often served with sushi, but it can also be added to salads, soups, rice bowls, and stir fries.

Sorrel
• This green leafy plant has a citrusy, tangy, lemony taste, and is often used in salads, egg dishes, or soups.

Sumac
• The dark red berries of the Middle Eastern sumac bush are typically found powdered and sold as a spice – it has a tart, lemony flavor.

Turmeric
• This bright yellow spice which adds a vivid hue to any dish has been trending for its health properties – look for it in smoothies and juices.

10.5 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 2016 is as follows:
Alternative ‘Pulse’ Proteins
• Packed with protein and nutrients, pulses such as dried peas, beans and lentils are elevated when paired with delicious ingredients.
  - Pigeon Peas (called Toor Dal when split): Traditionally paired with cumin and coconut
  - Cranberry Beans (also called Borlotti): Perfectly enhanced with sage and Albariño wine
  - Black Beluga Lentils: Uniquely accented with peach and mustard

Ancestral Flavors
• Modern dishes reconnect with native ingredients to celebrate food that tastes real, pure and satisfying.
  - Ancient Herbs: Rediscover thyme, peppermint, parsley, lavender and rosemary
  - Amaranth: An ancient grain of the Aztecs with a nutty, earthy flavor
  - Mezcal: Smoky Mexican liquor made from the agave plant

Blends With Benefits
• Flavorful herbs and spices add everyday versatility to good-for-you ingredients like matcha and chia.
  - Matcha Green Tea: Ginger and citrus balance the slightly bitter notes of matcha
  - Flaxseed: Mediterranean herbs invite flax to savory dishes
- Chia Seed: Chia becomes zesty when combined with citrus, chile and garlic
- Turmeric: Discover sweet possibilities when turmeric is blended with cocoa, cinnamon and nutmeg

Culinary-Infused Sips
- Three classic culinary techniques provide new tastes and inspiration in the creation of the latest libations.
  - Brûléed: Caramelized sugar note provides depth
  - Pickled: Combines tart with spice for zesty results
  - Roasted: Distinctive browned flavor adds richness

Heat + Tang
- Spicy finds a welcome contrast with tangy accents – lime, rice vinegar, yuzu, tamarind, Meyer lemon, cranberry, kumquats and ponzu – to elevate the eating experience.
  - Peruvian Chilies + Lime: Citrus paired with rocoto, aji panca, aji amarillo, and more
  - Sambal Sauce: Spicy Southeast Asian sauce made with chilies, rice vinegar, sugar, and garlic

Tropical Asian
- Adventurous palates seek flavors from new regions. Two spots in Southeast Asia – Malaysia and the Philippines – offer distinctive ingredients and signature recipes for vibrant fare.
  - Pinoy BBQ: Popular Filipino street food flavored with soy sauce, lemon, garlic, sugar, pepper, and banana ketchup
  - Rendang Curry: Malaysian spice paste with mild heat made from chilies, lemongrass, garlic, ginger, tamarind, coriander, and turmeric

10.6 Nation’s Restaurant News

Bret Thorn, Senior Food Editor at Nation’s Restaurant News, expects to see the following trends in 2016:
- A number of chefs returned to butchering their own hogs and lamb years ago (beef less so). Some chefs have taken to milling their own flour. What’s next? One beverage director is talking about distilling ready-to-drink cocktails (possibly like a very complex gin). Some chefs may keep their own goats to make cheese, and maybe cultivate mushrooms in their basements. In-house beer brewing, after booming and busting in the 80s and 90s, is coming back.
- Americans are likely going to continue seeking out clean labels and somewhat lighter options, while continuing to eat bacon double cheeseburgers with seeming abandon. Their diets are likely to shift with their whims, from high-protein to gluten-free to meatless.
• As craft beer becomes more mainstream, or as mainstream beer drinkers turn to craft beer, we’ll likely see a resurgence of traditional American favorites such as lagers in general and pilsners in particular.
• Consumers will likely be eating a lot of fried chicken.
• Having established that many Americans love spicy food, we’ll likely see restaurants move beyond the now-ubiquitous sriracha sauce. This is a well-established practice at independent restaurants, many of which are making their own hot sauces, but new types of heat are spreading to chains, too.
• Kale will probably continue to be popular, but quinoa might gradually fade from the scene as more grains, especially wheat varieties like farro and kamut, become more mainstream.
• Mushrooms cost less than meat, are low in calories, have micronutrients and are umami bombs. Grind them up finely, mix them with ground meat, and you have a nice, flavorful, lower calorie burger. It’s an idea that, not surprisingly, the Mushroom Council has been pushing for a few years now, and it’s starting to catch on.
• Snacking is on the rise ... so are smoothies and other drinkable foods, as well as miniature desserts. So why hasn’t anyone offered these quick pick-me-ups for mid-morning snacks or those 4:00 pm low-energy moments: 4-ounce milk shakes of around 200 calories each, priced at around $2. It seems like a no-brainer.
• The drumbeats of local/seasonal and farm-to-table continue, and they’re best expressed with produce, meaning the floodgates are open for chefs to highlight and celebrate vegetables, offering them as the center of a meal rather than nutritional obligations. As chain restaurants face requirements to post calorie information on their menus and menu boards, vegetables offer the opportunity to add color, flavor, texture and perceived value to dishes as starches and high-fat proteins and calorie counts shrink.
• Wine drinkers looking to explore have shown an interest in pushing the limits. Few American wine drinkers have been raised on classic varietals, so the adventurous ones are open to whatever you have to offer. Many Millennials have shown an abiding interest in sweet wine, particularly Moscato, but that leaves the way open for off-dry rieslings, and then maybe even dry ones. Young red wine drinkers are enjoying affordable Argentine malbecs these days, but they’ll likely be open to a Greek xinomavro, Uruguayan tanat, and even those affordable Romanian wines.

10.7 Sterling-Rice Group

Sterling-Rice Group foresees the following as cutting-edge dining trends in 2016:

Coffee’s New Guises

• Coffee on nitro tap; dry-hopped coffee on nitro tap. Coffee cherry brews. Coffee butter brews. There’s no end to the creative libations coming our way from inventive baristas. With an unprecedented groundswell of fantastic coffee, plus a plethora of beautifully designed coffee bars, it’s no wonder there are so many new coffee concoctions for every hour of the day.
Delivery
• Get ready for the continued explosion of meal-kit-delivery services vying for your dining dollar. While the big meal-kit companies expand nationally, local services tap new niches, like paleo meals or Southern cuisine. Competition will get fierce with delivered groceries and ready-to-eat meals also in the fray, yet all that packaging remains a pitfall.

Intensified Dessert
• Miso. Malt. Ricotta whey. Cornhusk ash. These ingredients and more are turning up in surprising places, namely dessert. Pastry chefs, ice cream makers, and confectioners are tapping au courant culinary tricks (browning, burning, smoking) and flavorful ingredients (dairy whey, malt, umami-rich miso paste) to add sophisticated taste dimensions beyond just sweet to our favorite desserts and treats.

Onolicious Hawaiian
• Creative, delicious ('ono) Hawaiian cuisine is finally making a splash on the mainland. Inspired chefs are translating traditional island ingredients into cool new dishes in fine dining, while fast-casual entrepreneurs introduce bowl-loving crowds to the joy of poké, a raw seafood salad. Even Spam (sometimes housemade) is getting some love, in classic musubi rice-and-nori wraps.

Oysters To The Rescue
• With sustainable seafood as important as ever, cultivated oysters are big heroes. Filling in for wild oysters struggling in acidified and warming waterways, farmed oysters not only do their part filtering pollutants from our coastal waterways, they are also fueling an exciting resurgence of oyster and raw bars, once staples in American dining. Expect the burgeoning Millennial taste for oysters to grow in years to come.

Pass The Platter
• The latest way to dine? Family-style meals made of centerpiece proteins – whole fish or chickens, piles of ribs – and accompanying sides. Or just a whole menu of dishes meant for the table to share. Chefs today are having fun cooking larger cuts of meat and preparing beautiful platters of goodies. Diners can relax into a new convivial spirit at the table where one doesn’t have to share a small plate anymore.

Pumped-Up Porridge
• Porridge is making a comeback, thanks to the ever-widening selection of grains and seeds — ancient and otherwise — chefs are discovering. Porridges made of rye, spelt, black rice, or quinoa feature some sweet but mostly savory toppings like mushrooms, vegetables, smoked fish, and eggs. Some tilt toward congee, others toward oatmeal, and still others serve as side dishes.
Swiggable Soups
• One step beyond all those fancy pressed juices comes bottled sippable soups. We’re not talking chicken noodle, but rather bright and spicy gazpachos, creamy coconut cauliflower, and even mushroom-based broths. Savory flavors, more fiber, and, of course, portability make nutrient-rich bottled soups a convenient grab-and-go meal (or even a handy cleanse) and without the sugar of juices.

Switchin’ To Switchels
• With vinegar-based shrubs now firmly in the beverage pantry, another colonial refresher beckons: switchels. Known as haymakers in New England, this blend of water, apple cider vinegar, ginger, and honey, maple syrup, or molasses traditionally quenched thirsts during harvest. Today’s switchels – bottled or homemade – leverage the health-promoting benefits of apple cider vinegar with a dash of American heritage.

The Savory Side Of Yogurt
• We can probably thank Ottolenghi for our growing excitement about labneh, the thick, salted Middle Eastern yogurt. But it also meshes with our efforts to reduce sugar and savor more Middle Eastern cuisine. Often served with olive oil, spices and seeds, and flatbread, labneh also plays well with vegetables, grain salads, and roasted fruit.

10.8 Technomic
Technomic foresees the following restaurant trends in 2016:

Bubbly
• Effervescence makes light work of the trendiest beverages: Champagnes and proseccos, Campari-and-soda aperitifs, adults-only ‘hard’ soft drinks including ginger ales and root beers, fruit-based artisanal sodas, and sparkling teas.

Burned
• Smoke and fire are showing up everywhere on the menu: in charred or roasted vegetable sides; in desserts with charred fruits or burnt-sugar toppings; in cocktails featuring smoked salt, smoked ice, or smoky syrups.

Delivery Revolution
• Proliferating order-and-pay apps and third-party online ordering and delivery services make ‘dining in’ easier than ever and, in some cases, ‘dining out’ a thing of the past. Transformational companies like Uber and Amazon are muscling into the market. App-only services like Munchery deliver food from commissaries, bypassing the brick-and-mortar restaurant altogether.
Elevating Peasant Fare
- Meatballs and sausages are proliferating – traditional, ethnic or nouveau, shaped from many types and combinations of meats. Multi-ethnic dumplings, from pierogis to bao buns, are also increasing in popularity.

Fast Food Refresh
- Consumers are gravitating to ‘better’ fast food, transforming and diversifying the industry. ‘QSR plus’ concepts with fresher menus and spanking-bright units exploit a price niche between fast food and fast casual (think Culver’s or Chick-fil-A). ‘Build your own’ formats are springing up in more menu categories. Many quick-service eateries are adding amenities like alcohol. Others are giving up on upscaling and returning to their roots, serving simple, traditional menus at low prices.

Negative On GMOs
- Many consumers have made up their minds: no genetic tinkering with their food. Some diners will gravitate to restaurants touting GMO-free fare; others will demand GMO labeling on menus. That’s a big issue for the supply chain, since many crops (such as soy fed to livestock) have been modified to boost productivity.

Modernizing The Supply Chain
- Climate destabilization, mutating pathogens, and rising transportation costs, among other challenges, will lead to increasingly frequent stresses on the food supply chain, such as the Florida orange freeze in 2015 or an avian flu-related egg shortage. Consumer demand for ‘fresh’ and ‘local’ fare also challenges a distribution system based on consolidation, centralization, large drop sizes, and long shelf life.

Sriracha Effect
- Having learned that sriracha sauce can add instant ethnic cachet to something as straightforward as a sandwich, chefs are scouting the world for other assertive flavorings to employ in similar ways. Likely bets: ghost pepper from India; sambal from Southeast Asia; gochujang from Korea; harissa, sumac, and dukka from North Africa.

Trash To Treasure
- Rising prices for proteins raise the profiles of under-utilized stewing cuts, organ meats, and ‘trash’ species of fish – but the ‘use it all’ mindset has also moved beyond the center-of-the-plate. How about a veggie burger made with carrot pulp from the juicer?

Year Of The Worker
- In today’s tighter labor market, mandates to boost minimum wages will reverberate up and down the workforce, with experienced staffers demanding proportional raises and skilled workers (already in short supply) even harder to hire. That’s tough news
for operators trying to hold down menu prices. Front-of-house technology and back-of-house automation will help restaurants do more with fewer or lower-level workers, and companies will devote more resources to training and retention.
PART III: THE CUSTOMER
11

CUSTOMER PROFILE

11.1 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

11.2 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.

11.3 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.themediaaudit.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.

### 11.4 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.

An August 2015 survey by The NPD Group found the following barriers to repeat visits to local restaurants (percentage of respondents):

- Too expensive: 43%
- Interested in different foods/beverages: 26%
- Get bored with the same place: 24%
- Like to try new places: 23%
- Look for better deals or promotions: 23%
12

DINING WITH CHILDREN

12.1 Dining With Children Under 13

Restaurant visits by families with children represent $83.7 billion in annual sales, or about 20% of total restaurant 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.

According to The NPD Group (www.npd.com), families with children under age 13 made 14.5 billion restaurant visits in 2015, a decline from 15.5 billion visits in 2008.

When asked in a 2015 survey by NPD the reasons for eating out less often, parents with children responded as follows (responses by age of parents):

- Prefer home cooking: 54% 38% 29%
- Watching spending: 49% 55% 54%
- Too expensive: 39% 48% 51%
- Bad economy: 44% 19% 35%
- Only dine out on special occasions: 28% 16% 16%
- Restaurants are not kid-friendly: 28% 14% 10%

“According to NPD, families with kids made 1.2 billion fewer visits to restaurants than they did in 2008. For Millennial families, those cutbacks are in part due to dissatisfaction with the menu choices for children.”

Nation’s Restaurant News, 3/2/15

12.2 Dining With Children Under 18

Families with children under 18 years old made 26.7 billion restaurant visits in 2015, a drop of 14% from five years prior.
By annual household income, average per-capita restaurant visits by families with children under age 18 were as follows:

- Under $45,000: 145
- Over $45,000: 181

Families in all income groups with children under age 18 visit QSRs for the majority of their restaurant occasions. Higher income families choose 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%.
HISPANIC-AMERICAN CUSTOMERS

13.1 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.

13.2 Hispanic Restaurant Patronage
According to the 2015 Hispanic Foodservice Consumer Trend Report, by Technomic (www.technomic.com), 41% of Hispanic adults order food from restaurants at least twice a week.

National Eating Trends Hispanic, by The NPD Group (www.npd.com), reported that 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
According to a May 2015 report by The NPD Group, Hispanics’ per capita visits to quick-service restaurants increased 4% during the prior 12-month period compared with a 1% decline by non-Hispanics. Hispanics’ visits to full-service restaurants decreased by 7% while visits by non-Hispanics declined by 1%.

Overall, U.S. Hispanics’ per capita spending at restaurants increased by 4% compared with a 3% increase in per capita spending for non-Hispanics.

13.3 Hispanic-American Dining Characteristics

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-acculturated Hispanic-Americans who speak only or mostly Spanish. The following daytime restaurant traffic distribution among these three groups is as follows:

<table>
<thead>
<tr>
<th></th>
<th>Non-Hispanics</th>
<th>English-Speaking Hispanics</th>
<th>Less Acculturated Hispanics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lunch</td>
<td>35%</td>
<td>34%</td>
<td>23%</td>
</tr>
<tr>
<td>Supper</td>
<td>33%</td>
<td>32%</td>
<td>24%</td>
</tr>
<tr>
<td>Morning meal</td>
<td>18%</td>
<td>18%</td>
<td>31%</td>
</tr>
<tr>
<td>P.M. snack</td>
<td>15%</td>
<td>15%</td>
<td>22%</td>
</tr>
</tbody>
</table>

According to Technomic, 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, according to Technomic.

“Hispanics stand out from other restaurantgoers, especially in terms of the high importance they place on family-friendly amenities and ambiance, flavor authenticity, and recognizing their culture.”

Darren Tristano, President
Technomic
Hispanics are much more likely to have children with them than non-Hispanics. The following are percentages of restaurant visits by customers dining with children (source: The NPD Group):

- Less acculturated Hispanics: >50%
- English-speaking Hispanics: 33%
- Non-Hispanics: 29%

### 13.4 Hispanic Menu Preferences

According to Technomic’s *2015 Hispanic Foodservice Consumer Trend Report*, 38% of Hispanics say that American-style restaurants should offer some Hispanic flavors on the menu. The following are the top three Hispanic-style entrees they are most likely to order when dining out:

- Carne Asada: 54%
- Burrito: 42%
- Fajita/taco: 37%

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.
14

MILLENNIAL CUSTOMERS

14.1 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 2016, Millennials spanned ages 16 through 34. 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 40 in 2016.

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.

The NPD Group (www.npd.com) reports that Millennials make over 14 billion visits to restaurants and foodservice establishments each year, spending $95 billion on meals and snacks.

_________________________________________________________________

"Among the reasons Millennials command the attention they do from restaurants is because they are the largest of the six key generational groups. What Millennials may lack in buying power, they make up for in influence."

The NPD Group, 10/28/15

_________________________________________________________________

14.2 Restaurant Visits By Millennials

According to The NPD Group (www.npd.com), restaurant visits per capita by young Millennials (age 18-to-24) and older Millennials (age 25-to-34) have been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>18-to-24</th>
<th>25-to-34</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>208</td>
<td>246</td>
</tr>
<tr>
<td>2010</td>
<td>199</td>
<td>233</td>
</tr>
</tbody>
</table>
“Young adults are typically the heaviest restaurant users, but since the Great Recession Millennials have cut back dramatically on their visits to and spending at restaurants. Adults, ages 25-to-34, who are more likely to have families, have cut back the most on restaurant visits, making 50 fewer visits per person per year over the past several years. Additionally, the youngest adults, ages 18-to-24, made 33 fewer visits per person per year in 2014 than they made in 2007. Millennials ate 8 more meals at home last year compared to the prior year while all others ate one additional meal.”

The NPD Group, 6/3/15

14.3 Dining Out

In a survey by the Urban Land Institute (ULI, www.uri.org), Millennials reported dining out as follows:

**Breakfast**

- At least once a week: 22% Men 28% Women 15%
- A few times a month: 16% Men 18% Women 15%
- Rarely or never: 62% Men 54% Women 70%

**Lunch**

- At least once a week: 36% Men 44% Women 28%
- A few times a month: 35% Men 32% Women 38%
- Rarely or never: 29% Men 25% Women 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
<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>African-American</th>
<th>Hispanic</th>
</tr>
</thead>
<tbody>
<tr>
<td>At least once a week:</td>
<td>22%</td>
<td>34%</td>
<td>31%</td>
</tr>
<tr>
<td>A few times a month:</td>
<td>16%</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>Rarely or never:</td>
<td>62%</td>
<td>48%</td>
<td>50%</td>
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</tbody>
</table>

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%

14.4 Preferred Restaurants For Dinner
When asked in the ULI survey their preferred restaurant to go for dinner, responses were as follows:

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hot new restaurant:</td>
<td>12%</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>Favorite local/neighborhood place:</td>
<td>40%</td>
<td>44%</td>
<td>37%</td>
</tr>
<tr>
<td>Casual chain restaurant:</td>
<td>31%</td>
<td>27%</td>
<td>35%</td>
</tr>
<tr>
<td>Fast-casual restaurant:</td>
<td>10%</td>
<td>8%</td>
<td>12%</td>
</tr>
<tr>
<td>Fast-food:</td>
<td>7%</td>
<td>8%</td>
<td>7%</td>
</tr>
</tbody>
</table>

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• 77 •
By ethnicity, responses were as follows:

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>African-American</th>
<th>Hispanic</th>
</tr>
</thead>
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<td>38%</td>
<td>27%</td>
</tr>
<tr>
<td>Fast-casual restaurant:</td>
<td>10%</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Fast-food:</td>
<td>7%</td>
<td>10%</td>
<td>6%</td>
</tr>
</tbody>
</table>

14.5 Dining Priorities

*Millennials Food Study,* published 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.
- 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.
- Healthy eating is a priority among Millennials.
“Millennials are driving changes in this country’s eating behaviors with their approach to food choice and preparation. They like fresh, less processed food, which has played out in their preference for fast casual restaurants that offer freshly prepared foods and shopping the perimeter of grocery stores where fresh and non-packaged foods can be found.”

The NPD Group, 5/7/15
15

RESTAURANT SELECTION

15.1 Selection Criteria

A 2015 survey by Datassential (www.datassential.com) asked consumers about how they select a restaurant to dine at. The following criteria were found to be most important (percentage of respondents):

- Great taste: 74%
- Cleanliness: 70%
- Fresh food: 69%
- Consistent food quality: 66%
- High quality food: 63%
- Good value for the price: 63%
- Affordable: 60%
- Quality of the ingredients used: 59%
- Food is made to order: 53%
- Friendly service: 51%
- Conveniently located: 47%
- Good portion sizes: 43%
- Menu is organized and easy to read: 41%
- Very low prices: 40%
- Food is attractively presented: 39%
- Menu variety: 37%
- Discounts and special deals: 37%
- Have foods not eaten at home: 37%

“When dining away from home, consumers select a restaurant based on great tasting food and restaurant cleanliness. Freshness, quality, consistency, and value are significantly more important to consumers than lowest prices.”

Datassential, 12/15
15.2 Menu Preferences
Datassential has observed that customers are increasingly preferring shorter and more focused menus.

“Historically, the size of menus grew significantly because there wasn’t the food culture there is today. People weren’t nearly as focused on the food, or willing to go out of their way to eat specific foods. But Americans are finally growing tired of all the clunky, and often confusing, food lists. The rise of food culture, where consumers are both interested and willing to go to a restaurant that has the best Banh Mi sandwich, or the best burger, or the best trendy item of the moment, means that operators can now create much more focused menus. It also means that the larger the menu, the more consumers might worry all those things aren’t going to be all that good. I believe this trend will continue, and continue for quite a while. If it reverses, I don’t believe that will happen anytime in the near future.”

Maeve Webster, Senior Director
Datassential
The Washington Post, 9/18/15

Datassential found that restaurants have responded to customers’ preferences for shorter menus (see Figure 15.1). Menu sizes peaked at approximately 100 items in 2008 and have declined since. The average menu size in 2015 was 92.6 items. The trend is clearest among newly restaurants, where menus have only 59.4 items on average.
Figure 15.1. Average U.S. restaurant menu size. (source: Datassential)

15.3 Market Resources
Datassential, 18 S. Michigan Avenue, Chicago, IL 60603. (312) 655-0622.
(www.datassential.com)
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CONSUMER PREFERENCES

16.1 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.

16.2 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:

<table>
<thead>
<tr>
<th></th>
<th>Under 18</th>
<th>18-to-24</th>
<th>25-to-34</th>
<th>35-to-49</th>
<th>50 and Older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fine-dining:</td>
<td>n/a</td>
<td>76%</td>
<td>70%</td>
<td>72%</td>
<td>78%</td>
</tr>
<tr>
<td>Casual-dining:</td>
<td>78%</td>
<td>77%</td>
<td>70%</td>
<td>71%</td>
<td>77%</td>
</tr>
<tr>
<td>Fast-casual:</td>
<td>76%</td>
<td>71%</td>
<td>65%</td>
<td>67%</td>
<td>74%</td>
</tr>
<tr>
<td>Fast-food:</td>
<td>63%</td>
<td>65%</td>
<td>58%</td>
<td>58%</td>
<td>67%</td>
</tr>
</tbody>
</table>

“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:

<table>
<thead>
<tr>
<th>Overall Satisfaction</th>
<th>Likely To Return</th>
</tr>
</thead>
</table>
• Corporate headquarters market: | 71% | 73% |
• All other markets: | 71% | 73% |

“When 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 restaurants as follows:

<table>
<thead>
<tr>
<th>Overall Satisfaction</th>
<th>Temperature of Food</th>
<th>Cleanliness</th>
</tr>
</thead>
</table>
• 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:

<table>
<thead>
<tr>
<th></th>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full menu:</td>
<td>67%</td>
<td>68%</td>
<td>70%</td>
<td>70%</td>
<td>68%</td>
<td>68%</td>
<td>67%</td>
</tr>
<tr>
<td>Pizza:</td>
<td>63%</td>
<td>68%</td>
<td>67%</td>
<td>67%</td>
<td>66%</td>
<td>67%</td>
<td>67%</td>
</tr>
<tr>
<td>Fast-casual:</td>
<td>63%</td>
<td>67%</td>
<td>66%</td>
<td>67%</td>
<td>66%</td>
<td>66%</td>
<td>64%</td>
</tr>
<tr>
<td>Fast-food:</td>
<td>61%</td>
<td>63%</td>
<td>63%</td>
<td>64%</td>
<td>63%</td>
<td>63%</td>
<td>61%</td>
</tr>
</tbody>
</table>

“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:

<table>
<thead>
<tr>
<th></th>
<th>Satisfied Overall</th>
<th>Taste of Food</th>
<th>Pace of Meal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dining room:</td>
<td>70%</td>
<td>72%</td>
<td>64%</td>
</tr>
<tr>
<td>Bar area:</td>
<td>75%</td>
<td>72%</td>
<td>70%</td>
</tr>
</tbody>
</table>

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2016-2017  • 85  •
“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:

<table>
<thead>
<tr>
<th>Highly Satisfied</th>
<th>Likely To Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diners with children under age 12:</td>
<td>62%</td>
</tr>
<tr>
<td>Diners without children under age 12:</td>
<td>63%</td>
</tr>
</tbody>
</table>

“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:

<table>
<thead>
<tr>
<th></th>
<th>Highly Satisfied</th>
<th>Likely To Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>First-time</td>
<td>67%</td>
<td>57%</td>
</tr>
<tr>
<td>Returning</td>
<td>70%</td>
<td>73%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Experienced A Problem</th>
<th>Likely To Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gift card user</td>
<td>24%</td>
<td>28%</td>
</tr>
<tr>
<td>No use of gift card</td>
<td>12%</td>
<td>40%</td>
</tr>
</tbody>
</table>

“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

Highly Satisfying Restaurant Experiences
The difference in highly satisfied customers making a return visit to a restaurant within 30 days compared with all other customers is as follows:
• Casual-dining: 28%
• Fast-casual: 25%
• Quick-service: 12%

“Restaurant guests who said they were highly satisfied with an experience were more likely than all other customers to return to a concept within 30 days.”
Service Management Group
Indoor vs. Outdoor Dining

Based on seating location, restaurant guest satisfaction is as follows:

<table>
<thead>
<tr>
<th></th>
<th>Pace of Experience</th>
<th>Overall Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dining room</td>
<td>74%</td>
<td>69%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>71%</td>
<td>63%</td>
</tr>
</tbody>
</table>

“Guests who dine outside give lower pacing scores than do guests who eat inside. As a result, outdoor diners have a less satisfying overall experience.”

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, positive mentions are made based on the following criteria:

<table>
<thead>
<tr>
<th></th>
<th>Fast-Casual</th>
<th>Quick-Service</th>
<th>Casual-Dining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friendliness</td>
<td>88%</td>
<td>87%</td>
<td>87%</td>
</tr>
<tr>
<td>Taste</td>
<td>86%</td>
<td>83%</td>
<td>87%</td>
</tr>
<tr>
<td>Speed</td>
<td>73%</td>
<td>75%</td>
<td>61%</td>
</tr>
<tr>
<td>Accuracy</td>
<td>59%</td>
<td>60%</td>
<td>53%</td>
</tr>
</tbody>
</table>
“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:

<table>
<thead>
<tr>
<th></th>
<th>Overall Satisfaction</th>
<th>Likely To Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager visible:</td>
<td>84%</td>
<td>81%</td>
</tr>
<tr>
<td>Manager not visible:</td>
<td>65%</td>
<td>55%</td>
</tr>
</tbody>
</table>

“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:

<table>
<thead>
<tr>
<th>Overall Satisfaction</th>
<th>Experienced A Problem</th>
</tr>
</thead>
<tbody>
<tr>
<td>In person:</td>
<td>71%</td>
</tr>
<tr>
<td>Telephone:</td>
<td>69%</td>
</tr>
<tr>
<td>Online or fax:</td>
<td>61%</td>
</tr>
<tr>
<td></td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td>22%</td>
</tr>
</tbody>
</table>
“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

Perceived Restaurant Cleanliness

Restaurant patrons say they are highly satisfied with the cleanliness of the restaurant they are visiting 65% of the time. By time since remodeling, responses are as follows:
• 3 years or less: 70%
• 4 years to 6 years: 67%
• 7 years to 9 years: 66%
• 10 years or more: 61%
“The older a restaurant, the less likely its guests are to say they were highly satisfied with its cleanliness.”

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

<table>
<thead>
<tr>
<th></th>
<th>Satisfied Overall</th>
<th>Likely To Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special occasion:</td>
<td>75%</td>
<td>72%</td>
</tr>
<tr>
<td>Normal dining:</td>
<td>76%</td>
<td>79%</td>
</tr>
</tbody>
</table>

“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:

<table>
<thead>
<tr>
<th></th>
<th>Overall Satisfaction</th>
<th>Likely To Return</th>
<th>Reported A Problem</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steak prepared correctly:</td>
<td>74%</td>
<td>74%</td>
<td>6%</td>
</tr>
<tr>
<td>Steak prepared incorrectly:</td>
<td>43%</td>
<td>50%</td>
<td>26%</td>
</tr>
</tbody>
</table>
“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:

<table>
<thead>
<tr>
<th></th>
<th>Taste of Food</th>
<th>Likely To Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub shop:</td>
<td>73%</td>
<td>67%</td>
</tr>
<tr>
<td>QSR:</td>
<td>67%</td>
<td>57%</td>
</tr>
</tbody>
</table>

“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:

<table>
<thead>
<tr>
<th></th>
<th>Satisfied Overall</th>
<th>Likely To Recommend</th>
</tr>
</thead>
<tbody>
<tr>
<td>With suggestive selling:</td>
<td>80%</td>
<td>76%</td>
</tr>
<tr>
<td>Without suggestive selling:</td>
<td>58%</td>
<td>54%</td>
</tr>
</tbody>
</table>

“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
**Trying New Restaurant Brands**

The percentage of restaurant guests who visited a brand they haven’t been to before in the past 90 days is as follows:

<table>
<thead>
<tr>
<th>Type of Service</th>
<th>&lt;25 miles from home</th>
<th>&gt;100 miles from home</th>
</tr>
</thead>
<tbody>
<tr>
<td>Casual-dining</td>
<td>31%</td>
<td>57%</td>
</tr>
<tr>
<td>Fast-casual</td>
<td>29%</td>
<td>55%</td>
</tr>
<tr>
<td>Quick-service</td>
<td>11%</td>
<td>23%</td>
</tr>
</tbody>
</table>

“Consumers are more likely to try a new restaurant brand when they are 100 miles or more from home.”

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

**16.3 Market Resources**

Service Management Group, 1737 McGee Street, Kansas City, MO 64108.
(800) 764-0439. (www.smg.com)
17

CUSTOMER SATISFACTION

17.1 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 70,000 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.

17.2 ACSI Scores

The ACSI scores for restaurant sectors have been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Full-Service</th>
<th>Limited-Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>81</td>
<td>77</td>
</tr>
<tr>
<td>2008</td>
<td>80</td>
<td>78</td>
</tr>
<tr>
<td>2009</td>
<td>84</td>
<td>78</td>
</tr>
<tr>
<td>2010</td>
<td>81</td>
<td>75</td>
</tr>
<tr>
<td>2011</td>
<td>82</td>
<td>79</td>
</tr>
<tr>
<td>2012</td>
<td>80</td>
<td>80</td>
</tr>
<tr>
<td>2013</td>
<td>81</td>
<td>80</td>
</tr>
<tr>
<td>2014</td>
<td>83</td>
<td>80</td>
</tr>
<tr>
<td>2015</td>
<td>83</td>
<td>77</td>
</tr>
</tbody>
</table>

17.3 Customer Satisfaction Scores

ASCI scores from 2015 surveys and change from 2014 scores for restaurant chains are as follows:

**Full-Service Restaurants**
- Texas Roadhouse: 83 (n/a)
- LongHorn Steakhouse: 81 (n/a)
• Cracker Barrel: 80 (n/a)
• Olive Garden: 79 (-1.3%)
• Applebee’s: 79 (no change)
• Outback Steakhouse: 78 (-2.5%)
• Red Lobster: 77 (-1.3%)
• Red Robin: 77 (n/a)
• TGI Fridays: 76 (n/a)
• Denny’s: 75 (n/a)
• Chili’s: 74 (no change)
• Ruby Tuesday: 73 (n/a)
• All others: 81 (no change)
• Sector average: 83 (no change)

Limited-Service Restaurants
• Chick-fil-A: 86 (n/a)
• Chipotle Mexican Grill: 83 (n/a)
• Panera Bread: 80 (n/a)
• Dunkin’ Donuts: 78 (4.0%)
• Pizza Hut: 78 (-4.9%)
• Papa John’s: 78 (-4.9%)
• Subway: 77 (-1.3%)
• Domino’s: 75 (-6.3%)
• Little Caesars: 74 (-7.5%)
• Starbucks: 74 (-2.6%)
• Arby’s: 74 (n/a)
• KFC: 73 (-1.4%)
• Wendy’s: 73 (-6.4%)
• Taco Bell: 72 (no change)
• Burger King: 72 (-5.3%)
• Jack in the Box: 72 (n/a)
• McDonald’s: 73 (no change)
• All others: 81 (-3.6%)
• Sector average: 77 (-3.8%)

17.4 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: THE MEAL
18

CUISINE

18.1 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; fried cheese curds
• Wyoming: Western breakfast

The following are some local specialties (sources: Forbes, Sky Magazine, USA Today, and various local media sources):
• Albuquerque, NM: Blue corn enchiladas, green chili sauce
• Atlanta, GA: Pot likker
• Baltimore, MD: Maryland crabs
• Boston, MA: Indian pudding, baked beans, surf & turf tacos, scrod
• Buffalo, NY: Buffalo wings
• Charleston, SC: Creamy grits; shrimp and grits
• Chicago, IL: Italian beef sandwiches, hot dogs, deep dish pizza
• Cincinnati, OH: Double-decker sandwich; Cincinnati chili
• Dallas, TX: Barbeque brisket
• Indianapolis, IN: Port tenderloin sandwiches
• Kansas City, MO: Fried chicken dinner, barbecue
• Key West, FL: Key lime pie
• Los Angeles, CA: Fish tacos
• Louisville, KY: Hot Brown
• Memphis, TN: Pulled pork sandwich
• Miami, FL: Stone Crabs, Key Lime pie, Cuban sandwiches
• Milwaukee, WI: Frozen custard
• Mobile, AL: West Indies salad
• Nashville, TN: Ham and red-eye gravy
• New Orleans, LA: Oyster loaf, jambalaya, gumbo, boiled crawfish
• New York, NY: Pastrami sandwich, pizza, bagels
• Philadelphia, PA: Cheese steak sandwich
• Portland, OR: Oyster stew
• San Diego, CA: Fish tacos
• San Francisco, CA: Sourdough bread
• Seattle, WA: Salmon
• Tampa, FL: Cubano (Cuban sandwich)
• Tucson, AZ: Chimichanga

The following are popular regional flavor profiles (source: Nation’s Restaurant News):

**Midwest**
- American cheese
- Cherry
- Corned beef
- Italian beef
- Italian sausage
- Ranch

**South**
- Catfish
- Crawfish
- Key lime pie
- Pecan
- Queso
- Sweet tea

**Northwest**
- Anchovy
- Eggplant
- Ginger ale
- Iced coffee
- Lobster
- Mesclun
- Parmigiana
- Plum tomatoes
- Veal
- Ziti

**West**
- Avocado
- Burrito
- Cabbage
- Cilantro
- Green chile
- Latte
- Sourdough
- Tostada
- Zucchini

### 18.2 Ethnic Cuisine

Global Palates, Ethnic And Flavors In America, published in August 2015 by the National Restaurant Association (www.restaurant.org), reported adult consumption of ethnic and regional cuisine as follows:

<table>
<thead>
<tr>
<th>Cuisine</th>
<th>&gt; Once A Month</th>
<th>A Few Times A Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italian</td>
<td>62%</td>
<td>25%</td>
</tr>
<tr>
<td>Mexican</td>
<td>50%</td>
<td>30%</td>
</tr>
<tr>
<td>Chinese</td>
<td>35%</td>
<td>42%</td>
</tr>
<tr>
<td>Regional American</td>
<td>29%</td>
<td>27%</td>
</tr>
<tr>
<td>Mediterranean</td>
<td>17%</td>
<td>23%</td>
</tr>
<tr>
<td>Sushi/Sashimi</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>Fusion</td>
<td>12%</td>
<td>24%</td>
</tr>
<tr>
<td>Japanese (other than sushi)</td>
<td>12%</td>
<td>27%</td>
</tr>
</tbody>
</table>
• Regional ethnic: 11% 23%
• Spanish: 8% 22%
• Middle Eastern: 8% 35%
• Southeast Asian: 8% 15%
• Belgian: 7% 25%
• Thai: 7% 16%
• German: 6% 30%
• French: 6% 26%
• Vietnamese: 6% 15%
• Greek: 5% 24%
• Indian: 5% 12%
• Latin American/Nuevo Latino: 5% 43%
• Caribbean: 4% 16%
• Korean: 3% 7%
• Russian/Eastern European: 3% 12%
• Peruvian: 2% 10%
• Scandinavian/Nordic: 1% 8%
• Brazilian/Argentine: 1% 7%
• Ethiopian: 1% 1%

Other findings of the study are as follows:
• Italian, Mexican and Chinese are the top three cuisines in terms of familiarity, trial, and frequency of eating.
• Ethiopian, Brazilian/Argentinian, and Korean are the three least known cuisines.
• Cuisines most commonly eaten on-premises in restaurants are sushi, Thai, Vietnamese, Brazilian/Argentinian, Greek, and Southeast Asian.
• Chinese is by far the most common cuisine for restaurant takeout and delivery, followed by Mexican, and Italian.
• Restaurants are the primary point of access for trying new cuisines, as well as the source where frequent eaters typically get their ethnic food.
• Eighty-five percent (85%) of consumers say they prefer to eat ethnic cuisine in a restaurant focused on that cuisine.
• Eighty percent (80%) consumers eat at least one ethnic cuisine per month.
• Seventy-five percent (75%) of consumers say they like it when restaurants with mainstream menus also serve ethnic cuisine.
• Sixty-six percent (66%) of consumers eat a wider variety of ethnic cuisines now than five years ago.
• Fifty-six percent (56%) of consumers customize ethnic cuisine dishes to fit their taste.
• Forty-three percent (43%) of consumers say the ethnic foods they like to eat are tied to their ancestry or heritage.
• Twenty-nine percent (29%) of consumers tried a new ethnic cuisine in the last year.
Twenty-five percent (25%) of consumers like trying unconventional ingredients like snails, brains, or ants.

Seventeen percent (17%) of consumers eat seven or more cuisines on a monthly basis.

“Some of the trendiest cuisines in the United States are still unknown to many Americans who continue to do most of their culinary adventuring within the ‘big three’ cuisines of Italian, Chinese, and Mexican.”

Nation’s Restaurant News, 9/14/15

According to Mintel (www.mintel.com), ethnic foods garner $75 billion annually in the United States. 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 The Harris Poll (www.theharrispoll.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
18.3 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)
19

DAYPARTS

19.1 Daypart Spending and Traffic

According to a May 2015 report by Datassential (www.datassential.com), restaurant sales are distributed by daypart as follows:

- Breakfast: 20%
- a.m. snack: 5%
- Lunch: 38%
- p.m. snack: 7%
- Dinner: 27%
- Late night: 3%

The NPD Group (www.npd.com) assesses the distribution of total restaurant traffic, including takeout and delivery, as follows:

- Breakfast: 21%
- Lunch: 34%
- Dinner: 31%
- 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. Snacks are discussed in Chapter 71 of this handbook.

19.2 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. Breakfast/morning meal visits grew by 5% in the 12-month period ending June 2015.

______________________________________________________________

“Breakfast is the fastest-growing foodservice daypart and is accelerating.”

The NPD Group, 12/21/15
Sixty-three percent (63%) of all restaurants serve breakfast, according to Datassential. By segment, the percentages that do so are as follows:

- Quick-service: 74%
- Fast-casual: 59%
- Casual-dining: 52%
- Fine-dining: 4%

Quick-service restaurants (QSRs) garner 80% of all morning meal visits, according to The NPD Group.

A March 2015 assessment by Sandelman & Associates (www.sandelman.com) reported the breakfast marketshare distribution among QSRs as follows:

- McDonald’s: 29%
- Starbucks: 21%
- Dunkin’ Donuts: 12%
- Carl’s Jr. and Hardee’s: 3%
- Chick-fil-A: 3%
- Taco Bell: 2%
- Subway: 2%

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 items consumed at breakfast are as follows (source: Datassential):

<table>
<thead>
<tr>
<th>Pct. Who Have Eaten In Past 2 Weeks</th>
<th>At Home</th>
<th>Away From Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cold cereal: 23%</td>
<td>94%</td>
<td>6%</td>
</tr>
<tr>
<td>Eggs: 23%</td>
<td>77%</td>
<td>23%</td>
</tr>
<tr>
<td>Breakfast sandwich: 11%</td>
<td>52%</td>
<td>48%</td>
</tr>
<tr>
<td>Bacon: 11%</td>
<td>73%</td>
<td>27%</td>
</tr>
<tr>
<td>Sausage: 10%</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>Yogurt: 10%</td>
<td>86%</td>
<td>14%</td>
</tr>
<tr>
<td>Oatmeal: 10%</td>
<td>90%</td>
<td>10%</td>
</tr>
<tr>
<td>Fruit/fruit cup: 9%</td>
<td>85%</td>
<td>15%</td>
</tr>
<tr>
<td>Pancakes: 9%</td>
<td>65%</td>
<td>35%</td>
</tr>
<tr>
<td>Bagel: 9%</td>
<td>81%</td>
<td>19%</td>
</tr>
</tbody>
</table>
Breakfast potatoes: 7% 53% 47%
Omelet: 6% 67% 33%
French toast: 6% 77% 23%
Waffles: 6% 75% 25%
Muffin: 5% 73% 27%

19.3 Lunch

Lunch accounts for 34% of restaurant visits. According to The NPD Group, lunch visits to restaurants increased 1% year-over-year in the 12-month period ending June 2015.

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%

The NPD Group reports that 60% of all lunches are prepared at home. Another 32% of lunch meals are eaten at school or work, as takeout, eaten on-the-run, or skipped altogether. Only 8% of lunch meals are eaten at a restaurant.

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.

“Once upon a time, visiting a restaurant [for lunch] meant an hour break from work, and for some it stretched to making deals over three martinis. Today, the reality lies in stark contrast.”

Nation’s Restaurant News, 12/8/15

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%
• All other: 22%

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 lower calorie meals being the most sought after for lunch.

19.4 Dinner

Second only to lunchtime restaurant visits, dinner accounts for 31% of patronage at restaurants. Year-over-year visits, however, have been on the decline for several years. The NPD Group reported that visits to restaurants for dinner dropped 2% year-over-year in the 12-month period ending June 2015.

*National Eating Trend*, by The NPD Group, found the dinner daypart suffered a per capita drop of 15 fewer restaurant dinners compared to in-home suppers over the past decade.

Dinner accounts for 27% of restaurant sales. But the percentage varies by sector. The daypart accounts for slightly over one-half of casual-dining sales and 64% of fine-dining sales, according to Datassential.

The distribution of restaurant traffic for the dinner daypart, by customer age, is as follows (source: The NPD Group):

<table>
<thead>
<tr>
<th>Supper Meal Occasions</th>
<th>Share of Traffic</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-to-31:</td>
<td>66</td>
</tr>
<tr>
<td>32-to-43:</td>
<td>63</td>
</tr>
<tr>
<td>44-to-51:</td>
<td>60</td>
</tr>
<tr>
<td>52-to-61:</td>
<td>56</td>
</tr>
<tr>
<td>62 and older:</td>
<td>49</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Supper Meal Occasions</th>
<th>Share of Traffic</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-to-31:</td>
<td>66</td>
</tr>
<tr>
<td>32-to-43:</td>
<td>63</td>
</tr>
<tr>
<td>44-to-51:</td>
<td>60</td>
</tr>
<tr>
<td>52-to-61:</td>
<td>56</td>
</tr>
<tr>
<td>62 and older:</td>
<td>49</td>
</tr>
</tbody>
</table>

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*, a report by The NPD Group. 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 loses 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%

Technomic 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.

19.5 Late-Night

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.

According to Technomic, 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%

At under 5% of restaurant visits, the late-hour daypart presents opportunities for innovative operators.
20

MEALPARTS

20.1 Overview

Restaurant meals are generally assessed as six mealparts, plus beverages. According to Datassentials (www.datassentials.com), food costs as a percentage of mealpart price are as follows:

- Entrees: 41%
- Appetizers: 29%
- Desserts: 29%
- Beverages: 28%
- Salads: 27%
- Sides: 27%
- Soups: 27%

“Food costs are the highest for entrees at 41%, which is not surprising considering these are often protein heavy dishes. Desserts and appetizers follow, with their food costs accounting for 31% and 29% of revenue, respectively, which means operators may be looking for ways to turn over these menu categories more quickly in order to move inventory and minimize costly waste. Menu categories with lower food costs, such as sides, soups, and salads, meanwhile, could be profit boosters for operators.”

Datassentials, 5/15

This chapter assesses the six primary mealparts. Beverages are assessed in Part XI of this handbook.
20.2 Appetizers

In an October 2015 survey by Technomic (www.technomic.com), 39% of adults said they order appetizers on all or most of their restaurant visits. Fifty-nine percent (59%) say they tend to eat items labeled as “appetizers” as starters to their meals. Eighty-five percent (85%) of all restaurants serve appetizers, according to Datassential. By segment, the percentages that do so are as follows:

- Casual-dining: 97%
- Fine-dining: 97%
- Quick-service: 70%
- Fast-casual: 60%

The most popular appetizers are as follows (source: Datassential):

<table>
<thead>
<tr>
<th>Pct. Who Have Eaten</th>
<th>At Home</th>
<th>Away From Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Past 2 Weeks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fries, potato skins</td>
<td>10%</td>
<td>31%</td>
</tr>
<tr>
<td>Chips &amp; salsa</td>
<td>9%</td>
<td>20%</td>
</tr>
<tr>
<td>Wings</td>
<td>8%</td>
<td>33%</td>
</tr>
<tr>
<td>Onion rings</td>
<td>7%</td>
<td>21%</td>
</tr>
<tr>
<td>Fried cheese sticks</td>
<td>6%</td>
<td>31%</td>
</tr>
<tr>
<td>Nachos</td>
<td>6%</td>
<td>39%</td>
</tr>
<tr>
<td>Dip (spinach, taco, etc.)</td>
<td>5%</td>
<td>43%</td>
</tr>
<tr>
<td>Shrimp cocktail</td>
<td>5%</td>
<td>12%</td>
</tr>
<tr>
<td>Spring/egg rolls</td>
<td>4%</td>
<td>13%</td>
</tr>
<tr>
<td>Quesadilla</td>
<td>4%</td>
<td>59%</td>
</tr>
<tr>
<td>Chicken strips</td>
<td>4%</td>
<td>35%</td>
</tr>
<tr>
<td>Hummus</td>
<td>3%</td>
<td>56%</td>
</tr>
<tr>
<td>Calamari</td>
<td>3%</td>
<td>13%</td>
</tr>
<tr>
<td>Cheese ball/cubes/slices</td>
<td>3%</td>
<td>73%</td>
</tr>
<tr>
<td>Guacamole</td>
<td>3%</td>
<td>64%</td>
</tr>
</tbody>
</table>

When restaurant patrons were asked in a survey by Datassential the most important attributes in choosing a restaurant appetizer, responses were as follows:

- Great taste: 84%
- Best value: 72%
- Quality of appetizer options: 72%
- Cost: 72%
- Visually appealing: 69%
- Unique appetizers not generally prepared at home: 61%
- Speed of service: 59%
- Shareable with a group: 55%
- Healthier options: 53%
- Non-fried, non-greasy options: 52%
- Large appetizer portions: 49%
20.3 Dessert

According to The NPD Group (www.npd.com), 10.4% of meals ordered at restaurants include dessert.

Ninety-one percent (91%) of all restaurants serve dessert, according to Datassential. By segment, the percentages that do so are as follows:

- Fine-dining: 99%
- Casual-dining: 96%
- Quick-service: 84%
- Fast-casual: 87%

The average number of dessert items on menus in 2015 was as follows (source: Datassential):
- Quick-service: 11.3
- Fast-casual: 10.4
- Fine-dining: 9.3
- Casual-dining: 8.3

2015 Dessert Consumer Trend Report, by Technomic, reported the most preferred desserts at restaurants as follows (percentage of adults who would order):
- Brownies: 67%
- Apple pie: 65%
- Chocolate cake: 59%

Technomic provides 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-four percent (34%) 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.
- Fifty-eight percent (58%) of desserts are purchased on impulse.
20.4 Entrees

The entree, or center-of-the-plate, typically presents a restaurant’s signature cuisine. The following are the most ordered dishes at some chain restaurants:

• Applebee’s Neighborhood Grill & Bar: House Sirloin
• Boston Market: Rotisserie Chicken
• California Pizza Kitchen: Original BBQ Chicken Pizza
• Carl’s Jr.: Western Bacon Cheeseburger
• Denny’s: Grand Slam
• Friendly’s: Honey BBQ Supermelt
• Olive Garden: Chicken Alfredo
• Red Lobster: Ultimate Feast
• Red Robin Gourmet Burgers: Red’s Tavern Double

Small plates are increasingly popular at restaurants. In an October 2015 survey by Technomic, 30% of adults said they order small plates at most of their restaurant visits. Groups often share several small plates to sample various items from a restaurant’s menu. Small plates are also a way diners can practice portion-control.

The popularity of bowl meals is also on the rise. Datassentials reported bowl meals have increased 5.6% on quick-service restaurant menus in the past four years. Chipotle Mexican Grill announced in 2015 that the chain now sells more bowls than burritos.

20.5 Salads

In a survey by Technomic, 76% of adults say they order salad at restaurants at least some of the time. Forty-nine percent (49%) of women and 36% of men 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.

The following are the primary reasons customers purchase salads at restaurants (percentage of respondents; up to three selections allowed):

• Healthful option: 53%
• Just in the mood to order it: 46%
• Good overall value: 27%
• Affordable: 24%
• Want to try new/unique varieties: 21%

Datassential reported the growth of various ingredients in salads on restaurant menus in 2015 compared with two years prior as follows:

• Kale: 248%
• Quinoa: 116%
• Beets: 52%
• Aioli: 42%
“Salad can no longer be an afterthought – not anywhere. Sports bars, steakhouses, and quick-service burger chains have left behind the iceberg lettuce and bland tomatoes as their guests demand variety, flavor, and, increasingly, seasonality.”

Nation’s Restaurant News, 8/10/15

20.6 Sides

In an October 2015 survey by Technomic, 53% of adults said they order sides on all or most of their restaurant visits.

Fifty-nine percent (59%) of adults said they often choose entrees based on the sides that come with a meal; 46% said they are less likely to order an entree if it comes with a side they don’t like.

Technomic reported in 2015 that the fastest-growing sides at limited-service restaurants are non-breaded vegetables, deli salads, fruit, and beans. Pasta/noodles, potato dishes (au gratin, hash browns, home fries, tater tots, etc.), fruit, and rice are rising in popularity at full-service restaurants.

“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
20.7 Soups

In a survey by Technomic, 55% of adults say they order soup at restaurants at least some of the time. Fifty percent (50%) of women and 41% of men say they visit certain restaurants because they enjoy their soup offerings. Fifty-eight percent (58%) of restaurant patrons say they are more likely to order soup as a combo-meal item than as a single item.

The following are the primary reasons customers purchase soup at restaurants (percentage of respondents; up to three selections allowed):

- Just in the mood to order it: 51%
- Good overall value: 35%
- Want to try new/unique varieties: 35%
- Healthful option: 31%
- Affordable: 27%

Datassential reported soup offerings on full-service restaurant menus as follows:

- Tortilla: 11.9%
- Bisque: 6.7%
- Tomato soup: 5.5%
- Lentil: 5.3%
- Miso: 5.3%
- Gumbo: 4.2%
- Italian wedding: 2.5%
- Tofu: 2.5%
- Pea: 2.4%
- Tom kai: 2.3%
- Broccoli cheese: 1.8%
- Mushroom: 1.7%

_________________________________________________________________

“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
21

MENU ITEMS

21.1 Beef & Pork

According to the USDA, beef and pork consumption were 54.3 pounds and 49.7 pounds per capita, respectively, in 2015. Per capita beef consumption decreased 17.4% during the 2006-2015 decade; pork consumption increased 1.4%.

Beef represents 31% of the total foodservice protein market; pork represents about 27%.

2015 Center of the Plate: Beef & Pork Consumer Trend Report, by Technomic (www.technomic.com), reported that among adults who eat red meat, 91% eat beef as a center-of-the-plate item at least weekly; 66% eat pork at least weekly.

The National Cattlemen’s Beef Association (www.beef.org) reports beef sales at restaurants and foodservice establishments as follows:

- 2010: 8.0%
- 2011: 7.9%
- 2012: 8.0%
- 2013: 8.7%
- 2014: 7.9%

According to Technomic, the top-selling cuts of beef in the foodservice market are follows:

- Ground beef: 5.10 billion pounds
- Sirloin steak: 244 million pounds
- Tenderloin roast: 221 million pounds
- Prime rib: 190 million pounds
- Rib-eye steak: 180 million pounds
- Tenderloin filet: 163 million pounds

_________________________________________________________________

“Beef is expensive and expected to remain so, but Americans still love it. They’re eating more hamburgers than ever and buying more premium steak.”

Nation’s Restaurant News, 3/23/15

_________________________________________________________________
The increased consumption in pork is, in part, to its growing use in sandwiches. Datassential (www.datassential.com) reported that in 2015, pork was featured on 27% of all restaurant menus that feature sandwiches.

“The variety of cuts and the versatility of pork inspired chefs across all segments to put everything from barbecue pulled pork and roast pork shoulder to house-cured pork pastrami and pork schnitzel between two pieces of bread.”

*Nation’s Restaurant News, 12/10/15*

Americans eat more than 1.1 billion servings of bacon each year, according to The NPD Group (www.npd.com). The distribution by daypart is as follows:

- Breakfast: 83%
- Lunch: 9%
- Dinner: 6%
- Snacks: 2%

**21.2 Bread**

In April 2015, Datassential reported the increase of bread varieties on restaurant menus during the prior 12-month period as follows:

- Artisanal: 32.9%
- Pretzel: 27.2%
- Brioche: 20.5%
- Lavash: 20.4%
- Bao: 13.1%
- Cracked wheat: 12.1%
- Challah: 11.3%
- Country bread: 11.3%
- Crostini: 8.2%
- Buttermilk biscuit: 8.2%
“With many Americans now avoiding gluten, and a growing number of people eschewing most carbohydrates as they follow the paleo diet, bread is less of a meal staple and more of an indulgence. Consumers are also more sophisticated and discriminating, so when they do decide to have bread, they want it to be something special.”

*Nation’s Restaurant News, 4/13/15*

### 21.3 Breakfast All Day

While many family-dining restaurants have long offered some breakfast items on their menu all day long, this is rare among quick-service and casual-dining restaurants.

“Breakfast is a popular daypart, and consumers want those products available all the time. More than 70% of consumers in various polls say they want breakfast items available at lunch and dinner.”

*Nation’s Restaurant News, 9/14/15*

In September 2015, McDonald’s announced the rollout of all-day breakfast service. A December 2015 assessment by The NPD Group found orders of breakfast foods throughout the day increased to 47% post-launch.
“Our preliminary review of McDonald’s all-day breakfast offer suggests consumers are receptive to ordering McDonald’s breakfast foods beyond traditional breakfast hours.”

Bonnie Riggs, Analyst
The NPD Group, 12/9/15

### 21.4 Burgers

According to The NPD Group, 8.9 billion hamburgers are sold at restaurants each year. 

*2015 Burger Consumer Trend Report*, by Technomic, reported that 57% of adults eat a burger at least once a week. Among these people, burgers are consumed as follows:

- Quick-service restaurants: 39%
- At home: 37%
- Fast-casual restaurants: 16%

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 Smashburger, 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):

<table>
<thead>
<tr>
<th></th>
<th>Quick-Service</th>
<th>Full-Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large cheeseburger:</td>
<td>43%</td>
<td>17%</td>
</tr>
<tr>
<td>Regular cheeseburger:</td>
<td>20%</td>
<td>24%</td>
</tr>
<tr>
<td>Bacon cheeseburger:</td>
<td>16%</td>
<td>25%</td>
</tr>
<tr>
<td>Regular hamburger:</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td>Large hamburger:</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Miniature hamburger:</td>
<td>2%</td>
<td>11%</td>
</tr>
</tbody>
</table>
According to Datassential, 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.

According to the 2015 Burger Consumer Trend Report, the following are the fastest-growing burgers on restaurant menus (percent menu listing change in prior 12-month period):

**Limited-Service Restaurants**
- Chicken: 23%
- Barbecue: 14%
- Veggie: 10%

**Full-Service Restaurants**
- Build-you-own: 28%
- Turkey: 15%
- Veggie: 13%

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“While the restaurant industry continues to face stagnant guest traffic, one menu item is sure to drive customers through the door – the hamburger.”

*Nation’s Restaurant News, 10/6/15*

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### 21.5 Cake & Pie

The most popular cakes are as follows (source: Datassential):

<table>
<thead>
<tr>
<th>Cake Type</th>
<th>Pct. Who Have Eaten In Past 2 Weeks</th>
<th>At Home</th>
<th>Away From Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chocolate cake</td>
<td>26%</td>
<td>65%</td>
<td>35%</td>
</tr>
<tr>
<td>Yellow cake</td>
<td>9%</td>
<td>72%</td>
<td>28%</td>
</tr>
<tr>
<td>White cake</td>
<td>8%</td>
<td>69%</td>
<td>31%</td>
</tr>
<tr>
<td>Carrot cake</td>
<td>7%</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Red velvet cake</td>
<td>7%</td>
<td>48%</td>
<td>52%</td>
</tr>
<tr>
<td>Cupcake</td>
<td>6%</td>
<td>62%</td>
<td>38%</td>
</tr>
<tr>
<td>Lemon cake</td>
<td>5%</td>
<td>81%</td>
<td>19%</td>
</tr>
<tr>
<td>Pound cake</td>
<td>4%</td>
<td>85%</td>
<td>15%</td>
</tr>
<tr>
<td>Pumpkin cake</td>
<td>4%</td>
<td>58%</td>
<td>42%</td>
</tr>
<tr>
<td>Banana cake</td>
<td>3%</td>
<td>71%</td>
<td>29%</td>
</tr>
<tr>
<td>Coconut cake</td>
<td>3%</td>
<td>59%</td>
<td>41%</td>
</tr>
</tbody>
</table>
• Apple cake: 3% 75% 25%
• Caramel cake: 2% 72% 28%
• Marble cake: 2% 89% 11%
• Black forest cake: 2% 35% 65%
• Angel food cake: 2% 94% 6%
• Pineapple cake: 2% 67% 33%
• Other cake: 4% 67% 33%

According to Datassential, apple pie is the top menued variety at restaurants, followed by key lime, pecan, and lemon. Several new pie trends increased on restaurant menus in 2015, from fillings like cranberry (up 128% in menu listings) to extensions like crostatas (up 64%). The influence of Southern cuisine continues to impact menus as well, with buttermilk growing 96% on pie menus in 2015, with options like buttermilk custard, buttermilk chess pie, or à la mode options served with buttermilk ice cream.

“Cupcakes, cake pops, and other trendy treats come and go on restaurant dessert menus, but pie is a mainstay.”

Nation’s Restaurant News, 11/16/15

21.6 Chicken

Americans buy more chicken than any other center-of-the-plate food. Chicken consumption per capita has increased nearly every year since the mid 1960’s, while red meat consumption has steadily declined.

According to the USDA, chicken consumption was 90.1 pounds per capita in 2015, a figure that is projected to rise to 91.4 pounds in 2016. Per capita chicken consumption increased 3.7% during the 2006-2015 decade.

U.S. chicken production in 2015 was 39.2 billion pounds in 2015, an all-time record and 2.7% higher than the output in 2014.

Chicken wings are exceedingly popular in restaurants, especially as a takeout item. According to GrubHub (www.grubhub.com), an online food ordering company with 30,000 restaurants in its network and more than 4 million active diners, wings are the top dish ordered nationally, ahead of pizza and burgers.
“Once predominantly the favorite food of sports fans, extreme spice lovers and competitive eaters, chicken wings have become America’s favorite takeout food.”

Nation’s Restaurant News, 12/8/15

The increased consumption of chicken wings is, in part, because more restaurants are selling them. Pizza chains including Pizza Hut and Little Caesars, for example, now serve wings. FRANdata (www.frandata.com) reports that the number of U.S. chicken-wing franchises increased 7% in 2015 compared with 2011, to more than 2,000 restaurants.

The National Chicken Council (www.nationalchickencouncil.org) estimated that Americans consumed 1.25 billion wings on Super Bowl Sunday in 2015.

21.7 Fried Foods

The word “fried” appears on 73% of the more than 93,000 restaurant menus tracked by data analysis company Food Genius (www.getfoodgenius.com). Among restaurants including ‘fried’ on their menu, 44% are fast-casual restaurants, 28% are casual-dining restaurants, and 27% are quick-service restaurants.

“Americans love fried food, and eat a lot of it. Fried food is trendy, too. Restaurants take a variety of approaches to frying, particularly when it comes to the type of fat used. Some use high-performance oils that will last a long time. Others lean more toward fats with flavors that they like, or they pick and choose oils depending on what food will be fried. And some split the difference, blending high-performance oils with those with preferred flavors.”

Nation’s Restaurant News, 8/24/15
21.8 Fries

Adults eat approximately 29 pounds of french fries per year. Fries are so popular that potatoes account for one-third of all vegetables consumed by Americans, according to the U.S. Department of Agriculture (www.usda.com) – over 50% of potato sales are to processors for french fries and chips. Ninety percent (90%) of french fries get sold in quick-service restaurants.

The popularity of topped fries on restaurant menus is on the rise. Poutine, a specialty from the Canadian province of Québec comprised of fries, cheese curds, and a fairly acidic gravy, appeared on 468% more menus in the United States in 2015 than it did four years prior, according to Datassential.

2015 Datassential Menu Trends reports the top ingredients served with fries are as follows (percent of menus featuring each ingredient):

- Cheese: 28.1%
- Bacon: 12.1%
- Cheddar: 11.3%
- Garlic: 6.5%
- Onion: 5.6%
- Parmesan: 5.4%
- Sour cream: 4.0%
- Truffle: 3.5%
- Mozzarella: 3.2%
- Gravy: 3.1%

“Take America’s favorite side dish, put things like bacon, cheese and gravy on top, and you have one of the country’s hottest food trends. Whether you call them disco fries, chili-cheese fries, loaded fries, poutine, or anything else that implies fried potatoes with stuff on top, customers are clamoring for them.”

Nation’s Restaurant News, 10/26/15

21.9 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 2015 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 (a.k.a. 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

### 21.10 Pizza

According to the National Association of Pizzeria Operators (NAPO, www.pizzatoday.com/napo/national-association-for-pizzeria-operators), over three billion pizzas were sold in the United States in 2015. American adults and children eat
an average of 46 slices, or 23 pounds, of pizza a year.

According to the U.S. Department of Agriculture (USDA, www.usda.gov), one in eight American adults eats pizza on any given day, and of those adults, white males eat the most. Overall, however, more children eat pizza than adults. Forty-four percent (44%) of the time that kids eat pizza, it’s for lunch, while 59% of the time that adults eat pizza, it’s for dinner.

So popular is pizza that 25% of the nation’s cheese is used on pizza. Eighty-five percent (85%) of pizza today is consumed at home as families turn to the convenience of delivery and carry out to share family meals.

Online ordering and increased use of mobile devices is changing ordering patterns for pizza delivery outlets. Of pizzas sold by restaurants, 53% are taken to-go and 28% are delivered, according to Datassential; only 19% are eaten in the restaurant. Restaurant’s 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 have declined at about 4.5% per year since 2011.

According to Datassential, the following were the most popular types of pizza in 2015 (percent of people who have eaten in past two weeks):

- Pepperoni: 40%
- Sausage: 16%
- Meat lovers: 16%
- Supreme: 15%
- Cheese: 8%
- Vegetarian: 7%
- Hawaiian: 7%
- White pizza: 5%
- BBQ chicken: 5%
- Margherita: 4%
- Mexican: 3%
- Buffalo chicken: 3%
- California style: 3%
- Meatball: 3%
- Sicilian: 3%

Pizza Lovers in America 2015, a July 2015 study by the Center for Generational Kinetics (www.genhq.com) and Smart Flour Foods (www.smartflourfoods.com), reported that 35% of Americans both go out for pizza and buy frozen pizza at a retail store every month. Characteristics of these consumers, dubbed ‘pizza lovers’ are as follows:

- Seventy-eight percent (78%) prefer soft drinks rather than beer with their pizza.
- Sixty-eight percent (68%) of all pizza lovers exercise two or more times per week.
- Sixty-three percent (63%) of pizza lovers in the U.S. are women; 41% of those women are Millennials.
- Sixty percent (60%) look to avoid products that contain synthetic hormones, high fructose corn syrup, trans fat, and artificial preservatives.
• Fifty-nine percent (59%) are age 35 or older.
• Among pizza lovers age 35 and younger, 38% view gluten-free options as important; 26% of those older than 35 hold this view. Thirty-eight percent (35%) of younger consumers look for non-dairy pizza options compared with 19% of older consumers who do so.
• Sixty-four percent (64%) of those age 35 and younger want calorie information, and 61% are interested in the fat content of pizza. Among those older than 35, these figures are 49% and 50%, respectively.
• Fifty-two percent (52%) of younger consumers are interested in organic ingredients; 37% of older consumers have this interest.

21.11 Sandwiches

According to The NPD Group, Americans consumed 12.5 billion sandwiches in restaurants in 2015. Including takeout and delivery sandwiches, burgers, and wraps increases the total to about 22 million.

According to the Sandwich Consumer Trend Report, published by Technomic, 96% of consumers purchase sandwiches at least once a week; 59% say they eat at least three sandwiches a week. Including sandwiches made and eaten at home, Technomic puts annual sandwich consumption in the U.S. at about 60 billion.

Datassential found that consumers eat different types of sandwiches at home than they do at restaurants. More than three-quarters of ham and turkey sandwiches are prepared and eaten cold, at home, while 57% of chicken sandwiches are warm and purchased away from home.

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.

“No meal is more central to the American diet than the sandwich. Portable, convenient, and eminently customizable, it fits the needs of the modern consumer.”

Nation’s Restaurant News, 12/8/15

The most popular sandwiches in 2015 were as follows (source: Datassential):
<table>
<thead>
<tr>
<th></th>
<th>Pct. Who Have Eaten In Past 2 Weeks</th>
<th>At Home</th>
<th>Away From Home</th>
<th>Hot</th>
<th>Cold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turkey:</td>
<td>14%</td>
<td>77%</td>
<td>22%</td>
<td>18%</td>
<td>81%</td>
</tr>
<tr>
<td>Ham:</td>
<td>11%</td>
<td>82%</td>
<td>18%</td>
<td>15%</td>
<td>85%</td>
</tr>
<tr>
<td>Chicken:</td>
<td>9%</td>
<td>43%</td>
<td>57%</td>
<td>63%</td>
<td>37%</td>
</tr>
<tr>
<td>Sub:</td>
<td>8%</td>
<td>23%</td>
<td>77%</td>
<td>29%</td>
<td>71%</td>
</tr>
<tr>
<td>Deli sandwich:</td>
<td>6%</td>
<td>83%</td>
<td>17%</td>
<td>10%</td>
<td>90%</td>
</tr>
<tr>
<td>PBJ:</td>
<td>5%</td>
<td>100%</td>
<td>0%</td>
<td>4%</td>
<td>96%</td>
</tr>
<tr>
<td>BLT:</td>
<td>5%</td>
<td>70%</td>
<td>30%</td>
<td>42%</td>
<td>58%</td>
</tr>
<tr>
<td>Grilled cheese:</td>
<td>5%</td>
<td>94%</td>
<td>6%</td>
<td>94%</td>
<td>6%</td>
</tr>
<tr>
<td>Roast beef:</td>
<td>4%</td>
<td>50%</td>
<td>50%</td>
<td>32%</td>
<td>68%</td>
</tr>
<tr>
<td>Club:</td>
<td>3%</td>
<td>46%</td>
<td>54%</td>
<td>15%</td>
<td>85%</td>
</tr>
<tr>
<td>Pastrami/corned beef:</td>
<td>2%</td>
<td>45%</td>
<td>55%</td>
<td>55%</td>
<td>45%</td>
</tr>
<tr>
<td>Steak:</td>
<td>2%</td>
<td>33%</td>
<td>67%</td>
<td>94%</td>
<td>6%</td>
</tr>
<tr>
<td>Wrap:</td>
<td>2%</td>
<td>50%</td>
<td>50%</td>
<td>22%</td>
<td>78%</td>
</tr>
<tr>
<td>Vegetable:</td>
<td>2%</td>
<td>73%</td>
<td>27%</td>
<td>47%</td>
<td>53%</td>
</tr>
</tbody>
</table>

### 21.12 Seafood

According to the USDA, commercial fish and shellfish consumption was 14.2 pounds per capita in 2014 (most recent data available). Per capita seafood consumption decreased 13.9% during the 2005-2014 decade.

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.

The NPD Group estimates that 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%

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.

*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.

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.

Use of farm-raised fish is another tactic. Though catfish, tilapia, salmon, and shrimp have dominated aquaculture for years, 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 selections only seasonally. Chefs are avoiding spawning times, for example, to protect juvenile fish.
PART V: CITY-BY-CITY ANALYSIS
22

DINING OUT

22.1 Restaurant Visits

International Demographics (www.themediaaudit.com) regularly surveys residents in 84 metropolitan areas on various topics, including dining out. This chapter presents dining frequency data for full-service and quick-service restaurants.

22.2 Full-Service Restaurant Visits

Across all metropolitan areas, International Demographics found that 12.2% of adults dine out at full-service restaurants two or more times per week.

The following percentages of adults dine at full-service restaurants, on average, two or more times per week:

- Akron, OH: 14.6%
- Albany-Schenectady, NY: 6.2%
- Albuquerque, NM: 11.4%
- Allentown-Bethlehem, PA: 8.3%
- Ann Arbor, MI: 8.9%
- Atlanta, GA: 15.0%
- Austin, TX: 15.8%
- Baltimore, MD: 7.6%
- Birmingham, AL: 13.6%
- Boise, ID: 7.6%
- Boston, MA: 10.5%
- Buffalo, NY: 10.4%
- Champaign, IL: 14.9%
- Charleston, SC: 6.9%
- Charleston/Huntington, WV: 10.5%
- Charlotte, NC: 13.7%
- Chicago, IL: 12.7%
- Cincinnati, OH: 12.7%
- Cleveland, OH: 11.3%
- Colorado Springs, CO: 7.5%
- Columbia, SC: 16.0%
- Columbia-Jefferson City, MO: 11.0%
- Columbus, OH: 10.3%
- Dallas-Ft. Worth, TX: 16.0%
- Dayton, OH: 11.7%
- Denver, CO: 8.1%
- Des Moines, IA: 14.2%
- Detroit, MI: 12.5%
- Eugene-Springfield, OR: 7.9%
- Ft. Myers-Naples, FL: 17.9%
- Grand Rapids, MI: 8.3%
- Greensboro, NC: 17.5%
- Greenville-Spartanburg, SC: 16.4%
- Houston, TX: 11.6%
- Indianapolis, IN: 13.2%
- Jacksonville, FL: 10.3%
- Kansas City, MO: 10.2%
- Las Vegas, NV: 15.1%
- Lexington, KY: 13.0%
- Little Rock, AR: 10.1%
- Los Angeles, CA: 12.6%
- Louisville, KY: 11.2%
- Madison, WI: 9.2%
- Melbourne-Cocoa, FL: 16.0%
- Memphis, TN: 12.7%
- Miami-Ft. Lauderdale, FL: 13.3%
22.3 Quick-Service Restaurant Visits

Across all metropolitan areas, International Demographics found that, on average, adults visit quick-service restaurants 2.56 times per week.

The following are the average number of weekly quick-service restaurant purchases among residents of various metropolitan areas:

- Akron, OH: 2.35
- Albany-Schenectady, NY: 2.13
- Albuquerque, NM: 2.25
- Allentown-Bethlehem, PA: 1.64
- Ann Arbor, MI: 2.52
- Atlanta, GA: 3.11
- Austin, TX: 2.66
- Baltimore, MD: 2.58
- Birmingham, AL: 2.79
- Boise, ID: 2.15
- Boston, MA: 2.05
- Buffalo, NY: 1.78
- Champaign, IL: 1.98
- Charleston, SC: 2.36
- Charleston/Huntington, WV: 2.80
- Charlotte, NC: 2.78
- Chicago, IL: 2.68
- Cincinnati, OH: 2.66
- Cleveland, OH: 2.30
- Colorado Springs, CO: 2.29
- Columbia, SC: 2.56
- Columbia-Jefferson City, MO: 2.58
- Columbus, OH: 2.39
- Dallas-Ft. Worth, TX: 3.13
- Dayton, OH: 2.84
- Denver, CO: 2.38
- Des Moines, IA: 3.16
- Detroit, MI: 2.66
- Eugene-Springfield, OR: 2.39
- Ft. Myers-Naples, FL: 2.84
- Grand Rapids, MI: 2.13
- Greensboro, NC: 3.40
- Greenville-Spartanburg, SC: 2.82
- Houston, TX: 2.71
- Indianapolis, IN: 3.07
- Jacksonville, FL: 3.12
<table>
<thead>
<tr>
<th>City</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kansas City, MO</td>
<td>2.61</td>
</tr>
<tr>
<td>Las Vegas, NV</td>
<td>2.60</td>
</tr>
<tr>
<td>Lexington, KY</td>
<td>3.26</td>
</tr>
<tr>
<td>Little Rock, AR</td>
<td>2.80</td>
</tr>
<tr>
<td>Los Angeles, CA</td>
<td>2.78</td>
</tr>
<tr>
<td>Louisville, KY</td>
<td>3.15</td>
</tr>
<tr>
<td>Madison, WI</td>
<td>2.20</td>
</tr>
<tr>
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<td>2.22</td>
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<td>San Jose, CA</td>
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<td>Seattle-Tacoma, WA</td>
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<td>Tulsa, OK</td>
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<td>Washington, DC</td>
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</tr>
<tr>
<td>West Palm Beach, FL</td>
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</table>

### 22.4 Market Resources
International Demographics, 10333 Richmond Avenue, Suite 200, Houston, TX 77042. (713) 626-0333. [www.themediaaudit.com](http://www.themediaaudit.com)
RESTAURANT SALES

23.1 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 551 μSAs.
Combined, there are 917 MSAs and μSAs.

23.2 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, August 2015):

<table>
<thead>
<tr>
<th>Restaurant Sales</th>
<th>Restaurant Sales As Percent Of Income</th>
<th>Number of Restaurants</th>
<th>Sales Per Restaurant</th>
</tr>
</thead>
<tbody>
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<td>Aberdeen, SD:</td>
<td>$1,997</td>
<td>6.55%</td>
<td>132</td>
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<tr>
<td>Aberdeen, WA:</td>
<td>$1,386</td>
<td>6.29%</td>
<td>217</td>
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<td>Abilene, TX:</td>
<td>$1,757</td>
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<td>Ada, OK:</td>
<td>$1,743</td>
<td>7.61%</td>
<td>123</td>
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<tr>
<td>Adrian, MI:</td>
<td>$1,097</td>
<td>5.13%</td>
<td>165</td>
</tr>
<tr>
<td>Akron, OH:</td>
<td>$1,535</td>
<td>5.47%</td>
<td>1,445</td>
</tr>
<tr>
<td>Alamagordo, NM:</td>
<td>$1,746</td>
<td>7.95%</td>
<td>183</td>
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<tr>
<td>Albany, GA:</td>
<td>$1,715</td>
<td>8.36%</td>
<td>342</td>
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<tr>
<td>Albany, OR:</td>
<td>$1,126</td>
<td>5.54%</td>
<td>235</td>
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<tr>
<td>Albany-Schenectady-Troy, NY:</td>
<td>$2,253</td>
<td>6.86%</td>
<td>2,226</td>
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<td>Albermarle, NC:</td>
<td>$1,519</td>
<td>7.61%</td>
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<tr>
<td>Albert Lea, MN:</td>
<td>$1,950</td>
<td>7.19%</td>
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<tr>
<td>Albertville, AL:</td>
<td>$1,378</td>
<td>6.50%</td>
<td>197</td>
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<tr>
<td>Albuquerque, NM:</td>
<td>$1,811</td>
<td>7.05%</td>
<td>1,904</td>
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<tr>
<td>Alexandria, LA:</td>
<td>$1,972</td>
<td>9.65%</td>
<td>371</td>
</tr>
<tr>
<td>Alexandria, MN:</td>
<td>$2,731</td>
<td>8.93%</td>
<td>134</td>
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<tr>
<td>Alice, TX:</td>
<td>$1,524</td>
<td>6.66%</td>
<td>104</td>
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<tr>
<td>Allentown-Bethlehem, PA-NJ:</td>
<td>$1,426</td>
<td>5.09%</td>
<td>1,842</td>
</tr>
<tr>
<td>City</td>
<td>Total Sales</td>
<td>Revenue Growth</td>
<td>Yearly Change</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------</td>
<td>----------------</td>
<td>---------------</td>
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<tr>
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<td>4.79%</td>
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<td>Altoona, PA</td>
<td>$1,913</td>
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<td>Amarillo, TX</td>
<td>$1,833</td>
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<td>$1,580</td>
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<td>$1,331</td>
<td>5.62%</td>
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<td>Anchorage, AK</td>
<td>$2,824</td>
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<td>1,272</td>
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<td>$2,160</td>
<td>7.19%</td>
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<td>$2,036</td>
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<td>$1,622</td>
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<td>$969</td>
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<td>Arkansas City-Winfield, KS</td>
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<td>12.10%</td>
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<td>$1,373</td>
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<td>$3,677</td>
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<td>Baraboo, WI</td>
<td>$2,881</td>
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<td>Location</td>
<td>Median Food Bill</td>
<td>Average Food Bill</td>
<td>Average Food Bill % Change</td>
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<td>Bartlesville, OK</td>
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<td>Bastrop, LA</td>
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<td>Baton Rouge, LA</td>
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<td>Beatrice, NE</td>
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<td>Bellefontaine, OH</td>
<td>$1,312</td>
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<tr>
<td>Bennettsville, SC</td>
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<td>Bennington, VT</td>
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<td>6.86%</td>
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<tr>
<td>Berlin, NH-VT</td>
<td>$5,225</td>
<td>22.23%</td>
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<td>Big Rapids, MI</td>
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<td>9.96%</td>
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<tr>
<td>Big Spring, TX</td>
<td>$1,111</td>
<td>5.48%</td>
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<tr>
<td>Big Stone Gap, VA</td>
<td>$3,515</td>
<td>17.78%</td>
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<td>Billings, MT</td>
<td>$2,558</td>
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<td>Binghamton, NY</td>
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<td>$1,408</td>
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<td>Bismarck, ND</td>
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<tr>
<td>Blackfoot, ID</td>
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<td>Blacksburg, VA</td>
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<td>Bloomington, IL</td>
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<tr>
<td>Bloomington, IN</td>
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</tr>
<tr>
<td>Bloomsburg-Berwick, PA</td>
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<td>5.70%</td>
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<tr>
<td>Bluefield, WV-VA</td>
<td>$1,853</td>
<td>8.59%</td>
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<tr>
<td>Blytheville, AR</td>
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<tr>
<td>Bogalusa, LA</td>
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<td>Borger, TX</td>
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<tr>
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<td>$2,079</td>
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<td>Bozeman, MT</td>
<td>$2,481</td>
<td>7.88%</td>
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</tr>
<tr>
<td>Location</td>
<td>Population</td>
<td>Market Share</td>
<td>Sales Volume</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>------------</td>
<td>--------------</td>
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</tr>
<tr>
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<td>149</td>
<td>7.52%</td>
<td>456,523</td>
</tr>
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<td>Brainerd, MN</td>
<td>374</td>
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<td>755,337</td>
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<td>364</td>
<td>16.72%</td>
<td>681,753</td>
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<td>Breckenridge, CO</td>
<td>209</td>
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<td>682,450</td>
</tr>
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<td>Bremerton-Silverdale, WA</td>
<td>563</td>
<td>5.03%</td>
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**RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2016-2017**

- 139 -
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<td>Dunn, NC</td>
<td>$957</td>
<td>4.63%</td>
<td>188</td>
<td>$653,027</td>
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<td>Durango, CO</td>
<td>$3,209</td>
<td>10.22%</td>
<td>279</td>
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<td>Durant, OK</td>
<td>$2,120</td>
<td>9.92%</td>
<td>195</td>
<td>$490,995</td>
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<td>Durham-Chapel Hill, NC</td>
<td>$1,682</td>
<td>5.54%</td>
<td>1,191</td>
<td>$768,870</td>
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<td>Dyersburg, TN</td>
<td>$1,732</td>
<td>7.57%</td>
<td>101</td>
<td>$654,564</td>
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<td>Eagle Pass, TX</td>
<td>$1,476</td>
<td>10.47%</td>
<td>142</td>
<td>$593,725</td>
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<td>East Stroudsburg, PA</td>
<td>$1,472</td>
<td>5.76%</td>
<td>400</td>
<td>$608,575</td>
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<td>Easton, MD</td>
<td>$3,768</td>
<td>10.18%</td>
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<td>$1,005,183</td>
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<td>Eau Claire, WI</td>
<td>$1,929</td>
<td>7.61%</td>
<td>490</td>
<td>$653,808</td>
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<td>Edwards, CO</td>
<td>$3,644</td>
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<td>Effingham, IL</td>
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<td>El Campo, TX</td>
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<td>137</td>
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<td>El Centro, CA</td>
<td>$1,313</td>
<td>8.26%</td>
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<td>$457,073</td>
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<td>El Paso, TX</td>
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<td>1,546</td>
<td>$841,124</td>
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<td>Elizabeth City, NC</td>
<td>$1,589</td>
<td>6.51%</td>
<td>134</td>
<td>$754,858</td>
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<tr>
<td>Elizabethtown-Fort Knox, KY</td>
<td>$1,594</td>
<td>6.67%</td>
<td>302</td>
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<td>Elk City, OK</td>
<td>$1,959</td>
<td>6.88%</td>
<td>97</td>
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<td>Elkhart-Goshen, IN</td>
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<td>402</td>
<td>$780,896</td>
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<td>Elkins, WV</td>
<td>$2,475</td>
<td>11.70%</td>
<td>158</td>
<td>$460,867</td>
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<td>Elko, NV</td>
<td>$1,962</td>
<td>6.35%</td>
<td>109</td>
<td>$1,023,404</td>
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<td>Ellensburg, WA</td>
<td>$2,241</td>
<td>9.65%</td>
<td>142</td>
<td>$671,542</td>
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<td>Elmira, NY</td>
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<td>10.65%</td>
<td>212</td>
<td>$1,135,764</td>
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<td>Emporia, KS</td>
<td>$1,975</td>
<td>9.48%</td>
<td>121</td>
<td>$545,355</td>
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<td>Enid, OK</td>
<td>$1,705</td>
<td>6.61%</td>
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<td>Enterprise, AL</td>
<td>$1,860</td>
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<td>$596,774</td>
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<td>Erie, PA</td>
<td>$1,609</td>
<td>6.52%</td>
<td>537</td>
<td>$838,024</td>
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<td>Escanaba, MI</td>
<td>$1,787</td>
<td>8.06%</td>
<td>115</td>
<td>$572,904</td>
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<td>Espanola, NM</td>
<td>$1,989</td>
<td>9.34%</td>
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<td>$591,604</td>
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<td>Eugene, OR</td>
<td>$1,687</td>
<td>7.10%</td>
<td>935</td>
<td>$647,786</td>
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<td>Eureka-Arcata-Fortuna, CA</td>
<td>$1,733</td>
<td>7.08%</td>
<td>366</td>
<td>$639,077</td>
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<td>Evanston, WY</td>
<td>$1,997</td>
<td>7.46%</td>
<td>75</td>
<td>$561,747</td>
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<td>Evansville, IN-KY</td>
<td>$2,011</td>
<td>7.77%</td>
<td>741</td>
<td>$856,431</td>
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<td>Fairbanks, AK</td>
<td>$2,169</td>
<td>6.82%</td>
<td>268</td>
<td>$815,131</td>
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<td>Fairfield, IA</td>
<td>$1,373</td>
<td>5.15%</td>
<td>62</td>
<td>$372,258</td>
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<td>$1,092</td>
<td>4.25%</td>
<td>118</td>
<td>$527,415</td>
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<td>Fallon, NV</td>
<td>$2,181</td>
<td>8.21%</td>
<td>58</td>
<td>$924,190</td>
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<td>Fargo, ND-MN</td>
<td>$1,760</td>
<td>5.53%</td>
<td>485</td>
<td>$843,004</td>
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<td>Faribault-Northfield, MN</td>
<td>$1,099</td>
<td>4.12%</td>
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<td>$734,959</td>
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<td>Farmington, MO</td>
<td>$1,899</td>
<td>10.85%</td>
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<td>Farmington, NM</td>
<td>$1,418</td>
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<td>Fayetteville, AR-MO</td>
<td>$1,481</td>
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<td>1,187</td>
<td>$630,534</td>
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<td>Fayetteville, NC</td>
<td>$1,666</td>
<td>7.31%</td>
<td>781</td>
<td>$829,496</td>
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<td>Fergus Falls, MN</td>
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<td>8.63%</td>
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<tr>
<td>City</td>
<td>Revenue</td>
<td>Growth Rate</td>
<td>Sales</td>
<td>Total Revenue</td>
<td></td>
</tr>
<tr>
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<td>----------</td>
<td>-------------</td>
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<tr>
<td>Fernley, NV</td>
<td>$1,536</td>
<td>7.35%</td>
<td>91</td>
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<td>Findlay, OH</td>
<td>$2,039</td>
<td>7.23%</td>
<td>174</td>
<td>$892,184</td>
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<tr>
<td>Fitzgerald, GA</td>
<td>$1,586</td>
<td>9.40%</td>
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<td>$542,784</td>
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<td>Flagstaff, AZ</td>
<td>$2,672</td>
<td>11.94%</td>
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<td>6.48%</td>
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<td>Florence-Muscle Shoals, AL</td>
<td>$1,804</td>
<td>7.45%</td>
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<td>Florence, SC</td>
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<td>7.87%</td>
<td>486</td>
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<td>Fond du Lac, WI</td>
<td>$1,531</td>
<td>5.86%</td>
<td>207</td>
<td>$753,502</td>
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<td>Forest City, NC</td>
<td>$1,074</td>
<td>5.44%</td>
<td>124</td>
<td>$583,790</td>
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<td>Forrest City, AR</td>
<td>$1,946</td>
<td>12.18%</td>
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<td>$503,087</td>
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<td>Fort Collins, CO</td>
<td>$2,125</td>
<td>6.89%</td>
<td>775</td>
<td>$887,760</td>
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<td>Fort Dodge, IA</td>
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<td>11.95%</td>
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<td>Fort Leonard Wood, MO</td>
<td>$2,381</td>
<td>12.74%</td>
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<td>$764,024</td>
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<td>Fort Madison-Keokuk, IA-MO</td>
<td>$1,038</td>
<td>4.49%</td>
<td>125</td>
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<td>Fort Morgan, CO</td>
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<td>Fort Polk South, LA</td>
<td>$1,181</td>
<td>5.07%</td>
<td>84</td>
<td>$731,393</td>
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<td>Fort Smith, AR-OK</td>
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<td>663</td>
<td>$583,047</td>
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<tr>
<td>Fort Wayne, IN</td>
<td>$1,801</td>
<td>7.09%</td>
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<td>Frankfort, IN</td>
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<td>Frankfort, KY</td>
<td>$1,502</td>
<td>5.94%</td>
<td>143</td>
<td>$754,594</td>
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<td>Fredericksburg, TX</td>
<td>$2,754</td>
<td>8.79%</td>
<td>130</td>
<td>$549,869</td>
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<tr>
<td>Freeport, IL</td>
<td>$2,094</td>
<td>8.41%</td>
<td>126</td>
<td>$769,706</td>
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<tr>
<td>Fremont, NE</td>
<td>$1,757</td>
<td>6.94%</td>
<td>116</td>
<td>$550,034</td>
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<tr>
<td>Fremont, OH</td>
<td>$1,582</td>
<td>6.89%</td>
<td>120</td>
<td>$786,550</td>
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<td>Fresno, CA</td>
<td>$1,657</td>
<td>8.86%</td>
<td>1,950</td>
<td>$825,120</td>
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<td>Gadsden, AL</td>
<td>$1,496</td>
<td>7.55%</td>
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<td>Gaffney, SC</td>
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<td>8.30%</td>
<td>105</td>
<td>$793,752</td>
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<td>Gainesville, TX</td>
<td>$2,233</td>
<td>8.80%</td>
<td>113</td>
<td>$771,407</td>
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<td>Gainesville, FL</td>
<td>$2,375</td>
<td>9.22%</td>
<td>662</td>
<td>$976,757</td>
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<tr>
<td>Gainesville, GA</td>
<td>$1,707</td>
<td>7.86%</td>
<td>472</td>
<td>$692,657</td>
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<td>$1,800</td>
<td>8.10%</td>
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<td>$913,676</td>
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<td>Gallup, NM</td>
<td>$1,546</td>
<td>11.14%</td>
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<td>$809,418</td>
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<td>Garden City, KS</td>
<td>$2,968</td>
<td>12.68%</td>
<td>227</td>
<td>$535,987</td>
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<tr>
<td>Gardnerville Ranchos, NV</td>
<td>$3,643</td>
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<td>Georgetown, SC</td>
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<td>8.98%</td>
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<td>Gettysburg, PA</td>
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<td>$633,328</td>
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<td>Gillette, WY</td>
<td>$2,020</td>
<td>6.23%</td>
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<td>$934,396</td>
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<tr>
<td>Glasgow, KY</td>
<td>$1,573</td>
<td>7.70%</td>
<td>147</td>
<td>$571,422</td>
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<tr>
<td>Glens Falls, NY</td>
<td>$2,592</td>
<td>9.03%</td>
<td>440</td>
<td>$753,870</td>
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<td>Glenwood Springs, CO</td>
<td>$3,715</td>
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<td>$707,030</td>
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<td>Gloversville, NY</td>
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<td>Goldsboro, NC</td>
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<tr>
<td>Grand Forks, ND-MN</td>
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<td>381</td>
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<td>7.44%</td>
<td>244</td>
<td>$643,184</td>
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<tr>
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<td>Median WAGE</td>
<td>Median WAGE %</td>
<td>Median Tips</td>
<td>Median WAGE + TIPS</td>
<td></td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-------------</td>
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<tr>
<td>Grand Junction, CO</td>
<td>$2,153</td>
<td>8.74%</td>
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<td>$920,842</td>
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<td>Grand Rapids-Wyoming, MI</td>
<td>$1,454</td>
<td>5.77%</td>
<td>1,918</td>
<td>$782,009</td>
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<td>Grants, NM</td>
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<td>6.43%</td>
<td>49</td>
<td>$595,653</td>
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<td>Grants Pass, OR</td>
<td>$1,444</td>
<td>7.04%</td>
<td>194</td>
<td>$621,851</td>
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<td>Great Bend, KS</td>
<td>$1,714</td>
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<td>$447,229</td>
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<td>Great Falls, MT</td>
<td>$2,095</td>
<td>8.34%</td>
<td>272</td>
<td>$639,206</td>
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<td>Greeley, CO</td>
<td>$1,225</td>
<td>4.62%</td>
<td>465</td>
<td>$730,751</td>
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<tr>
<td>Green Bay, WI</td>
<td>$1,402</td>
<td>4.99%</td>
<td>670</td>
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<tr>
<td>Greeneville, TN</td>
<td>$1,178</td>
<td>6.04%</td>
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<td>$665,783</td>
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<tr>
<td>Greenfield Town, MA</td>
<td>$1,385</td>
<td>4.52%</td>
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<td>$642,248</td>
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<td>$1,653</td>
<td>7.10%</td>
<td>1,563</td>
<td>$791,987</td>
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<tr>
<td>Greensburg, IN</td>
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<td>13.22%</td>
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<tr>
<td>Greenville, MS</td>
<td>$1,901</td>
<td>10.90%</td>
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<td>$701,233</td>
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</tr>
<tr>
<td>Greenville, NC</td>
<td>$1,896</td>
<td>8.46%</td>
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<td>$863,951</td>
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<tr>
<td>Greenville, OH</td>
<td>$1,321</td>
<td>5.79%</td>
<td>117</td>
<td>$588,829</td>
<td></td>
</tr>
<tr>
<td>Greenville-Anderson, SC</td>
<td>$1,712</td>
<td>7.15%</td>
<td>1,992</td>
<td>$742,355</td>
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<tr>
<td>Greenwood, MS</td>
<td>$2,542</td>
<td>16.91%</td>
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<tr>
<td>Greenwood, SC</td>
<td>$1,422</td>
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<td>$682,416</td>
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<tr>
<td>Grenada, MS</td>
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<td>14.20%</td>
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<td>$846,882</td>
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</tr>
<tr>
<td>Gulfport-Biloxi-Pascagoula, MS</td>
<td>$1,913</td>
<td>8.61%</td>
<td>803</td>
<td>$923,549</td>
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<tr>
<td>Guymon, OK</td>
<td>$2,415</td>
<td>11.02%</td>
<td>128</td>
<td>$429,758</td>
<td></td>
</tr>
<tr>
<td>Hagerstown, MD-WV</td>
<td>$1,552</td>
<td>5.86%</td>
<td>497</td>
<td>$815,702</td>
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<tr>
<td>Hailey, ID</td>
<td>$2,226</td>
<td>7.73%</td>
<td>127</td>
<td>$488,228</td>
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<tr>
<td>Hammond, LA</td>
<td>$1,793</td>
<td>8.93%</td>
<td>254</td>
<td>$900,783</td>
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<tr>
<td>Hanford-Corcoran, CA</td>
<td>$1,101</td>
<td>6.11%</td>
<td>219</td>
<td>$755,457</td>
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<tr>
<td>Hannibal, MO</td>
<td>$1,527</td>
<td>6.65%</td>
<td>104</td>
<td>$574,452</td>
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<tr>
<td>Harrisburg-Carlisle, PA</td>
<td>$1,703</td>
<td>5.64%</td>
<td>1,335</td>
<td>$716,658</td>
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<td>Harrison, AR</td>
<td>$1,180</td>
<td>5.34%</td>
<td>107</td>
<td>$502,271</td>
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<td>Harrisonburg, VA</td>
<td>$2,032</td>
<td>9.18%</td>
<td>319</td>
<td>$837,498</td>
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<tr>
<td>Hartford-West Hartford, CT</td>
<td>$2,204</td>
<td>6.27%</td>
<td>2,915</td>
<td>$919,167</td>
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<td>Hastings, NE</td>
<td>$1,502</td>
<td>5.44%</td>
<td>89</td>
<td>$537,427</td>
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<tr>
<td>Hattiesburg, MS</td>
<td>$2,754</td>
<td>13.09%</td>
<td>427</td>
<td>$967,656</td>
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<td>Hays, KS</td>
<td>$2,899</td>
<td>11.28%</td>
<td>143</td>
<td>$592,007</td>
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<td>Heber, UT</td>
<td>$1,175</td>
<td>4.49%</td>
<td>49</td>
<td>$656,265</td>
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<tr>
<td>Helena, MT</td>
<td>$1,612</td>
<td>5.25%</td>
<td>199</td>
<td>$629,482</td>
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<tr>
<td>Helena-West Helena, AR</td>
<td>$925</td>
<td>5.01%</td>
<td>44</td>
<td>$414,886</td>
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<td>Henderson, NC</td>
<td>$2,383</td>
<td>12.52%</td>
<td>126</td>
<td>$852,286</td>
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<td>Hereford, TX</td>
<td>$1,447</td>
<td>7.34%</td>
<td>71</td>
<td>$396,915</td>
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<tr>
<td>Hermiston-Pendleton, OR</td>
<td>$1,174</td>
<td>5.50%</td>
<td>173</td>
<td>$606,746</td>
<td></td>
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<tr>
<td>Hickory-Lenoir-Morganton, NC</td>
<td>$1,432</td>
<td>6.82%</td>
<td>668</td>
<td>$780,533</td>
<td></td>
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<tr>
<td>Hillsdale, MI</td>
<td>$864</td>
<td>4.09%</td>
<td>84</td>
<td>$470,714</td>
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<td>Hilo, HI</td>
<td>$2,697</td>
<td>11.50%</td>
<td>487</td>
<td>$1,073,172</td>
<td></td>
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<tr>
<td>Hilton Head Island, SC</td>
<td>$2,489</td>
<td>8.25%</td>
<td>657</td>
<td>$775,572</td>
<td></td>
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<tr>
<td>Hinesville, GA</td>
<td>$1,291</td>
<td>6.29%</td>
<td>149</td>
<td>$700,329</td>
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</tr>
<tr>
<td>Location</td>
<td>Sales (in $)</td>
<td>Growth Rate (%)</td>
<td>Sales Growth</td>
<td>Population (in $)</td>
<td></td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>--------------</td>
<td>-----------------</td>
<td>-------------</td>
<td>------------------</td>
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</tr>
<tr>
<td>Hobbs, NM</td>
<td>$1,429</td>
<td>5.58%</td>
<td></td>
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</tr>
<tr>
<td>Holland, MI</td>
<td>$1,160</td>
<td>4.81%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Homosassa Springs, FL</td>
<td>$1,325</td>
<td>5.57%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Honolulu (Urban), HI</td>
<td>$3,265</td>
<td>10.84%</td>
<td>2,408</td>
<td>$1,351,022</td>
<td></td>
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<tr>
<td>Hood River, OR</td>
<td>$2,581</td>
<td>8.99%</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Hot Springs, AR</td>
<td>$1,619</td>
<td>6.26%</td>
<td></td>
<td></td>
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<tr>
<td>Houghton, MI</td>
<td>$2,732</td>
<td>13.30%</td>
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<tr>
<td>Houma-Thibodaux, LA</td>
<td>$1,716</td>
<td>7.06%</td>
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</tr>
<tr>
<td>Houston-The Woodlands, TX</td>
<td>$1,557</td>
<td>5.37%</td>
<td>13,191</td>
<td>$763,333</td>
<td></td>
</tr>
<tr>
<td>Hood River, OR</td>
<td>$2,581</td>
<td>8.99%</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Honolulu-Carmel, IN</td>
<td>$1,784</td>
<td>6.45%</td>
<td>3,955</td>
<td>$896,547</td>
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</tr>
<tr>
<td>Indiana, PA</td>
<td>$2,234</td>
<td>7.34%</td>
<td></td>
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</tr>
<tr>
<td>Indianapolis-Carmel, IN</td>
<td>$1,838</td>
<td>7.24%</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Indiana, PA</td>
<td>$2,234</td>
<td>7.34%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ithaca, NY</td>
<td>$2,133</td>
<td>8.68%</td>
<td>1,360</td>
<td>$906,819</td>
<td></td>
</tr>
<tr>
<td>Iron Mountain, MI-WI</td>
<td>$1,917</td>
<td>7.36%</td>
<td></td>
<td></td>
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<tr>
<td>Jackson, MS</td>
<td>$1,896</td>
<td>7.03%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jackson, MI</td>
<td>$2,133</td>
<td>8.68%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jackson, OH</td>
<td>$2,124</td>
<td>8.50%</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Jackson, TN</td>
<td>$3,048</td>
<td>12.90%</td>
<td></td>
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</tr>
<tr>
<td>Jackson, WY-ID</td>
<td>$3,709</td>
<td>10.67%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Janesville, FL</td>
<td>$2,079</td>
<td>7.89%</td>
<td>3,317</td>
<td>$888,233</td>
<td></td>
</tr>
<tr>
<td>Janesville, IL</td>
<td>$2,541</td>
<td>9.75%</td>
<td></td>
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<tr>
<td>Janesville, NC</td>
<td>$1,480</td>
<td>7.69%</td>
<td>343</td>
<td>$844,583</td>
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</tr>
<tr>
<td>Janesville, TX</td>
<td>$1,311</td>
<td>7.04%</td>
<td></td>
<td></td>
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<tr>
<td>Jamestown, ND</td>
<td>$1,896</td>
<td>6.14%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jamestown-Fredonia, NY</td>
<td>$2,312</td>
<td>10.06%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Janesville-Beloit, WI</td>
<td>$1,387</td>
<td>5.91%</td>
<td>323</td>
<td>$692,074</td>
<td></td>
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<tr>
<td>Jasper, IN</td>
<td>$1,838</td>
<td>7.24%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jefferson, GA</td>
<td>$1,979</td>
<td>9.06%</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Jefferson City, MO</td>
<td>$1,935</td>
<td>8.08%</td>
<td>407</td>
<td>$716,224</td>
<td></td>
</tr>
<tr>
<td>Jesup, GA</td>
<td>$1,171</td>
<td>6.40%</td>
<td></td>
<td></td>
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<tr>
<td>Johnson City, TN</td>
<td>$1,818</td>
<td>7.68%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Johnstown, PA</td>
<td>$1,369</td>
<td>5.84%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>Average Sales</td>
<td>Year-over-Year Change</td>
<td>Sales Growth</td>
<td>Average Ticket Price</td>
<td>Total Sales</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>---------------</td>
<td>-----------------------</td>
<td>--------------</td>
<td>----------------------</td>
<td>--------------------</td>
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<tr>
<td>Jonesboro, AR:</td>
<td>$1,520</td>
<td>6.46%</td>
<td>279</td>
<td>$289</td>
<td>$695,781</td>
</tr>
<tr>
<td>Joplin, MO:</td>
<td>$2,111</td>
<td>9.90%</td>
<td>486</td>
<td>$431</td>
<td>$760,681</td>
</tr>
<tr>
<td>Junction City, KS:</td>
<td>$1,261</td>
<td>5.89%</td>
<td>84</td>
<td>$152</td>
<td>$568,702</td>
</tr>
<tr>
<td>Juneau, AK:</td>
<td>$2,813</td>
<td>7.02%</td>
<td>140</td>
<td>$201</td>
<td>$670,571</td>
</tr>
<tr>
<td>Kahului-Wailuku-Lahaina, HI:</td>
<td>$4,721</td>
<td>17.05%</td>
<td>506</td>
<td>$930</td>
<td>$1,521,451</td>
</tr>
<tr>
<td>Kalamazoo-Portage, MI:</td>
<td>$1,655</td>
<td>6.85%</td>
<td>687</td>
<td>$243</td>
<td>$806,891</td>
</tr>
<tr>
<td>Kalispell, MT:</td>
<td>$2,027</td>
<td>7.64%</td>
<td>340</td>
<td>$600</td>
<td>$563,679</td>
</tr>
<tr>
<td>Kankakee, IL:</td>
<td>$2,093</td>
<td>8.80%</td>
<td>262</td>
<td>$789</td>
<td>$888,477</td>
</tr>
<tr>
<td>Kansas City, MO-KS:</td>
<td>$1,644</td>
<td>5.66%</td>
<td>4,228</td>
<td>$393</td>
<td>$807,379</td>
</tr>
<tr>
<td>Kapaa, HI:</td>
<td>$4,499</td>
<td>17.35%</td>
<td>241</td>
<td>$186</td>
<td>$1,322,992</td>
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<tr>
<td>Kearney, NE:</td>
<td>$1,864</td>
<td>6.61%</td>
<td>175</td>
<td>$108</td>
<td>$587,594</td>
</tr>
<tr>
<td>Keene, NH:</td>
<td>$1,992</td>
<td>6.91%</td>
<td>250</td>
<td>$792</td>
<td>$613,428</td>
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<tr>
<td>Kendallville, IN:</td>
<td>$1,280</td>
<td>5.79%</td>
<td>91</td>
<td>$136</td>
<td>$670,242</td>
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<tr>
<td>Kennett, MO:</td>
<td>$1,383</td>
<td>7.39%</td>
<td>92</td>
<td>$125</td>
<td>$473,272</td>
</tr>
<tr>
<td>Kennewick-Richland, WA:</td>
<td>$1,441</td>
<td>5.35%</td>
<td>478</td>
<td>$302</td>
<td>$840,663</td>
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<tr>
<td>Kerrville, TX:</td>
<td>$1,737</td>
<td>6.46%</td>
<td>142</td>
<td>$126</td>
<td>$619,415</td>
</tr>
<tr>
<td>Ketchikan, AK:</td>
<td>$2,477</td>
<td>7.75%</td>
<td>53</td>
<td>$476</td>
<td>$648,057</td>
</tr>
<tr>
<td>Key West, FL:</td>
<td>$4,429</td>
<td>12.14%</td>
<td>429</td>
<td>$105</td>
<td>$797,522</td>
</tr>
<tr>
<td>Kill Devil Hills, NC:</td>
<td>$5,191</td>
<td>17.11%</td>
<td>291</td>
<td>$174</td>
<td>$707,230</td>
</tr>
<tr>
<td>Killeen-Temple, TX:</td>
<td>$1,412</td>
<td>6.13%</td>
<td>786</td>
<td>$576</td>
<td>$778,528</td>
</tr>
<tr>
<td>Kingsport-Bristol-Bristol, TN-VA:</td>
<td>$1,856</td>
<td>7.76%</td>
<td>707</td>
<td>$260</td>
<td>$810,576</td>
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<tr>
<td>Kingston, NY:</td>
<td>$2,476</td>
<td>8.00%</td>
<td>744</td>
<td>$332</td>
<td>$598,828</td>
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<tr>
<td>Kingsville, TX:</td>
<td>$1,739</td>
<td>8.52%</td>
<td>85</td>
<td>$150</td>
<td>$672,918</td>
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<td>Kinston, NC:</td>
<td>$1,539</td>
<td>7.47%</td>
<td>129</td>
<td>$122</td>
<td>$704,791</td>
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<tr>
<td>Kirksville, MO:</td>
<td>$2,321</td>
<td>11.40%</td>
<td>120</td>
<td>$191</td>
<td>$578,075</td>
</tr>
<tr>
<td>Klamath Falls, OR:</td>
<td>$1,540</td>
<td>7.50%</td>
<td>189</td>
<td>$262</td>
<td>$541,937</td>
</tr>
<tr>
<td>Knoxville, TN:</td>
<td>$1,755</td>
<td>7.05%</td>
<td>1,825</td>
<td>$963</td>
<td>$826,449</td>
</tr>
<tr>
<td>Kokomo, IN:</td>
<td>$2,090</td>
<td>9.53%</td>
<td>187</td>
<td>$108</td>
<td>$923,936</td>
</tr>
<tr>
<td>La Crosse-Onalaska, WI-MN:</td>
<td>$2,235</td>
<td>8.23%</td>
<td>427</td>
<td>$540</td>
<td>$713,532</td>
</tr>
<tr>
<td>La Grande, OR:</td>
<td>$2,775</td>
<td>12.81%</td>
<td>135</td>
<td>$210</td>
<td>$536,363</td>
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<tr>
<td>Laconia, NH:</td>
<td>$2,665</td>
<td>8.38%</td>
<td>230</td>
<td>$117</td>
<td>$697,904</td>
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<tr>
<td>Lafayette, LA:</td>
<td>$1,865</td>
<td>7.15%</td>
<td>1,023</td>
<td>$1,014</td>
<td>$885,254</td>
</tr>
<tr>
<td>Lafayette-West Lafayette, IN:</td>
<td>$2,029</td>
<td>8.76%</td>
<td>470</td>
<td>$432</td>
<td>$916,987</td>
</tr>
<tr>
<td>LaGrange, GA:</td>
<td>$1,536</td>
<td>7.00%</td>
<td>151</td>
<td>$120</td>
<td>$711,536</td>
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<tr>
<td>Lake Charles, LA:</td>
<td>$1,808</td>
<td>7.48%</td>
<td>376</td>
<td>$479</td>
<td>$977,463</td>
</tr>
<tr>
<td>Lake City, FL:</td>
<td>$2,442</td>
<td>12.99%</td>
<td>173</td>
<td>$1,408</td>
<td>$957,908</td>
</tr>
<tr>
<td>Lake Havasu City-Kingman, AZ:</td>
<td>$1,488</td>
<td>7.61%</td>
<td>408</td>
<td>$363</td>
<td>$742,056</td>
</tr>
<tr>
<td>Lakeland-Winter Haven, FL:</td>
<td>$1,495</td>
<td>7.33%</td>
<td>977</td>
<td>$1,534</td>
<td>$968,038</td>
</tr>
<tr>
<td>Lamesa, TX:</td>
<td>$1,206</td>
<td>6.65%</td>
<td>31</td>
<td>$373</td>
<td>$542,290</td>
</tr>
<tr>
<td>Lancaster, PA:</td>
<td>$1,373</td>
<td>5.25%</td>
<td>977</td>
<td>$1,373</td>
<td>$750,890</td>
</tr>
<tr>
<td>Lansing-East Lansing, MI:</td>
<td>$1,564</td>
<td>6.22%</td>
<td>904</td>
<td>$1,727</td>
<td>$811,038</td>
</tr>
<tr>
<td>Laramie, WY:</td>
<td>$3,203</td>
<td>11.72%</td>
<td>142</td>
<td>$227</td>
<td>$852,789</td>
</tr>
<tr>
<td>Laredo, TX:</td>
<td>$1,505</td>
<td>11.20%</td>
<td>556</td>
<td>$268</td>
<td>$731,266</td>
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<tr>
<td>Las Cruces, NM:</td>
<td>$1,312</td>
<td>6.55%</td>
<td>374</td>
<td>$883</td>
<td>$750,513</td>
</tr>
<tr>
<td>Location</td>
<td>District (If Applicable)</td>
<td>2016 Median Sales</td>
<td>2017 Median Sales</td>
<td>Change (%)</td>
<td></td>
</tr>
<tr>
<td>--------------------------------</td>
<td>--------------------------</td>
<td>-------------------</td>
<td>-------------------</td>
<td>-----------</td>
<td></td>
</tr>
<tr>
<td>Las Vegas, NM</td>
<td></td>
<td>$2,580</td>
<td>$2,580</td>
<td>0.0%</td>
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</tr>
<tr>
<td>Las Vegas-Henderson, NV</td>
<td></td>
<td>$3,598</td>
<td>$3,598</td>
<td>0.0%</td>
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<td>Lebanon, MO</td>
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<td>Lewiston, ID-WA</td>
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<td>Lumberton, NC</td>
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<td>Lynchburg, VA</td>
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<td>Macomb, IL</td>
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<td>Macon, GA</td>
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<td>City</td>
<td>Population</td>
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<td>Change</td>
<td>Income</td>
<td></td>
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<tr>
<td>Malone, NY</td>
<td>$2,697</td>
<td>11.66%</td>
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<td>Malvern, AR</td>
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<td>7.70%</td>
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<td>Manistowoc, WI</td>
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<td>4.31%</td>
<td>152</td>
<td>$586,566</td>
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<td>Mankato-North Mankato, MN</td>
<td>$2,219</td>
<td>8.24%</td>
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<td>Mansfield, OH</td>
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<td>8.18%</td>
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<td>Marietta, OH</td>
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<td>5.69%</td>
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<td>Marinette, WI-MI</td>
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<td>8.94%</td>
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<td>8.16%</td>
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<td>$868,772</td>
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<td>$1,695</td>
<td>8.91%</td>
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<td>$3,077</td>
<td>11.33%</td>
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<td>Marshall, MO</td>
<td>$1,859</td>
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<td>Marshalltown, IA</td>
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<td>7.74%</td>
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<td>Martinsville, VA</td>
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<td>Maryville, MO</td>
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<td>Mayfield, KY</td>
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<td>Maysville, KY</td>
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<td>12.31%</td>
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<td>McAlester, OK</td>
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<td>7.39%</td>
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<td>McAllen-Edinburg-Mission, TX</td>
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<td>8.22%</td>
<td>1,393</td>
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<td>McComb, MS</td>
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<td>McMinnville, TN</td>
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<td>6.89%</td>
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<td>McPherson, KS</td>
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<td>Medford, OR</td>
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<td>7.56%</td>
<td>635</td>
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<td>4.54%</td>
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<td>Miami, OK</td>
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<td>12.28%</td>
<td>159</td>
<td>$474,830</td>
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<td>Miami-Fort Lauderdale, FL</td>
<td>$1,815</td>
<td>6.97%</td>
<td>13,590</td>
<td>$791,357</td>
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<td>$1,802</td>
<td>7.92%</td>
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<td>Middleborough, KY</td>
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<td>Midland, TX</td>
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<td>$1,852</td>
<td>11.60%</td>
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<td>$740,474</td>
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<tr>
<td>Milwaukee-Waukesha, WI</td>
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<td>4.82%</td>
<td>2,878</td>
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<td>Salary</td>
<td>Deviation</td>
<td>Population</td>
<td>Market Size</td>
<td></td>
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<tr>
<td>Mineral Wells, TX</td>
<td>$2,844</td>
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<td>$919,516</td>
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<tr>
<td>Minot, ND</td>
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<td>5.92%</td>
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<td>Missoula, MT</td>
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<td>10.04%</td>
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<td>Mobile, AL</td>
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<td>6.93%</td>
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<td>Monroe, LA</td>
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<tr>
<td>Monroe, MI</td>
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<td>4.72%</td>
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<td>Montrose, CO</td>
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<td>13.77%</td>
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<td>$571,519</td>
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<tr>
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<td>10.58%</td>
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<td>14.53%</td>
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<td>$642,875</td>
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RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2016-2017 • 149 •
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<th>Average Weekly Sales</th>
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<td>5,902</td>
<td>$681,661</td>
</tr>
<tr>
<td>Portsmouth, OH</td>
<td>$1,292</td>
<td>6.50%</td>
<td>167</td>
<td>$599,102</td>
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<tr>
<td>Pottsville, PA</td>
<td>$928</td>
<td>3.87%</td>
<td>291</td>
<td>$466,357</td>
</tr>
<tr>
<td>Prescott, AZ</td>
<td>$1,663</td>
<td>6.71%</td>
<td>481</td>
<td>$753,857</td>
</tr>
<tr>
<td>Price, UT</td>
<td>$2,054</td>
<td>9.19%</td>
<td>69</td>
<td>$638,870</td>
</tr>
<tr>
<td>Prineville, OR</td>
<td>$2,619</td>
<td>13.74%</td>
<td>98</td>
<td>$555,592</td>
</tr>
<tr>
<td>Providence-Warwick, RI-MA</td>
<td>$1,888</td>
<td>6.34%</td>
<td>4,250</td>
<td>$713,938</td>
</tr>
<tr>
<td>Provo-Orem, UT</td>
<td>$1,113</td>
<td>5.49%</td>
<td>863</td>
<td>$749,621</td>
</tr>
<tr>
<td>Pueblo, CO</td>
<td>$1,802</td>
<td>8.05%</td>
<td>410</td>
<td>$716,790</td>
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<td>Pullman, WA</td>
<td>$1,432</td>
<td>6.30%</td>
<td>96</td>
<td>$706,406</td>
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<td>Punta Gorda, FL</td>
<td>$1,831</td>
<td>7.03%</td>
<td>351</td>
<td>$877,476</td>
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<td>Quincy, IL-MO</td>
<td>$2,029</td>
<td>8.12%</td>
<td>166</td>
<td>$942,988</td>
</tr>
<tr>
<td>Raleigh, NC</td>
<td>$1,686</td>
<td>5.39%</td>
<td>2,522</td>
<td>$830,843</td>
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<td>Rapid City, SD</td>
<td>$2,009</td>
<td>6.98%</td>
<td>370</td>
<td>$787,605</td>
</tr>
<tr>
<td>Raymondville, TX</td>
<td>$673</td>
<td>5.98%</td>
<td>27</td>
<td>$549,185</td>
</tr>
<tr>
<td>Reading, PA</td>
<td>$1,302</td>
<td>4.96%</td>
<td>898</td>
<td>$600,842</td>
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<tr>
<td>Red Bluff, CA</td>
<td>$1,555</td>
<td>7.62%</td>
<td>146</td>
<td>$674,349</td>
</tr>
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<td>Red Wing, MN</td>
<td>$1,571</td>
<td>5.24%</td>
<td>89</td>
<td>$823,955</td>
</tr>
<tr>
<td>Redding, CA</td>
<td>$1,978</td>
<td>7.88%</td>
<td>505</td>
<td>$704,632</td>
</tr>
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<td>Reno, NV</td>
<td>$2,858</td>
<td>11.16%</td>
<td>990</td>
<td>$1,276,834</td>
</tr>
<tr>
<td>Rexburg, ID</td>
<td>$992</td>
<td>5.98%</td>
<td>81</td>
<td>$612,296</td>
</tr>
<tr>
<td>Richmond, IN</td>
<td>$2,287</td>
<td>11.94%</td>
<td>166</td>
<td>$927,265</td>
</tr>
<tr>
<td>Richmond, VA</td>
<td>$1,920</td>
<td>6.35%</td>
<td>2,900</td>
<td>$834,618</td>
</tr>
<tr>
<td>Richmond-Berea, KY</td>
<td>$1,660</td>
<td>8.46%</td>
<td>210</td>
<td>$815,352</td>
</tr>
<tr>
<td>Rio Grande City, TX</td>
<td>$802</td>
<td>7.09%</td>
<td>107</td>
<td>$473,897</td>
</tr>
<tr>
<td>Riverside, CA</td>
<td>$1,555</td>
<td>7.54%</td>
<td>7,824</td>
<td>$880,567</td>
</tr>
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<td>Riverton, WY</td>
<td>$2,157</td>
<td>8.42%</td>
<td>146</td>
<td>$608,390</td>
</tr>
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<td>Roanoke Rapids, NC</td>
<td>$1,765</td>
<td>9.36%</td>
<td>200</td>
<td>$652,115</td>
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<td>Roanoke, VA</td>
<td>$2,194</td>
<td>7.93%</td>
<td>808</td>
<td>$852,076</td>
</tr>
<tr>
<td>Rochelle, IL</td>
<td>$1,359</td>
<td>4.74%</td>
<td>113</td>
<td>$622,743</td>
</tr>
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<td>Rochester, MN</td>
<td>$1,767</td>
<td>5.40%</td>
<td>461</td>
<td>$821,425</td>
</tr>
<tr>
<td>Rochester, NY</td>
<td>$2,199</td>
<td>7.90%</td>
<td>2,482</td>
<td>$960,900</td>
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<tr>
<td>Rock Springs, WY</td>
<td>$2,385</td>
<td>7.63%</td>
<td>138</td>
<td>$791,261</td>
</tr>
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<td>Rockford, IL</td>
<td>$1,829</td>
<td>7.16%</td>
<td>657</td>
<td>$953,376</td>
</tr>
<tr>
<td>Rockingham, NC</td>
<td>$1,460</td>
<td>8.03%</td>
<td>94</td>
<td>$717,660</td>
</tr>
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<td>Rocky Mount, NC</td>
<td>$1,341</td>
<td>6.65%</td>
<td>255</td>
<td>$791,137</td>
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<td>Rolla, MO</td>
<td>$2,707</td>
<td>12.61%</td>
<td>173</td>
<td>$696,775</td>
</tr>
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<td>Rome, GA</td>
<td>$1,722</td>
<td>8.74%</td>
<td>206</td>
<td>$798,864</td>
</tr>
<tr>
<td>Roseburg, OR</td>
<td>$1,351</td>
<td>6.35%</td>
<td>269</td>
<td>$543,829</td>
</tr>
<tr>
<td>Roswell, NM</td>
<td>$1,296</td>
<td>5.92%</td>
<td>117</td>
<td>$730,009</td>
</tr>
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<td>Russellville, AR</td>
<td>$1,660</td>
<td>8.09%</td>
<td>245</td>
<td>$571,755</td>
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<td>Ruston, LA</td>
<td>$2,279</td>
<td>10.63%</td>
<td>122</td>
<td>$892,533</td>
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<td>Rutland, VT</td>
<td>$2,021</td>
<td>7.31%</td>
<td>228</td>
<td>$533,031</td>
</tr>
<tr>
<td>City</td>
<td>Revenue</td>
<td>Percent</td>
<td>Units</td>
<td>Annual Sales</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>---------</td>
<td>---------</td>
<td>-------</td>
<td>----------------</td>
</tr>
<tr>
<td>Sacramento--Roseville, CA</td>
<td>$1,780</td>
<td>6.38%</td>
<td>4,646</td>
<td>$859,200</td>
</tr>
<tr>
<td>Safford, AZ</td>
<td>$1,153</td>
<td>6.24%</td>
<td>59</td>
<td>$740,203</td>
</tr>
<tr>
<td>Saginaw, MI</td>
<td>$1,534</td>
<td>7.18%</td>
<td>366</td>
<td>$815,530</td>
</tr>
<tr>
<td>Salem, OH</td>
<td>$952</td>
<td>3.79%</td>
<td>168</td>
<td>$595,042</td>
</tr>
<tr>
<td>Salem, OR</td>
<td>$1,186</td>
<td>5.67%</td>
<td>789</td>
<td>$609,380</td>
</tr>
<tr>
<td>Salina, KS</td>
<td>$2,287</td>
<td>9.13%</td>
<td>219</td>
<td>$644,808</td>
</tr>
<tr>
<td>Salinas, CA</td>
<td>$1,874</td>
<td>7.87%</td>
<td>978</td>
<td>$829,101</td>
</tr>
<tr>
<td>Salisbury, MD-DE</td>
<td>$3,570</td>
<td>13.00%</td>
<td>1,365</td>
<td>$1,022,064</td>
</tr>
<tr>
<td>Salt Lake City, UT</td>
<td>$1,410</td>
<td>5.50%</td>
<td>2,200</td>
<td>$743,485</td>
</tr>
<tr>
<td>San Angelo, TX</td>
<td>$1,956</td>
<td>8.11%</td>
<td>314</td>
<td>$731,398</td>
</tr>
<tr>
<td>San Antonio-New Braunfels, TX</td>
<td>$1,798</td>
<td>6.94%</td>
<td>4,882</td>
<td>$860,469</td>
</tr>
<tr>
<td>San Diego-Carlsbad, CA</td>
<td>$1,936</td>
<td>6.64%</td>
<td>7,349</td>
<td>$856,156</td>
</tr>
<tr>
<td>San Francisco-Oakland, CA</td>
<td>$1,873</td>
<td>4.46%</td>
<td>12,407</td>
<td>$691,829</td>
</tr>
<tr>
<td>San Jose-Sunnyvale, CA</td>
<td>$1,744</td>
<td>4.05%</td>
<td>4,321</td>
<td>$789,052</td>
</tr>
<tr>
<td>San Luis Obispo, CA</td>
<td>$2,472</td>
<td>7.86%</td>
<td>872</td>
<td>$785,181</td>
</tr>
<tr>
<td>Sandpoint, ID</td>
<td>$1,740</td>
<td>7.25%</td>
<td>158</td>
<td>$448,797</td>
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<td>Sandusky, OH</td>
<td>$2,253</td>
<td>8.67%</td>
<td>224</td>
<td>$759,830</td>
</tr>
<tr>
<td>Sanford, NC</td>
<td>$1,269</td>
<td>6.13%</td>
<td>104</td>
<td>$742,231</td>
</tr>
<tr>
<td>Santa Cruz-Watsonville, CA</td>
<td>$1,822</td>
<td>5.13%</td>
<td>628</td>
<td>$797,538</td>
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<td>Santa Fe, NM</td>
<td>$1,989</td>
<td>6.19%</td>
<td>365</td>
<td>$811,263</td>
</tr>
<tr>
<td>Santa Maria-Santa Barbara, CA</td>
<td>$1,872</td>
<td>6.45%</td>
<td>1,020</td>
<td>$808,255</td>
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<tr>
<td>Santa Rosa, CA</td>
<td>$1,879</td>
<td>5.71%</td>
<td>1,265</td>
<td>$742,348</td>
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<td>Sault Ste. Marie, MI</td>
<td>$3,746</td>
<td>18.15%</td>
<td>242</td>
<td>$598,669</td>
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<td>Savannah, GA</td>
<td>$2,143</td>
<td>8.61%</td>
<td>982</td>
<td>$814,363</td>
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<td>Sayre, PA</td>
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<td>4.96%</td>
<td>149</td>
<td>$556,215</td>
</tr>
<tr>
<td>Scottsbluff, NE</td>
<td>$2,532</td>
<td>10.28%</td>
<td>207</td>
<td>$475,314</td>
</tr>
<tr>
<td>Scottsboro, AL</td>
<td>$1,800</td>
<td>8.00%</td>
<td>147</td>
<td>$646,327</td>
</tr>
<tr>
<td>Scranton--Wilkes-Barre, PA</td>
<td>$1,931</td>
<td>7.63%</td>
<td>1,806</td>
<td>$598,936</td>
</tr>
<tr>
<td>Searcy, AR</td>
<td>$1,535</td>
<td>6.90%</td>
<td>206</td>
<td>$586,583</td>
</tr>
<tr>
<td>Seattle-Tacoma-Bellevue, WA</td>
<td>$1,773</td>
<td>4.98%</td>
<td>9,730</td>
<td>$667,321</td>
</tr>
<tr>
<td>Sebastian-Vero Beach, FL</td>
<td>$1,951</td>
<td>7.03%</td>
<td>339</td>
<td>$827,566</td>
</tr>
<tr>
<td>Sebring, FL</td>
<td>$1,528</td>
<td>7.43%</td>
<td>181</td>
<td>$831,674</td>
</tr>
<tr>
<td>Sedalia, MO</td>
<td>$2,458</td>
<td>12.03%</td>
<td>158</td>
<td>$656,241</td>
</tr>
<tr>
<td>Selinsgrove, PA</td>
<td>$2,332</td>
<td>9.94%</td>
<td>95</td>
<td>$981,579</td>
</tr>
<tr>
<td>Selma, AL</td>
<td>$1,388</td>
<td>8.56%</td>
<td>110</td>
<td>$518,091</td>
</tr>
<tr>
<td>Seneca Falls, NY</td>
<td>$2,022</td>
<td>8.38%</td>
<td>73</td>
<td>$980,740</td>
</tr>
<tr>
<td>Seneca, SC</td>
<td>$1,192</td>
<td>5.07%</td>
<td>168</td>
<td>$535,923</td>
</tr>
<tr>
<td>Sevierville, TN</td>
<td>$4,215</td>
<td>19.92%</td>
<td>417</td>
<td>$962,911</td>
</tr>
<tr>
<td>Seymour, IN</td>
<td>$1,499</td>
<td>6.57%</td>
<td>84</td>
<td>$784,631</td>
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<td>Shawano, WI</td>
<td>$1,012</td>
<td>4.43%</td>
<td>91</td>
<td>$510,110</td>
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<tr>
<td>Shawnee, OK</td>
<td>$1,570</td>
<td>7.04%</td>
<td>169</td>
<td>$667,580</td>
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<td>Sheboygan, WI</td>
<td>$1,450</td>
<td>5.40%</td>
<td>250</td>
<td>$665,140</td>
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<tr>
<td>Shelby, NC</td>
<td>$1,166</td>
<td>5.94%</td>
<td>162</td>
<td>$698,117</td>
</tr>
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<td>Shelbyville, TN</td>
<td>$1,126</td>
<td>5.44%</td>
<td>65</td>
<td>$803,292</td>
</tr>
<tr>
<td>City</td>
<td>Revenue</td>
<td>Growth</td>
<td>Pop Hab</td>
<td>Revenue</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------</td>
<td>--------</td>
<td>---------</td>
<td>---------</td>
</tr>
<tr>
<td>Shelton, WA</td>
<td>$857</td>
<td>3.70%</td>
<td>114</td>
<td>$464,579</td>
</tr>
<tr>
<td>Sheridan, WY</td>
<td>$3,228</td>
<td>10.41%</td>
<td>124</td>
<td>$785,524</td>
</tr>
<tr>
<td>Sherman-Denison, TX</td>
<td>$1,670</td>
<td>6.70%</td>
<td>265</td>
<td>$778,962</td>
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<tr>
<td>Show Low, AZ</td>
<td>$1,326</td>
<td>8.41%</td>
<td>221</td>
<td>$645,371</td>
</tr>
<tr>
<td>Shreveport-Bossier City, LA</td>
<td>$1,917</td>
<td>7.21%</td>
<td>958</td>
<td>$894,179</td>
</tr>
<tr>
<td>Sidney, OH</td>
<td>$1,139</td>
<td>4.53%</td>
<td>75</td>
<td>$745,907</td>
</tr>
<tr>
<td>Sierra Vista-Douglas, AZ</td>
<td>$1,649</td>
<td>7.24%</td>
<td>266</td>
<td>$789,011</td>
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<tr>
<td>Sikeston, MO</td>
<td>$1,980</td>
<td>8.89%</td>
<td>116</td>
<td>$672,155</td>
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<tr>
<td>Silver City, NM</td>
<td>$1,771</td>
<td>7.65%</td>
<td>101</td>
<td>$512,951</td>
</tr>
<tr>
<td>Sioux City, IA-NE-SD</td>
<td>$2,093</td>
<td>8.39%</td>
<td>474</td>
<td>$744,627</td>
</tr>
<tr>
<td>Sioux Falls, SD</td>
<td>$1,706</td>
<td>6.17%</td>
<td>511</td>
<td>$839,644</td>
</tr>
<tr>
<td>Snyder, TX</td>
<td>$1,921</td>
<td>7.94%</td>
<td>76</td>
<td>$446,789</td>
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<tr>
<td>Somerset, KY</td>
<td>$1,930</td>
<td>9.03%</td>
<td>178</td>
<td>$697,185</td>
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<tr>
<td>Somerset, PA</td>
<td>$1,736</td>
<td>6.91%</td>
<td>203</td>
<td>$648,478</td>
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<tr>
<td>Sonora, CA</td>
<td>$2,930</td>
<td>11.92%</td>
<td>239</td>
<td>$659,138</td>
</tr>
<tr>
<td>South Bend-Mishawaka, IN-MI</td>
<td>$1,662</td>
<td>7.03%</td>
<td>633</td>
<td>$835,583</td>
</tr>
<tr>
<td>Spartanburg, SC</td>
<td>$1,496</td>
<td>7.22%</td>
<td>635</td>
<td>$758,520</td>
</tr>
<tr>
<td>Spearfish, SD</td>
<td>$2,769</td>
<td>9.37%</td>
<td>89</td>
<td>$792,000</td>
</tr>
<tr>
<td>Spencer, IA</td>
<td>$2,563</td>
<td>8.67%</td>
<td>89</td>
<td>$471,787</td>
</tr>
<tr>
<td>Spirit Lake, IA</td>
<td>$3,966</td>
<td>11.64%</td>
<td>115</td>
<td>$587,113</td>
</tr>
<tr>
<td>Spokane-Spokane Valley, WA</td>
<td>$1,591</td>
<td>6.23%</td>
<td>1,206</td>
<td>$719,513</td>
</tr>
<tr>
<td>Springfield, IL</td>
<td>$2,334</td>
<td>7.57%</td>
<td>522</td>
<td>$947,381</td>
</tr>
<tr>
<td>Springfield, MA</td>
<td>$1,789</td>
<td>6.46%</td>
<td>1,397</td>
<td>$804,734</td>
</tr>
<tr>
<td>Springfield, MO</td>
<td>$1,831</td>
<td>8.09%</td>
<td>1,062</td>
<td>$783,859</td>
</tr>
<tr>
<td>Springfield, OH</td>
<td>$1,328</td>
<td>6.19%</td>
<td>224</td>
<td>$800,594</td>
</tr>
<tr>
<td>St. Cloud, MN</td>
<td>$1,795</td>
<td>6.71%</td>
<td>405</td>
<td>$854,188</td>
</tr>
<tr>
<td>St. George, UT</td>
<td>$1,389</td>
<td>6.97%</td>
<td>276</td>
<td>$760,022</td>
</tr>
<tr>
<td>St. Joseph, MO-KS</td>
<td>$1,927</td>
<td>8.62%</td>
<td>299</td>
<td>$823,358</td>
</tr>
<tr>
<td>St. Louis, MO-IL</td>
<td>$1,890</td>
<td>6.45%</td>
<td>6,062</td>
<td>$874,981</td>
</tr>
<tr>
<td>St. Marys, GA</td>
<td>$1,674</td>
<td>7.13%</td>
<td>126</td>
<td>$689,794</td>
</tr>
<tr>
<td>Starkville, MS</td>
<td>$3,828</td>
<td>18.06%</td>
<td>188</td>
<td>$1,009,176</td>
</tr>
<tr>
<td>State College, PA</td>
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<td>$2,458</td>
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<td>$594,820</td>
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</tbody>
</table>

**RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2016-2017**

- 153 -
<table>
<thead>
<tr>
<th>City</th>
<th>Average Check</th>
<th>Change</th>
<th>Counts</th>
<th>Total Revenue</th>
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<td>Sunbury, PA</td>
<td>$760</td>
<td>3.23%</td>
<td>151</td>
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</tr>
<tr>
<td>Susanville, CA</td>
<td>$1,562</td>
<td>7.19%</td>
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<td>$510,500</td>
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<td>Sweetwater, TX</td>
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<td>Syracuse, NY</td>
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<tr>
<td>Tahlequah, OK</td>
<td>$1,082</td>
<td>5.53%</td>
<td>98</td>
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<tr>
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<td>$1,266</td>
<td>7.35%</td>
<td>211</td>
<td>$546,900</td>
</tr>
<tr>
<td>Tallahassee, FL</td>
<td>$2,127</td>
<td>8.36%</td>
<td>887</td>
<td>$901,467</td>
</tr>
<tr>
<td>Tampa-St. Petersburg, FL</td>
<td>$1,954</td>
<td>7.42%</td>
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<td>Taos, NM</td>
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<td>The Dalles, OR</td>
<td>$2,292</td>
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<td>The Villages, FL</td>
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<td>Thomaston, GA</td>
<td>$1,535</td>
<td>8.33%</td>
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<td>$1,067</td>
<td>5.05%</td>
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<td>$618,063</td>
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<tr>
<td>Tifton, GA</td>
<td>$2,700</td>
<td>12.42%</td>
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<td>Tocooa, GA</td>
<td>$1,888</td>
<td>9.27%</td>
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<td>$678,169</td>
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<tr>
<td>Toledo, OH</td>
<td>$1,748</td>
<td>7.18%</td>
<td>1,422</td>
<td>$746,392</td>
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<td>Topeka, KS</td>
<td>$1,224</td>
<td>4.64%</td>
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<td>Traverse City, MI</td>
<td>$3,501</td>
<td>12.93%</td>
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<td>$897,552</td>
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<td>Troy, AL</td>
<td>$1,495</td>
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<tr>
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<td>4.55%</td>
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<td>$630,609</td>
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<td>Tucson, AZ</td>
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<td>6.35%</td>
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<td>Tupelo, MS</td>
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<td>13.31%</td>
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<td>$2,299</td>
<td>11.83%</td>
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<td>City</td>
<td>Revenue</td>
<td>Growth Rate</td>
<td>Sales Volume</td>
<td>Revenue Growth</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------</td>
<td>-------------</td>
<td>--------------</td>
<td>----------------</td>
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<td>Van Wert, OH</td>
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<td>9.03%</td>
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<td>7.69%</td>
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<td>$1,204</td>
<td>4.06%</td>
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<td>Warsaw, IN</td>
<td>$1,538</td>
<td>6.02%</td>
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</tr>
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<td>Washington Court House, OH</td>
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<td>9.39%</td>
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<td>$ 913,593</td>
</tr>
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<td>Washington, DC-VA-MD-WV</td>
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<td>4.46%</td>
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<td>Washington, IN</td>
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</tr>
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<td>Washington, NC</td>
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</tr>
<tr>
<td>Waterloo-Cedar Falls, IA</td>
<td>$2,000</td>
<td>7.47%</td>
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<td>Watertown-Fort Drum, NY</td>
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<td>11.26%</td>
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<td>$ 959,896</td>
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<tr>
<td>Watertown, SD</td>
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<td>10.79%</td>
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<td>$ 638,602</td>
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<td>Wauchula, FL</td>
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<td>5.57%</td>
<td>39</td>
<td>$ 584,564</td>
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<tr>
<td>Wausau, WI</td>
<td>$1,601</td>
<td>5.97%</td>
<td>332</td>
<td>$ 656,825</td>
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<tr>
<td>Waycross, GA</td>
<td>$1,956</td>
<td>10.21%</td>
<td>147</td>
<td>$ 725,163</td>
</tr>
<tr>
<td>Weatherford, OK</td>
<td>$1,531</td>
<td>6.37%</td>
<td>95</td>
<td>$ 491,158</td>
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<tr>
<td>Weirton-Steubenville, WV-OH</td>
<td>$1,204</td>
<td>4.84%</td>
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<td>$ 472,740</td>
</tr>
<tr>
<td>Wenatchee, WA</td>
<td>$1,976</td>
<td>7.80%</td>
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<td>$ 651,840</td>
</tr>
<tr>
<td>West Plains, MO</td>
<td>$3,188</td>
<td>17.40%</td>
<td>245</td>
<td>$ 522,722</td>
</tr>
<tr>
<td>Wheeling, WV-OH</td>
<td>$1,877</td>
<td>7.48%</td>
<td>411</td>
<td>$ 661,068</td>
</tr>
<tr>
<td>Whitewater-Elkhorn, WI</td>
<td>$1,665</td>
<td>6.39%</td>
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<td>$ 657,195</td>
</tr>
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<td>Wichita Falls, TX</td>
<td>$1,956</td>
<td>8.10%</td>
<td>355</td>
<td>$ 838,687</td>
</tr>
<tr>
<td>Wichita, KS</td>
<td>$1,518</td>
<td>6.16%</td>
<td>1,422</td>
<td>$ 683,334</td>
</tr>
<tr>
<td>Williamsport, PA</td>
<td>$1,578</td>
<td>6.37%</td>
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<td>$ 609,010</td>
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<tr>
<td>Williston, ND</td>
<td>$3,216</td>
<td>7.14%</td>
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<td>$ 454,035</td>
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<tr>
<td>Willmar, MN</td>
<td>$2,586</td>
<td>9.45%</td>
<td>135</td>
<td>$ 814,941</td>
</tr>
<tr>
<td>Wilmington, NC</td>
<td>$2,254</td>
<td>7.87%</td>
<td>794</td>
<td>$ 778,875</td>
</tr>
</tbody>
</table>
• Wilmington, OH: $2,008 9.43% 121 $ 696,231
• Wilson, NC: $1,746 9.19% 175 $ 820,869
• Winchester, VA-WV: $2,264 8.15% 349 $ 864,103
• Winnemucca, NV: $3,019 9.99% 52 $ 1,034,231
• Winona, MN: $1,624 6.46% 101 $ 828,515
• Winston-Salem, NC: $1,468 5.99% 1,225 $ 785,140
• Wisconsin Rapids-Marshfield, WI: $1,744 6.74% 231 $ 554,442
• Woodward, OK: $2,363 8.88% 110 $ 471,782
• Wooster, OH: $1,113 4.85% 187 $ 686,144
• Worcester, MA-CT: $1,553 4.91% 1,925 $ 751,092
• Worthington, MN: $2,605 10.64% 90 $ 627,744
• Yakima, WA: $1,219 6.23% 449 $ 681,267
• Yankton, SD: $1,852 6.73% 69 $ 612,391
• York-Hanover, PA: $1,422 5.14% 800 $ 783,500
• Youngstown-Warren, OH-PA: $1,476 6.50% 1,115 $ 728,809
• Yuba City, CA: $1,505 7.09% 297 $ 867,451
• Yuma, AZ: $1,259 7.63% 284 $ 893,313
• Zanesville, OH: $1,731 8.20% 187 $ 782,096
• Zapata, TX: $1,070 6.43% 38 $ 416,526

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

## MARKET GROWTH POTENTIAL

### 24.1 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 917 MSAs and μSAs by Nielsen; the data is published in *Restaurant Business*.

### 24.2 Growth Potential for MSAs

The 2015 Restaurant Growth Index for each MSA and μSA is as follows:

<table>
<thead>
<tr>
<th>MSA</th>
<th>RGI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kahului-Wailuku-Lahaina, HI</td>
<td>517</td>
</tr>
<tr>
<td>Kapaa, HI</td>
<td>457</td>
</tr>
<tr>
<td>Las Vegas-Henderson, NV</td>
<td>453</td>
</tr>
<tr>
<td>Sevierville, TN</td>
<td>382</td>
</tr>
<tr>
<td>Starkville, MS</td>
<td>363</td>
</tr>
<tr>
<td>Effingham, IL</td>
<td>333</td>
</tr>
<tr>
<td>Liberal, KS</td>
<td>311</td>
</tr>
<tr>
<td>Ocean City, NJ</td>
<td>306</td>
</tr>
<tr>
<td>Carson City, NV</td>
<td>303</td>
</tr>
<tr>
<td>Honolulu (Urban), HI</td>
<td>292</td>
</tr>
<tr>
<td>Boone, NC</td>
<td>290</td>
</tr>
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<td>Dayton, TN</td>
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<td>Houston-The Woodlands, TX</td>
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24.3 Market Resources
Restaurant Business, 1 Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181. (630) 574-5075. (www.restaurantbusinessonline.com)

PART VI: MARKET SEGMENTS
25.1 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.


Sixty-seven (67) casual-dining chains rank among the 200 largest U.S. restaurant chains, according to Nation’s Restaurant News (June 2015). Their combined annual sales are $47.8 billion; they operate 14,967 units.

Sixty-three percent (63%) of adults eat at traditional casual-dining restaurants at least once a month; 31% eat at upscale-casual-dining restaurants once a month.

25.2 Segment Trends
Few consumer business segments were hit harder by the recent economic woes than casual-dining restaurants. The segment has still not been restored to pre-recession level traffic.

According to The NPD Group, casual-dining traffic declined 2% each year from 2011 through 2015 and was flat in 2015. Weekday traffic was flat in 2014 and 2015, while weekend traffic declined each of these years.

_________________________________________________________________
“Flat is the new up for the casual-dining restaurant segment. It’s been a rough road for casual-dining operators.”
Bonnie Riggs, Analyst
The NPD Group, 4/29/15
_________________________________________________________________
Sales increased 2% each year from 2011 through 2013 and were up 3% in 2014 and 2015, according to The NPD Group. This indicates that while consumers are visiting casual-dining restaurants, they are spending more for each meal.

“It’s not that prices are increasing – prices have actually fallen recently. But customers are more likely to splurge than they had in the past. At the same time, however, there remains a strong component of customers who are still value-conscious.”

Nation’s Restaurant News, 9/14/15

Dinner traffic, which represents 59% of casual-dining traffic, was down 1% in 2015, according to The NPD Group. Lunch visits, which represent 33%, were up 3% in the 12-month period ending June 2015.

“Casual-dining restaurants Increased lunch visits for the first time in five years.”

The NPD Group, 8/18/15

25.3 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. During the past four years, upscale-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.”

*Nation’s Restaurant News*
26.1 Market Assessment

According to the National Restaurant Association (www.restaurant.org) social caterers’ sales were $9.1 billion in 2015, a 5.1% increase over 2014. For comparison, the overall commercial restaurant sector grew 3.8% in 2015.

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.

26.2 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.”

*Nation’s Restaurant News*

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. For chains just entering the catering market, sales are only a small but growing part of revenue. Catering accounts for about 1% of sales at Chipotle Mexican Grill locations that offer catering.

Technomic estimates that catering sales increased at a compound average growth rate (CAGR) of 12% from 2013 through 2016 for fast-casual chains. Quick-service sandwich chains experienced an 8% CAGR.

“Fast-casual chains are leading growth in the catering category, which has increased significantly since the recession. Almost a third of consumers now cater through fast-casual chains.”

*Advertising Age*

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.
26.3 Market Resources
National Association for Catering & Events, 10440 Little Patuxent Parkway, Suite 300, Columbia, MD 21044. (410) 290-5410. (www.nace.net)
27.1 Profile

According to the Specialty Coffee Association of America (www.scaa.org), there are 29,300 coffeeshops in the U.S., 55% of which are independent (three or fewer locations).

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.

27.2 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:

<table>
<thead>
<tr>
<th>Location</th>
<th>Midwest</th>
<th>Northeast</th>
<th>South</th>
<th>West</th>
</tr>
</thead>
<tbody>
<tr>
<td>A diner or sit-down restaurant</td>
<td>55%</td>
<td>42%</td>
<td>46%</td>
<td>47%</td>
</tr>
<tr>
<td>A coffeeshop</td>
<td>34%</td>
<td>41%</td>
<td>28%</td>
<td>42%</td>
</tr>
<tr>
<td>A convenience shop</td>
<td>26%</td>
<td>28%</td>
<td>27%</td>
<td>24%</td>
</tr>
<tr>
<td>A fast-food chain</td>
<td>23%</td>
<td>28%</td>
<td>22%</td>
<td>17%</td>
</tr>
<tr>
<td>A bagel or donut shop</td>
<td>18%</td>
<td>12%</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>At work</td>
<td>14%</td>
<td>8%</td>
<td>11%</td>
<td>14%</td>
</tr>
</tbody>
</table>

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
27.3 **Coffeeshop Chains**

Starbucks, with about 12,000 locations and $13.0 billion in annual sales, dominates the segment.

Caribou Coffee and Peet’s Coffee & Tea, with $286 million and $226 million in annual sales, respectively, are the only other coffeeshop chains ranking among the 200 largest restaurant chains. Both chains were acquired by Joh. A. Benckiser Group in 2012. Combined, the two chains operate about 650 stores.

27.4 **Segment Trends**

A persistent challenge for coffeeshops is how to expand business beyond the morning and early afternoon hours. Starbucks locations report 70% of business is generated 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 has added beer, wine, and food offerings to select stores in the Atlanta, Chicago, and Southern California markets. Food menu includes flatbreads, small plates, and snacks.

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

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

27.5 **Market Resources**

*Coffee Shops Industry Profile*, First Research, January 2016.  
(www.firstresearch.com/Industry-Research/Coffee-Shops.html)

Specialty Coffee Association of America, 117 W. 4th Street, Suite 300, Santa Ana, CA 92701. (562) 624-4100. (www.scaa.org)
28.1 Market Assessment
The National Restaurant Association (www.restaurant.org) the college and university foodservice market in 2015 was $16.0 billion, a 3.6% increase over the previous year.

According to the College Explorer Survey by re:fuel (www.refuelagency.com), college students spent $45 billion on food outside of dormitory foodservice during the 2014-2015 academic year.

28.2 Characteristics Of Campus Dining
The College & University Consumer Trend Report, published 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.
• 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 option 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%
28.3 Best Collegiate Dining

An August 2015 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 the best collegiate dining:

1. Bowdoin College (Brunswick, ME)
2. Columbia University (New York, NY)
3. Johns Hopkins University (Baltimore, MD)
4. Kennesaw State University (Kennesaw, GA)
5. Duke University (Durham, NC)
6. Northwestern University (Evanston, IL)
7. New York University (New York, NY)
8. Occidental College (Los Angeles, CA)
9. Boston University (Boston, MA)
10. Emory University (Atlanta, GA)
11. Cornell University (Ithaca, NY)
12. Mills College (Oakland, CA)
13. University of Massachusetts Amherst (Amherst, MA)
14. Vanderbilt University (Nashville, TN)
15. James Madison University (Harrisonburg, VA)
16. University of Georgia (Athens, GA)
17. University of California Los Angeles (Los Angeles, CA)
18. Miami University (Oxford, OH)
19. Brown University (Providence, RI)
20. University of California San Diego (San Diego, CA)
21. Yale University (New Haven, CT)
22. University of Rochester (Rochester, NY)
23. University of South Carolina (Columbia, SC)
24. Harvard University (Cambridge, MA)
25. St Olaf College (Northfield, MN)
26. Stanford University (Stanford, CA)
27. Pitzer College (Claremont, CA)
28. University of California Berkeley (Berkeley, CA)
29. University of Pennsylvania (Philadelphia, PA)
30. University of San Diego (San Diego, CA)
31. Washington University in St Louis (St Louis, MO)
32. Purdue University (West Lafayette, IN)
33. High Point University (High Point, NC)
34. Virginia Tech (Blacksburg, VA)
35. University of Connecticut (Storrs, CT)
36. University of Chicago (Chicago, IL)
37. Carroll University (Waukesha, WI)
38. Wesleyan University (Middletown, CT)
39. Massachusetts Institute of Technology (Cambridge, MA)
40. Rollins College (Winter Park, FL)
41. Georgia Institute of Technology (Atlanta, GA)
42. Connecticut College (New London, CT)
43. University of California Davis (Davis, CA)
44. Princeton University (Princeton, NJ)
45. Dickinson College (Carlisle, PA)
46. University of Houston (Houston, TX)
47. Harvey Mudd College (Claremont, CA)
48. Muhlenberg College (Allentown, PA)
49. Roger Williams University (Bristol, RI)
50. Brigham Young University (Provo, UT)
51. Middlebury College (Middlebury, VT)
52. Bates College (Lewiston, ME)
53. Northeastern University (Boston, MA)
54. University of California, Santa Barbara (Santa Barbara, CA)
55. Tufts University (Medford, MA)
56. University of North Carolina Chapel Hill (Chapel Hill, NC)
57. University of Delaware (Newark, DE)
58. Ball State University (Muncie, IN)
59. University of Washington (Seattle, WA)
60. Saint Lawrence University (Canton, NY)
61. Saint Anselm College (Manchester, NH)
62. Wheaton College (Wheaton, IL)
63. College of the Atlantic (Bar Harbor, ME)
64. Southern Methodist University (Dallas, TX)
65. Colby College (Waterville, ME)
66. Rhode Island School of Design (Providence, RI)
67. Bryn Mawr College (Bryn Mawr, PA)
68. California State University (Chico, CA)
69. Duquesne University (Pittsburgh, PA)
70. Carleton College (Northfield, MN)
71. California Baptist University (Riverside, CA)
72. University of California, Irvine (Irvine, CA)
73. University of Southern California (Los Angeles, CA)
74. Boston College (Chestnut Hill, MA)
75. Tulane University (New Orleans, LA)
29

**CONTRACT-MANAGED FOODSERVICE**

### 29.1 Profile

According to the National Restaurant Association (www.restaurant.org), food and drink revenue for contract-managed foodservices were $49.5 billion in 2015, a 4.1% increase over 2014. Distribution was follows (change from previous year in parenthesis):

- **Colleges and universities:** $16.0 billion (3.6%)
- **Manufacturing and industrial plants:** $8.3 billion (4.6%)
- **Primary and secondary schools:** $6.8 billion (3.9%)
- **Recreation and sports centers:** $6.8 billion (5.2%)
- **Hospitals and nursing homes:** $6.1 billion (4.8%)
- **Commercial and office buildings:** $3.0 billion (2.9%)
- **In-transit foodservice (airlines):** $2.5 billion (4.0%)

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

Technomic (www.technomic.com) defines the noncommercial segment as foodservice at 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.

29.2 Segment Trends

Technomic assesses the strongest growth 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%).
30

CONVENIENCE STORE FOODSERVICE

30.1 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 as of October 2015.

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.

“Getting good food at the same place you get your gas seems like an oxymoron, but that perception appears to be changing. As more convenience-store chains focus on improving food and beverage quality, they are growing visits and posing a competitive threat to quick-service restaurants.”

Nation’s Restaurant News, 6/15/15

Technomic (www.technomic.com) estimated annual convenience-store foodservice (excluding beverage sales) in 2015 at $11.4 billion, a 2.0% increase over 2014.

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.

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

Five (5) convenience store chains rank among the 200 largest U.S. restaurant and foodservice chains, according to Nation’s Restaurant News (June 2015). Their combined annual sales are $5.5 billion; they operated 14,233 units.

30.2 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%.

_________________________________________________________________

“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

_________________________________________________________________

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.

In a June 2015 survey by NACS, 69% of c-store operators said they are confident in their ability to compete with quick-service restaurants.
30.3 Segment Trends

*Convenience Store Market Intelligence 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.

C-stores have focused on improving the healthfulness of food items. In a June 2015 survey by NACS, 61% of consumers said that convenience stores are offering healthier, nutritious products and serving sizes; least that one-half of customers held this opinion three years prior.

In 2015, Nielsen (www.nielsen.com) assessed annual c-store sales of fresh fruits and vegetables at $362 million, a 10.3% increase from the prior year.

30.4 Food-Forward C-Stores

The NPD Group classifies convenience stores that make food to order, set up their own commissaries, and add restaurant-like seating as ‘food-forward.’ C-store chains in this category include Cumberland Farms, Maverik, QuikTrip, Sheetz, and Wawa.

A 2015 survey by The NPD Group found customer response to food-forward c-stores as follows:

- Fifty-eight percent (58%) of consumers surveyed said they will definitely revisit a food-forward convenience store, compared with 45% who said they will definitely revisit a traditional quick-service restaurant, 43% who said they will definitely revisit a fast-casual restaurant, and 43% who said they will definitely revisit a traditional convenience store.
- More than 56% of food-forward convenience store customers said they visit more than once a month, while only 37% of traditional quick-service customers and 19% of fast-casual customers said the same.
- Nearly 60% of food-forward convenience store visitors said they were very satisfied with their visit, compared with 46% of traditional quick-service visitors, 47% of fast-casual visitors, and 39% of traditional convenience-store visitors.

Food-forward c-stores are rapidly penetrating the pizza marketplace. Servings of pizza ordered by convenience-store customers increased by over 20% in the 12-month period ending February 2015, according to The NPD Group. This contrasts with no
gain in sales at quick-service pizza restaurants, and a 1% increase at traditional quick-service restaurants.

**30.5 Market Resources**
National Association of Convenience Stores (NACS), 1600 Duke Street, 7th Floor, Alexandria, VA 22314. (703) 684-3600. (www.nacsonline.com)
31.1 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 rank among the 200 largest U.S. restaurant chains, according to Nation’s Restaurant News (June 2015). Their combined annual sales are $14.4 billion; they operate 8,705 units.

While the segment’s sales held up during the recession, there has been only slight growth.

“Enhancing menus and remodeling units has paid off slightly for leading family-dining restaurant chains, which often face the challenges of mature brands and have seen little growth in past years.”

Nation’s Restaurant News, 6/15/15

31.2 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.

“Family occasions, breakfast, and affordability are areas where family dining has historically had higher satisfaction than other full-service restaurants, and they still have that.”

Bev Cain, Sr. Vice President
Sandelman & Associates
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FAST-CASUAL RESTAURANTS

32.1 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 Technomic (www.technomic.com), fast-casual was a $37 billion segment in 2015; sales are increasing at a 10% annual rate, the highest of any restaurant segment.

According to The NPD Group (www.npd.com), there were 18,220 fast-casual chain units in the U.S. in 2015, a 6% increase from the prior year.

Thirty-four (34) fast-casual chains rank among the 200 largest U.S. restaurant chains, according to Nation’s Restaurant News (June 2015). Their combined annual sales are $22.7 billion; they operate 14,725 units.

32.2 Market Leaders

Top 150 Fast-Casual Chain Restaurant Report, by Technomic, ranks the top fast-casual brands as follows:

**Asian/Noodle**
- Panda Express
- Pei Wei Asian Dinner
- Noodles & Company
- Pick Up Stix
- Leeann Chin

**Bakery Cafe**
- Panera Bread
- Einstein Bros. Bagels
- Au Bon Pain
- Corner Bakery Cafe
- Bruegger’s

**Burgers**
- Five Guys Burgers and Fries
- Fuddruckers
- Smashburger
- Farmer Boys
- Back Yard Burgers

**Chicken**
- Zaxby's
- El Pollo Loco
- Boston Market
- Wingstop
- Raising Cane’s Chicken Fingers
Italian/Pizza
- Fazoli’s
- Donatos Pizza
- Wolfgang Puck Express
- ZPizza
- Straw Hat Pizza

Mexican
- Chipotle Mexican Grill
- Qdoba Mexican Grill
- Moe’s Southwest Grill
- Taco Cabana
- Baja Fresh Mexican Grill

Sandwich
- Jimmy John’s
- Jason’s Deli
- McAlister’s Deli
- Firehouse Subs
- Jersey Mike’s Subs

Specialty
- Dickey’s Barbecue Pit
- Saladworks
- Shane’s Rib Shack
- Daphne’s California Greek
- Muscle Maker Grill

32.3 Market Trends
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

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.
### 32.4 Comparison of Quick-Service and Fast-Casual

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Fast-Casual</th>
<th>Quick-Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthful/light meal</td>
<td>18%</td>
<td>9%</td>
</tr>
<tr>
<td>Food value/quality</td>
<td>17%</td>
<td>9%</td>
</tr>
<tr>
<td>Price driven</td>
<td>14%</td>
<td>23%</td>
</tr>
<tr>
<td>Someone else chose</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Treating myself</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>Personal loyalty</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Restaurant explorer</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Other reason</td>
<td>10%</td>
<td>18%</td>
</tr>
</tbody>
</table>

According to *The Future of LSR: Fast-Foods & Fast-Casual Restaurants*, 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:

- Sixty-four percent (64%) of consumers visit fast-food restaurants once a week or more. Others visit fast-casual restaurants less frequently, in part, because there are fewer locations and 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.

Consumers say they would like to see more of the following items on LSR menus:

<table>
<thead>
<tr>
<th>Item</th>
<th>Fast-Casual</th>
<th>Quick-Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthy foods</td>
<td>27%</td>
<td>23%</td>
</tr>
<tr>
<td>Salad</td>
<td>26%</td>
<td>24%</td>
</tr>
<tr>
<td>Sandwiches</td>
<td>26%</td>
<td>23%</td>
</tr>
<tr>
<td>Burgers</td>
<td>26%</td>
<td>24%</td>
</tr>
</tbody>
</table>

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.
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FINE DINING

33.1 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.

33.2 Market Trends

No restaurant segment has benefitted more from the uptick in business and leisure travel following the Great Recession than fine-dining. Travelers and tourists represent an average of 29% of sales for fine-dining operators, according to the National Restaurant Association (www.restaurant.org). Americans took 2.1 billion person-trips in 2015, an all-time record, according to the U.S. Travel Association (www.ustravel.org). Traveler spending has also rebounded to pre-recession levels, reaching $930 billion in 2015. The increase in spending has been 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 have increased 4% to 6% each year since 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

33.3 Survey On Fine Dining

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
34.1 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 $5.20.

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.

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“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*
34.2 Market Leaders

According to *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.hmhost.com)
- SSP America (www.foodtravelexperts.com)

34.3 Top Airport Restaurants

GQ (January 2016) rated The 10 Best Airport Restaurants in America as follows:

- Gallagher’s Steak House (Newark Liberty International Airport)
- Ink.Sack (Los Angeles International Airport)
- Matsutake Sushi (Ronald Reagan Washington National Airport and Washington Dulles International Airport)
- One Flew South (Hartsfield-Jackson Atlanta International Airport)
- Pappadeaux Seafood Kitchen (George Bush Intercontinental Airport)
- Shake Shack (John F. Kennedy International Airport)
- Shoyu (Minneapolis-St. Paul International Airport)
- The Salt Lick (Austin-Bergstrom International Airport)
- Tortas Frontera (Chicago O’Hare International Airport)
- Vino Volo (several airport locations)

In 2015, Frommers (www.frommers.com) rated The 10 Best Restaurants in Terminals as follows:

- 42nd Street Oyster Bar (Raleigh-Durham International Airport)
- Custom Burgers by Pat LaFrieda (LaGuardia Airport)
- Deep Blue Sushi (John F. Kennedy International Airport)
- Encounter at LAX (Los Angeles International Airport)
- Ike’s Food and Cocktails (Minneapolis-St. Paul International Airport)
- Ivar’s (Seattle-Tacoma International Airport)
- Legal Sea Foods (Gen. Edward Lawrence Logan International Airport - Boston)
- Obrycki’s (Baltimore-Washington International Thurgood Marshall Airport)
- One Flew South (Hartsfield-Jackson Atlanta International Airport)
- Tortas Frontera (Chicago O’Hare International Airport)

*Food & Wine* 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)

34.4 Market Resources
35

FOOD CONCESSIONS AT SPORTS VENUES

35.1 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 between $15 and $25.

“Aramark, which makes food for 28 U.S. sports arenas, says fans spend about 25% more on food and beverages than they did five years ago. Even as attendance at games has decreased since the recession – down 7% from 2007 – the snacks have become a draw on their own.”

Bloomberg Businessweek, 4/2/15

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

Premium concessions is 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).

Concession sales at Super Bowl games are, by far, the highest among sports events. Per cap spending was $94.50 at the 2014 Super Bowl, at MetLife Stadium. Spending dropped to $72.14 for the 2015 Super Bowl, at University of Phoenix Stadium. Still, with more than $5 million in spending for food and beverage, it was an all-time record for the stadium. The total included some catered functions on plazas and an adjacent park as well as general concessions and premium dining at the stadium.
“This year’s average spending was down significantly in large part because of fewer premium spaces at the facility. MetLife ... has about 150% more than the Glendale venue.”

*SportsBusiness Journal, 2/9/15*

### 35.2 Concessionaires

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

<table>
<thead>
<tr>
<th>Stadiums</th>
<th>General</th>
<th>Premium</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aramark (<a href="http://www.aramark.com">www.aramark.com</a>)</td>
<td>27.0%</td>
<td>24.0%</td>
</tr>
<tr>
<td>Delaware North Sportservice (<a href="http://www.delawarenorth.com">www.delawarenorth.com</a>)</td>
<td>24.3%</td>
<td>21.3%</td>
</tr>
<tr>
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<tr>
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<tr>
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<tr>
<td>Savor (<a href="http://www.savormg.com">www.savormg.com</a>)</td>
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</tr>
<tr>
<td>Others</td>
<td>2.2%</td>
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</tr>
</tbody>
</table>

### 35.3 Best Food At Stadiums And Arenas

The *Daily Meal* (www.thedailymeal.com) ranks 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 at professional stadiums:
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)

Travel + Leisure rates the following as the best professional sports stadiums and arenas for food and beverage concessions:
• Arrowhead Stadium (Kansas City, MO)
• AT&T Park (San Francisco, CA)
• Barclays Center (Brooklyn, NY)
• CenturyLink Field (Seattle, WA)
• Citi Field (New York, NY)
• Cowboys Stadium (Arlington, TX)
• FirstEnergy Stadium (Cleveland, OH)
• Heinz Field (Pittsburgh, PA)
• Madison Square Garden (New York, NY)
• Miller Park (Milwaukee, WI)
• Minute Maid Park (Houston, TX)
• Oriole Park at Camden Yards (Baltimore, MD)
• Robert F. Kennedy Memorial Stadium (Washington, DC)
• Safeco Field (Seattle, WA)
• Target Field (Minneapolis, MN)
• Turner Field (Atlanta, GA)

Hot dogs remain a favorite at ball parks. The Hot Dog & Sausage Council (www.hot-dog.org) estimated that 21.6 million hot dogs were consumed in major league stadiums during the 2015 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
36

FOOD COURTS

36.1 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

36.2 Market Assessment
According to the International Council of Shopping Centers (ICSC, www.icsc.org), mall food court sales are $902 per sq. ft.

36.3 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.

### 36.4 Service Plaza Food Courts

Service plazas have been viewed as 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) renovated 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) redesigned and constructed 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. The project was completed in late 2015.

### 36.5 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)

36.6 Market Resources
International Council of Shopping Centers, 1221 Avenue of the Americas, 41st Floor, New York, NY 10020. (646) 728-3800. (www.icsc.org)
37

FOOD HALLS

37.1 Overview

A blend of the century-old marketplaces of Europe and the 20th century food court, the food hall concept is the hottest format in dining venues.

“Food halls have become impossible to ignore. These ‘food courts for people who hate food courts’ are a major influence in the industry today, even inspiring on-site operators (hospitals, colleges, business) and retailers to take inspiration from the food hall design and atmosphere. For operators and manufacturers, this trend doesn’t necessarily mean you have to be in a food hall, but it does mean you have to pay attention to them and how they are influencing menus and concepts, like food trucks did in the past, while also understanding how food and retail can leverage each other.”

Food Bytes, 12/15

37.2 Popular Food Halls

Foodlife (Chicago, IL; www.foodlifechicago.com) and EatZi’s Market & Bakery (Dallas, TX; www.eatzis.com), both of which opened in the late 1980s, were the first modern marketplace-like restaurant concepts in the U.S.

The renewed attention to food halls is often traced to celebrity chef Mario Batali’s Eataly (www.eataly.com), a 50,000-square-foot, always-crowded mix of restaurants and expensive Italian food products that opened in New York City in 2010. Eataly Chicago
opened in 2012.

Several food halls followed Batali’s successful launch in New York City. These include Hudson Eats (http://brookfieldplaceny.com/directory/food), a food hall of 14 eateries in Brookfield Place (the renamed World Financial Center), The Plaza Food Hall by Todd English (www.theplazany.com/dining/foodhall), the grocery-driven Chelsea Market (www.chelseamarket.com), Gansevoort Market (www.gansmarket.com), Smorgasburg (www.smorgasburg.com) in Brooklyn, and Gotham West Market (www.gothamwestmarket.com).

The Hall (www.thehallsf.com), in San Francisco, is a chic food hall that offers an eclectic array of fare, from Asian to Peruvian.

In Baltimore, the Mount Vernon Marketplace (www.mtvernonmarketplace.com) opened in October 2015 on the ground floor of a new $32 million apartment building.

The Source (www.thesourcedenver.com), an artisan food market that occupies a former 1880’s brick foundry building in Denver’s River North District, opened in 2014.

A former apple-processing plant in Sebastopol, California, was converted into The Barlow (www.thebarlow.net), a 12.5 acre locavore emporium, in 2014.

In Miami Beach, Florida, Jean-Georges Vongerichten’s Market at EDITION (www.jean-georges.com/restaurants/united-states/miami-beach/market), an open-air cafe with a series of bustling counters, offers casual gourmet food around the clock.

In St. Petersburg, Florida, Locale Market (www.localegourmetmarket.com), a curated grocery market operated by chefs Michael Mina and Don Pintabona, opened in December 2015.

Grand Central Market (www.grandcentralmarket.com), a landmark in downtown Los Angeles since 1917, has relaunched as a modern food hall.

Union Market (Washington, DC; www.unionmarketdc.com), with 29 artisan vendors, stands on the site of the 1930s Union Terminal Market.

_________________________________________________________________

“Similar markets have been tourist attractions in Tokyo and Paris for years, but the new crop in the U.S. is geared more toward white-collar workers who want an easy, appetizing lunch without doing much legwork.”

Bloomberg Businessweek, 9/8/15

_________________________________________________________________

37.3 Planned Food Halls

The 100,000 sq. ft. Anthony Bourdain Market on Pier 57 in New York City,
announced in late 2015, will likely become one of the grandest food halls in the U.S. Anthony Bourdain also has plans for a Nordic food hall in New York’s Grand Central Terminal.


A $22 million renovation of Whitehall Mill (www.whitehallmillbaltimore.com) in Baltimore will include an 18,000-square-foot market with a beer hall, Italian grocer, and coffee shop.

R. House (http://r.housebaltimore.com), a $12 million, 10-kitchen food hall that will serve as an incubator concept for 10 up-and-coming chefs, is scheduled to open in Baltimore’s Remington neighborhood in Fall 2016.

“There are dozens of new food halls scheduled to open across the country in the next few years.”

Food Bytes, 12/15
38

FOOD TRUCKS

38.1 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.

According to the 2015 Restaurant Industry Forecast, by the National Restaurant Association (www.restaurant.org), 47% of adults have patronized a food truck. By age, those that have done so are as follows:

• 18-to-34: 56%
• 35-to-44: 54%
• 45-to-54: 48%
• 55-to-64: 48%
• 65 and older: 30%

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

An 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 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.

38.2 City-by-City Assessment

In 2015, Roaming Hunger (www.roaminghunger.com) reported the number of food trucks in major metropolitan areas as follows:
<table>
<thead>
<tr>
<th>City</th>
<th>Total</th>
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<td>Washington, DC:</td>
<td>172</td>
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</tbody>
</table>

### 38.3 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. In Washington DC, food trucks are supposed to vacate once their line of clients clears. In Atlanta and Austin, food trucks have largely been relegated to group parks.
“Miami makes it extremely hard for them to operate, as do Baltimore and Chicago. Rochester, Pittsburgh and San Diego are nearly as stern. In New York City, a cap on the number of food-truck licences available has created a black market, pushing up prices into the thousands of dollars.”

_Economist, 5/24/15_

**38.4 Coexisting With 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.

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%

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, Black Brick Chinese & Dim Sum, and Centro Taco.

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.

### 38.5 Best Food Trucks

The Daily Meal (www.thedailymeal.com), an online resource by Spanfeller Media Group, publishes an annual list of the top 101 restaurants 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.

The list of 101 Best Food Trucks in America 2015 is as follows:

1. Ms. Cheezious Fresh Made Grilled Cheese (Miami, FL)
2. Two for the Road (San Diego, CA)
3. Cousins Maine Lobster (Los Angeles, CA)
4. The Cinnamon Snail (New York, NY)
5. Rickshaw Stop (San Antonio, TX)
6. Oink and Moo (Philadelphia, PA)
7. The Grilled Cheeserie (Nashville, TN)
8. Wok n Roll Food Truck (Cleveland, OH)
9. Emerson Fry Bread (Phoenix, AZ)
10. Kogi BBQ (Los Angeles, CA)
11. SeoulFull Philly (Philadelphia, PA)
12. Korilla BBQ (New York, NY)
13. Cucina Zapata (Philadelphia, PA)
14. Smoke Et Al (Nashville, TN)
15. The Grilled Cheese Truck (Los Angeles, CA)
16. Riffs Fine Street Food (Nashville, TN)
17. Pink Bellies (Charleston, SC)
18. Barrio (Cleveland, OH)
19. Munch Mobile (Boston, MA)
20. Mariscos German (San Diego, CA)
21. Fired Up Taco Truck (Cleveland, OH)
22. Jack’s Chowhound (Dallas, TX)
23. Crepes Bonaparte (Los Angeles, CA)
24. Seoul Taco (St. Louis, MO)
25. Guerrilla Street Food (St. Louis, MO)
26. Easy Slider (Dallas, TX)
27. Border Grill (Los Angeles, CA)
28. Mac Mart Truck (Philadelphia, PA)
30. Guerrilla Tacos (Los Angeles, CA)
31. East Side King (Austin, TX)
32. Bernie's Burger Bus (Houston, TX)
33. Ssahm BBQ (Dallas, TX)
34. Lobsta Truck (Los Angeles and San Francisco, CA)
35. Bonetown Burgers (Boston, MA)
36. Taim Mobile (New York, NY)
37. The Taco Truck (multiple locations in New Jersey)
38. Oh My Gogi! BBQ (Houston, TX)
39. Go Gyro Go (St. Louis, MO)
40. Bon Me (Boston, MA)
41. Roxy's Gourmet Grilled Cheese (Boston, MA)
42. The Bacon Truck (Boston, MA)
43. Roti Rolls (Charleston, SC)
44. Pepe (Washington, DC)
45. Stoked Wood Fired Pizza Co (Boston, MA)
46. Foolish Waffles (Philadelphia, PA)
47. Red Hook Lobster Pound (New York, NY)
48. KoJa Kitchen (San Francisco, CA)
49. Cha Cha Chow (St. Louis, MO)
50. Tasty Kabob (Washington, DC)
51. Bacon Bacon (San Francisco, CA)
52. Dapper Dog (Philadelphia, PA)
53. Coreanos (Houston, TX)
54. Mei Mei Boston (Boston, MA)
55. The Dining Car (Boston, MA)
56. Hey!...You Gonna Eat or What (Austin, TX)
57. Nelly Belly Food Truck (Cleveland, OH)
58. The Blaxican (Atlanta, GA)
59. Streetza (Milwaukee, WI)
60. Jefe's Original Fish Taco & Burgers (Miami, FL)
61. The Spread (Cleveland, OH)
62. The Lime Truck (Los Angeles, CA)
63. Clover Food Lab (Boston, MA)
64. Fukuburger Truck (Las Vegas, NV)
65. Nammi Truck (Dallas, TX)
66. Butter Truck (Philadelphia, PA)
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<thead>
<tr>
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</tr>
</thead>
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<td>68.</td>
<td>Pierogi Street</td>
<td>Chicago, IL</td>
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<td>Señor Sisig</td>
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<tr>
<td>70.</td>
<td>Red Hook Lobster Truck</td>
<td>Washington, DC</td>
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<td>Urban Street Grill</td>
<td>Greensboro, NC</td>
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<td>Food Shark</td>
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<td>Komodo Truck</td>
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</tr>
<tr>
<td>77.</td>
<td>The Vegan Food Truck by Ste Martaen</td>
<td>Chicago, IL</td>
</tr>
<tr>
<td>78.</td>
<td>The Chairman</td>
<td>San Francisco, CA</td>
</tr>
<tr>
<td>79.</td>
<td>Where Ya At Matt.</td>
<td>Seattle, WA</td>
</tr>
<tr>
<td>80.</td>
<td>Frencheese</td>
<td>New Orleans, LA</td>
</tr>
<tr>
<td>81.</td>
<td>Love Balls</td>
<td>Austin, TX</td>
</tr>
<tr>
<td>82.</td>
<td>Pennypackers</td>
<td>Boston, MA</td>
</tr>
<tr>
<td>83.</td>
<td>Uyghur Kitchen</td>
<td>Boston, MA</td>
</tr>
<tr>
<td>84.</td>
<td>Kaiteki Ramen</td>
<td>Oklahoma City, OK</td>
</tr>
<tr>
<td>85.</td>
<td>People’s Food Truck</td>
<td>Atlanta, GA</td>
</tr>
<tr>
<td>86.</td>
<td>Longshot Lobsta</td>
<td>Louisville, KY</td>
</tr>
<tr>
<td>87.</td>
<td>Taceaux Loceaux</td>
<td>New Orleans, LA</td>
</tr>
<tr>
<td>88.</td>
<td>TruckU Barbeque</td>
<td>Las Vegas, LV</td>
</tr>
<tr>
<td>89.</td>
<td>Basic Kneads Pizza</td>
<td>Denver, CO</td>
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<tr>
<td>90.</td>
<td>Sheherazad</td>
<td>Boston, MA</td>
</tr>
<tr>
<td>91.</td>
<td>Thoroughfare Food</td>
<td>Greenville, SC</td>
</tr>
<tr>
<td>92.</td>
<td>Scratch Truck</td>
<td>Indianapolis, IN</td>
</tr>
<tr>
<td>93.</td>
<td>The Fat Shallot</td>
<td>Chicago, IL</td>
</tr>
<tr>
<td>94.</td>
<td>Liba Falafel Truck</td>
<td>San Francisco, CA</td>
</tr>
<tr>
<td>95.</td>
<td>Arepa Zone</td>
<td>Washington, DC</td>
</tr>
<tr>
<td>96.</td>
<td>Rigatoni’s Mobile Crab Cakes</td>
<td>Philadelphia, PA</td>
</tr>
<tr>
<td>97.</td>
<td>Solber Pupusas</td>
<td>New York, NY</td>
</tr>
<tr>
<td>98.</td>
<td>Snowday</td>
<td>New York, NY</td>
</tr>
<tr>
<td>99.</td>
<td>Dim Ssâm à Gogo by Sakaya Kitchen</td>
<td>Miami, FL</td>
</tr>
<tr>
<td>100.</td>
<td>Foodie Call</td>
<td>New Orleans, LA</td>
</tr>
<tr>
<td>101.</td>
<td>Swizzler Gourmet Hot Dogs</td>
<td>Washington, DC</td>
</tr>
</tbody>
</table>

**38.6 Market Resources**

Roaming Hunger provides a directory of food trucks in 37 metropolitan areas at [www.roaminghunger.com](http://www.roaminghunger.com)

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

Over three billion pizzas were sold in the United States in 2015, according to the National Association of Pizza Operators (NAPO, www.pizzatoday.com).

CHD Expert (www.chd-expert.com) assessed the annual 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.

Thirteen (13) pizza chains rank among the 200 largest U.S. restaurant chains, according to Nation’s Restaurant News (June 2015). Their combined annual sales are $19.0 billion; they operate 25,710 units.

There are 61,269 pizzerias in the United States, according to American Business Lists (www.americanbusinesslists.com).

Pizza consumption is assessed in Section 21.10 of this handbook.

39.2 Segment Trends

According to the Pizza Consumer Trend Report, published by Technomic (www.technomic.com), 41% of consumers eat pizza once a week.

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.

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.

_________________________________________________________________

“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

_________________________________________________________________

39.3 Takeout And Delivery
The convenience provided by takeout and delivery remains a major driver in the pizza marketplace.

According to Datassential (www.datassential.com), 53% of pizza is taken to-go, 28% is delivered, and 19% is eaten in the restaurant.

Seventy percent (70%) of Domino’s business is delivery; online ordering represents 25% of sales.

39.4 Fast-Casual Pizza Chains
Several pizza chains operating in a fast-casual format have recently launched. These include Blaze Fast-Fire’d Pizza (Pasadena, CA), Mod Pizza (Seattle, WA), Pie Five Pizza Co. (The Colony, TX), Pieology (Rancho Santa Margarita, CA), Pizzarev (Los Angeles, CA), The Pizza Studio (Los Angeles, CA), Top That! Pizza (Tulsa, OK), Uncle Maddio’s Pizza (Atlanta, GA), Your Pie (Athens, 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.
“The fast-casual pizza niche is one of the hottest in the industry, with a number of well-funded players racing to capture the best real estate and key markets. It’s too early to say which brand will become the first national fast-casual pizza chain – offering individual pies that are made to order by guests as they walk a service line, in the style of Chipotle Mexican Grill, and baked in minutes. Their models are very similar. Most emphasize a made-from-scratch crust and the use of locally sourced and high-quality ingredients that result in a premium pie. In addition to pizza, most also offer salads, and some have desserts, beer, and wine.”

*Nation’s Restaurant News, 5/12/15*

### 39.5 Customer Priorities

Surveys conducted in 2015 by Datassential asked consumers the most important attributes when selecting a pizzeria. Responses were as follows:

- Great taste: 90%
- Clean and sanitary food/beverage areas: 82%
- Quantity of toppings, meats, cheese, etc.: 82%
- Pizza is made fresh-to-order: 81%
- Quality of the crust: 81%
- Best value: 80%
- Consistency: 75%
- Convenient location: 74%
- Preferred pizza style: 69%
- Lowest prices overall: 62%
- Coupons: 59%
- Delivery available: 53%
- Reviews, recommendations: 53%
- Upscale, gourmet varieties: 46%
- Restaurant atmosphere, ambience: 46%
- Open longer, late-night hours: 43%
• In-store seating available: 42%
• Healthier food options available: 42%
• Drink/meal combo: 40%
• Rewards/loyalty program: 38%
• All natural, organic, local ingredients: 36%
• Kids menu: 27%
• Gluten-free offerings: 22%

39.6 Customer Loyalty
A series of surveys conducted in January 2015 by Market Force Information (www.marketforce.com) queried over 12,500 consumers about their loyalty to various restaurants. Rankings of pizza chains are as follows:
• Papa Murphy’s: 71%
• Pizza Ranch: 64%
• Papa John’s: 49%
• Domino’s Pizza: 49%
• CiCi’s Pizza: 45%
• Little Caesar’s: 45%
• Pizza Hut: 44%

39.7 Market Resources
QUICK-SERVICE RESTAURANTS

40.1 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%.

Forty-two (42) quick-service chains rank among the 200 largest U.S. restaurant chains, according to Nation’s Restaurant News (June 2015). Their combined annual sales are $118.4 billion; they operate 100,268 units.

40.2 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
The highest percentages of adults who eat fast-food 20 or more times per month:

- Dallas, TX: 34.0%
- McAllen, TX: 40.1%
- 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%

40.3 Customer Selection Priorities

Surveys conducted in January-March 2015 by Sandelman & Associates asked consumers the attributes they consider important when selecting a QSR. Responses by age demographic were as follows:
40.4 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.

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 restaurant designs, and KFC has developed an “innovation restaurant” called KFC Eleven.

QSRs are also cutting the number of menu items to increase service speed and efficiency. According to Datassential (www.datassential.com), QSR chains offered an average of 85.6 menu items in 2015, down from 94 items in 2008.

“A fast-casual and new quick-service chains are entering the market with narrower, more specialized items. The shift toward narrower menus is coming amid a demassification of the restaurant industry. Consumers are gravitating toward specialty concepts and away from chains with broader menus. And chains with broad menus aimed at large swaths of customers are ceding business to those specialty chains.”

Nation’s Restaurant News, 8/24/15

A comparison of QSRs and fast-casual restaurants is presented in Section 32.4 of this handbook.
41.1 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

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 report by The NPD Group, projects HMR spending increase 10% annually 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

41.2 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

41.3 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 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.

41.4 Market Trends
According to the *Retailer Meal Solutions Consumer Trend Report*, 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 by heading back to restaurants.”

Darren Tristano, President
Technomic

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 VII: MARKET LEADERS
LARGEST RESTAURANT CHAINS

42.1 Overview

*Top 500 Chain Restaurant Report*, an annual publication by Technomic (www.technomic.com), provides a comprehensive analysis of the U.S. chain restaurant industry. This chapter identifies the largest chains in eight segments based on this report.

42.2 Largest Chains By Segment

**Bakery Cafe Chains**
- 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 Madeleine 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

**Burger Chains**
- 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                        | Kidd Valley                     |
| Canyons Burger Company           | Krystal Company                 |
| Carl’s Jr.                       | Larkburger                     |
| Central Park USA                 | M Burger                       |
| Checkers Drive-In Restaurants    | Martin’s Restaurants           |
| Cheeseburger Bobby’s            | McDonald’s                     |
| Cheeseburger Charley’s           | Meatheads Burgers & Fries      |
| Culver’s                         | Mighty Fine Burgers, Fries & Shakes |
| Elevation Burger                 | Mooyah Burgers & Fries         |
| Evos’...Feel Great Fast Food     | Original Hamburger Stand       |
| Farmer Boys                      | Pal’s Sudden Service           |
| Fatburger                        | Rally’s Hamburgers             |
| Five Guys Burgers and Fries      | Remington Grill                |
| Flamers Burgers and Chicken      | Schoop’s Hamburgers            |
| Foster’s Grille                  | Shake Shack                    |
| Freddy’s Frozen Custard & Steakburgers | Showmats Restaurant |
| Fuddruckers                      | Smashburger                    |
| Good Times Burgers & Frozen Custard | Sonic Drive-Ins               |
| Hardee’s                         | Spangles                      |
| Iceberg Drive Inn                | The Counter                    |
| In-N-Out Burger                  | The Habit Burger Grill         |
| Jack in the Box                  | Umami Burger                   |
| Jack’s                            | Village Burger Bar             |
| Jake’s Wayback Burgers           | Ward’s Food Systems            |
| Johnnie’s Charcoal Broiler       | Wendy’s                       |
| Johnny’s Lunch                   | Whataburger                    |
| Jollibee                          | White Castle                   |
|                                  | Wild Willy’s Burgers           |

**Family-Dining Chains**

| Bakers Square                     | First Watch                     |
| Big Boy Restaurants               | Friendly’s                      |
| Bob Evans Restaurants             | Golden Corral Buffet & Grill    |
| Carrows                           | Huddle House                    |
| Coco’s Bakery Restaurant          | IHOP                            |
| Country Kitchen                   | Luby’s                          |
| Country Market Restaurant & Buffet | Marie Callender’s Restaurant & Bakery |
| Cracker Barrel Old Country Store  | Mimi’s Cafe                     |
| Denny’s                           | Old Country Buffet/HomeTown Buffet |
| Eat’n Park                        |                                |
| Elmer’s                           |                                |
| Perkins Restaurant & Bakery                  | Sizzler          |
| Ryan's                                      | The Original Pancake House |
| Shari's Restaurants                         | Village Inn      |
| Shoney's                                    | Waffle House     |

**Fast-Casual Chains**

- 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
- Cosí
- 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 Country French Cafe
- 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

Mexican Restaurant Chains
• 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

• 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
Pizza Chains

- 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
- Breadaux Pizza
- Brixx Wood Fired Pizza
- Buck’s Pizza
- Carbone’s Pizzeria
- Cassano’s
- Chandelio’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
zpizzac

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
zpizzac

Sandwich Chains
• 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
• Boeymonger Deli
• Buona Beef
• Capriottis 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
Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606.
(312) 876-0004. (www.technomic.com)
43

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 2015):

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Sales</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>McDonald’s</td>
<td>$35.44 billion</td>
<td>14,350</td>
</tr>
<tr>
<td>Starbucks Coffee</td>
<td>$13.01 billion</td>
<td>11,939</td>
</tr>
<tr>
<td>Subway</td>
<td>$12.26 billion</td>
<td>26,530</td>
</tr>
<tr>
<td>Burger King</td>
<td>$  8.63 billion</td>
<td>7,129</td>
</tr>
<tr>
<td>Wendy’s</td>
<td>$  8.56 billion</td>
<td>5,750</td>
</tr>
<tr>
<td>Taco Bell</td>
<td>$  8.20 billion</td>
<td>5,921</td>
</tr>
<tr>
<td>Dunkin’ Donuts</td>
<td>$  7.17 billion</td>
<td>8,082</td>
</tr>
<tr>
<td>Chick-fil-A</td>
<td>$  5.71 billion</td>
<td>1,871</td>
</tr>
<tr>
<td>Pizza Hut</td>
<td>$  5.50 billion</td>
<td>7,863</td>
</tr>
<tr>
<td>Applebee’s Neighborhood Grill &amp; Bar:</td>
<td>$  4.57 billion</td>
<td>1,870</td>
</tr>
<tr>
<td>Panera Bread</td>
<td>$  4.26 billion</td>
<td>1,759</td>
</tr>
<tr>
<td>KFC</td>
<td>$  4.20 billion</td>
<td>4,370</td>
</tr>
<tr>
<td>Domino’s</td>
<td>$  4.11 billion</td>
<td>5,067</td>
</tr>
<tr>
<td>Chipotle Mexican Grill</td>
<td>$  4.06 billion</td>
<td>1,775</td>
</tr>
<tr>
<td>Sonic America’s Drive-In</td>
<td>$  4.03 billion</td>
<td>3,518</td>
</tr>
<tr>
<td>Olive Garden</td>
<td>$  3.76 billion</td>
<td>840</td>
</tr>
<tr>
<td>Chili’s Grill &amp; Bar</td>
<td>$  3.63 billion</td>
<td>1,263</td>
</tr>
<tr>
<td>Little Caesars</td>
<td>$  3.40 billion</td>
<td>4,083</td>
</tr>
<tr>
<td>Buffalo Wild Wings Grill &amp; Bar</td>
<td>$  3.23 billion</td>
<td>1,052</td>
</tr>
<tr>
<td>Dairy Queen</td>
<td>$  3.19 billion</td>
<td>4,446</td>
</tr>
<tr>
<td>Jack in the Box</td>
<td>$  3.17 billion</td>
<td>2,249</td>
</tr>
<tr>
<td>Arby’s</td>
<td>$  3.17 billion</td>
<td>3,226</td>
</tr>
<tr>
<td>IHOP</td>
<td>$  2.93 billion</td>
<td>1,579</td>
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<tr>
<td>Papa John’s Pizza</td>
<td>$  2.68 billion</td>
<td>3,250</td>
</tr>
<tr>
<td>Denny’s</td>
<td>$  2.53 billion</td>
<td>1,596</td>
</tr>
<tr>
<td>Restaurant</td>
<td>Revenue</td>
<td>Number of Locations</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>----------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Outback Steakhouse</td>
<td>$2.48 billion</td>
<td>752</td>
</tr>
<tr>
<td>Popeyes Louisiana Kitchen</td>
<td>$2.41 billion</td>
<td>1,870</td>
</tr>
<tr>
<td>Red Lobster</td>
<td>$2.37 billion</td>
<td>678</td>
</tr>
<tr>
<td>Panda Express</td>
<td>$2.24 billion</td>
<td>1,708</td>
</tr>
<tr>
<td>Cracker Barrel Old Country Store</td>
<td>$2.13 billion</td>
<td>633</td>
</tr>
<tr>
<td>7-Eleven</td>
<td>$2.11 billion</td>
<td>7,309</td>
</tr>
<tr>
<td>Hardee's</td>
<td>$2.05 billion</td>
<td>1,771</td>
</tr>
<tr>
<td>Texas Roadhouse</td>
<td>$1.87 billion</td>
<td>438</td>
</tr>
<tr>
<td>Whataburger</td>
<td>$1.80 billion</td>
<td>774</td>
</tr>
<tr>
<td>The Cheesecake Factory</td>
<td>$1.78 billion</td>
<td>176</td>
</tr>
<tr>
<td>TGI Fridays</td>
<td>$1.77 billion</td>
<td>507</td>
</tr>
<tr>
<td>Jimmy John's Gourmet Sandwiches</td>
<td>$1.75 billion</td>
<td>2,109</td>
</tr>
<tr>
<td>Golden Corral</td>
<td>$1.73 billion</td>
<td>500</td>
</tr>
<tr>
<td>LongHorn Steakhouse</td>
<td>$1.54 billion</td>
<td>479</td>
</tr>
<tr>
<td>Carl's Jr.</td>
<td>$1.52 billion</td>
<td>1,142</td>
</tr>
<tr>
<td>Red Robin Gourmet Burgers &amp; Brews</td>
<td>$1.43 billion</td>
<td>496</td>
</tr>
<tr>
<td>Zaxby's</td>
<td>$1.25 billion</td>
<td>658</td>
</tr>
<tr>
<td>Wawa</td>
<td>$1.22 billion</td>
<td>678</td>
</tr>
<tr>
<td>Five Guys Burgers and Fries</td>
<td>$1.20 billion</td>
<td>1,163</td>
</tr>
<tr>
<td>Ruby Tuesday</td>
<td>$1.18 billion</td>
<td>694</td>
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<tr>
<td>Waffle House</td>
<td>$1.11 billion</td>
<td>1,840</td>
</tr>
<tr>
<td>Culver's</td>
<td>$1.03 billion</td>
<td>528</td>
</tr>
<tr>
<td>Bojangles' Famous Chicken 'n Biscuits</td>
<td>$1.03 billion</td>
<td>622</td>
</tr>
<tr>
<td>Bob Evans Restaurants</td>
<td>$959 million</td>
<td>566</td>
</tr>
<tr>
<td>Steak 'n Shake</td>
<td>$952 million</td>
<td>536</td>
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<tr>
<td>P.F. Chang's China Bistro</td>
<td>$881 million</td>
<td>213</td>
</tr>
<tr>
<td>Church's Chicken</td>
<td>$861 million</td>
<td>1,168</td>
</tr>
<tr>
<td>BJ's Restaurant &amp; Brewhouse</td>
<td>$845 million</td>
<td>156</td>
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<tr>
<td>Papa Murphy's Take 'N' Bake Pizza</td>
<td>$841 million</td>
<td>1,433</td>
</tr>
<tr>
<td>Hooters</td>
<td>$837 million</td>
<td>340</td>
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<tr>
<td>Circle K</td>
<td>$787 million</td>
<td>3,908</td>
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<tr>
<td>Casey's General Stores</td>
<td>$776 million</td>
<td>1,860</td>
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<tr>
<td>In-N-Out Burger</td>
<td>$751 million</td>
<td>299</td>
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<tr>
<td>El Pollo Loco</td>
<td>$723 million</td>
<td>415</td>
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<tr>
<td>Carrabba's Italian Grill</td>
<td>$714 million</td>
<td>243</td>
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<tr>
<td>Logan's Roadhouse</td>
<td>$711 million</td>
<td>260</td>
</tr>
<tr>
<td>Costco</td>
<td>$670 million</td>
<td>455</td>
</tr>
<tr>
<td>Cheddar's</td>
<td>$668 million</td>
<td>157</td>
</tr>
<tr>
<td>Qdoba Mexican Grill</td>
<td>$667 million</td>
<td>634</td>
</tr>
<tr>
<td>Wingstop</td>
<td>$664 million</td>
<td>671</td>
</tr>
<tr>
<td>Krispy Kreme Doughnuts</td>
<td>$659 million</td>
<td>278</td>
</tr>
<tr>
<td>Del Taco</td>
<td>$655 million</td>
<td>546</td>
</tr>
<tr>
<td>Tim Hortons</td>
<td>$650 million</td>
<td>884</td>
</tr>
<tr>
<td>California Pizza Kitchen</td>
<td>$634 million</td>
<td>209</td>
</tr>
<tr>
<td>Restaurant</td>
<td>Revenue</td>
<td>LTM Growth</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-----------</td>
<td>------------</td>
</tr>
<tr>
<td>Perkins Restaurant &amp; Bakery</td>
<td>$629 million</td>
<td>391</td>
</tr>
<tr>
<td>Bonefish Grill</td>
<td>$622 million</td>
<td>206</td>
</tr>
<tr>
<td>Jason’s Deli</td>
<td>$617 million</td>
<td>253</td>
</tr>
<tr>
<td>Boston Market</td>
<td>$602 million</td>
<td>456</td>
</tr>
<tr>
<td>Sheetz</td>
<td>$588 million</td>
<td>478</td>
</tr>
<tr>
<td>Moe’s Southwest Grill</td>
<td>$571 million</td>
<td>581</td>
</tr>
<tr>
<td>Ruth’s Chris Steak House</td>
<td>$559 million</td>
<td>121</td>
</tr>
<tr>
<td>Long John Silver’s</td>
<td>$555 million</td>
<td>815</td>
</tr>
<tr>
<td>Firehouse Subs</td>
<td>$544 million</td>
<td>840</td>
</tr>
<tr>
<td>Baskin-Robbins</td>
<td>$544 million</td>
<td>2,484</td>
</tr>
<tr>
<td>White Castle</td>
<td>$528 million</td>
<td>391</td>
</tr>
<tr>
<td>Jersey Mike’s Subs</td>
<td>$525 million</td>
<td>857</td>
</tr>
<tr>
<td>O’Charley’s</td>
<td>$521 million</td>
<td>214</td>
</tr>
<tr>
<td>Jamba Juice</td>
<td>$513 million</td>
<td>806</td>
</tr>
<tr>
<td>McAlister’s Deli</td>
<td>$505 million</td>
<td>337</td>
</tr>
<tr>
<td>Target Cafe (Target stores)</td>
<td>$503 million</td>
<td>1,774</td>
</tr>
<tr>
<td>Captain D’s Seafood Kitchen</td>
<td>$499 million</td>
<td>511</td>
</tr>
<tr>
<td>Einstein Bros. Bagels</td>
<td>$498 million</td>
<td>758</td>
</tr>
<tr>
<td>Famous Dave’s</td>
<td>$496 million</td>
<td>186</td>
</tr>
<tr>
<td>Auntie Anne’s</td>
<td>$492 million</td>
<td>1,171</td>
</tr>
<tr>
<td>Checkers</td>
<td>$492 million</td>
<td>507</td>
</tr>
<tr>
<td>Yard House</td>
<td>$478 million</td>
<td>59</td>
</tr>
<tr>
<td>Noodles &amp; Company</td>
<td>$465 million</td>
<td>439</td>
</tr>
<tr>
<td>CiCi’s Pizza</td>
<td>$441 million</td>
<td>452</td>
</tr>
<tr>
<td>Joe’s Crab Shack</td>
<td>$433 million</td>
<td>139</td>
</tr>
<tr>
<td>Raising Cane’s Fingers</td>
<td>$415 million</td>
<td>208</td>
</tr>
<tr>
<td>Krystal</td>
<td>$408 million</td>
<td>354</td>
</tr>
<tr>
<td>Maggiano’s Little Italy</td>
<td>$407 million</td>
<td>49</td>
</tr>
<tr>
<td>The Capital Grille</td>
<td>$405 million</td>
<td>55</td>
</tr>
<tr>
<td>Round Table Pizza</td>
<td>$399 million</td>
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</tr>
<tr>
<td>Big Boy/Frisch’s Big Boy</td>
<td>$388 million</td>
<td>225</td>
</tr>
<tr>
<td>Friendly’s</td>
<td>$384 million</td>
<td>280</td>
</tr>
<tr>
<td>Chuck E. Cheese’s</td>
<td>$368 million</td>
<td>545</td>
</tr>
<tr>
<td>Cold Stone Creamery</td>
<td>$364 million</td>
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</tr>
<tr>
<td>On the Border Mexican Grill &amp; Cantina</td>
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<tr>
<td>Corner Bakery Cafe</td>
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<tr>
<td>Dickey’s Barbecue Pit</td>
<td>$355 million</td>
<td>515</td>
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<tr>
<td>Au Bon Pain</td>
<td>$354 million</td>
<td>210</td>
</tr>
<tr>
<td>Dave &amp; Buster’s</td>
<td>$354 million</td>
<td>72</td>
</tr>
<tr>
<td>Taco John’s</td>
<td>$347 million</td>
<td>393</td>
</tr>
<tr>
<td>Village Inn</td>
<td>$347 million</td>
<td>210</td>
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<tr>
<td>Pei Wei Asian Diner</td>
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<td>201</td>
</tr>
<tr>
<td>Quiznos</td>
<td>$342 million</td>
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</tr>
<tr>
<td>Romano’s Macaroni Grill</td>
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<td>158</td>
</tr>
<tr>
<td>Restaurant Name</td>
<td>Revenue (Million)</td>
<td>Market Share (Points)</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>-------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Potbelly Sandwich Works</td>
<td>$339 million</td>
<td>351</td>
</tr>
<tr>
<td>Marco’s Pizza</td>
<td>$337 million</td>
<td>578</td>
</tr>
<tr>
<td>Hungry Howie’s Pizza</td>
<td>$327 million</td>
<td>551</td>
</tr>
<tr>
<td>Portillo’s</td>
<td>$317 million</td>
<td>38</td>
</tr>
<tr>
<td>Miller’s Ale House</td>
<td>$317 million</td>
<td>70</td>
</tr>
<tr>
<td>Taco Cabana</td>
<td>$314 million</td>
<td>174</td>
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<tr>
<td>Pollo Tropical</td>
<td>$308 million</td>
<td>129</td>
</tr>
<tr>
<td>Schlotzsky’s</td>
<td>$300 million</td>
<td>347</td>
</tr>
<tr>
<td>Benihana of Tokyo</td>
<td>$298 million</td>
<td>72</td>
</tr>
<tr>
<td>Sam’s Cafe (Walmart stores)</td>
<td>$293 million</td>
<td>636</td>
</tr>
<tr>
<td>Mimi’s Cafe</td>
<td>$289 million</td>
<td>104</td>
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<tr>
<td>Barnes &amp; Noble Cafe</td>
<td>$287 million</td>
<td>647</td>
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<tr>
<td>Caribou Coffee</td>
<td>$286 million</td>
<td>398</td>
</tr>
<tr>
<td>Charley’s Grilled Subs</td>
<td>$281 million</td>
<td>445</td>
</tr>
<tr>
<td>Ninety Nine Restaurant &amp; Pub</td>
<td>$280 million</td>
<td>104</td>
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<tr>
<td>Sbarro, the Italian Eatery</td>
<td>$279 million</td>
<td>353</td>
</tr>
<tr>
<td>Fleming’s Prime Steakhouse &amp; Wine Bar</td>
<td>$275 million</td>
<td>66</td>
</tr>
<tr>
<td>Uno Chicago Grill/Pizzeria Uno</td>
<td>$274 million</td>
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</tr>
<tr>
<td>Stripes</td>
<td>$271 million</td>
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<tr>
<td>Morton’s the Steakhouse</td>
<td>$264 million</td>
<td>65</td>
</tr>
<tr>
<td>Rally’s Hamburgers</td>
<td>$264 million</td>
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</tr>
<tr>
<td>Fuddruckers</td>
<td>$261 million</td>
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<tr>
<td>Buca di Beppo</td>
<td>$261 million</td>
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<tr>
<td>HomeTown Buffet</td>
<td>$259 million</td>
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<tr>
<td>Shoney’s</td>
<td>$259 million</td>
<td>163</td>
</tr>
<tr>
<td>Sonny’s Real Pit Bar-B-Q</td>
<td>$258 million</td>
<td>119</td>
</tr>
<tr>
<td>Smashburger</td>
<td>$256 million</td>
<td>288</td>
</tr>
<tr>
<td>Brio Tuscan Grille</td>
<td>$255 million</td>
<td>62</td>
</tr>
<tr>
<td>Saltgrass Steak House</td>
<td>$247 million</td>
<td>52</td>
</tr>
<tr>
<td>Chuy’s</td>
<td>$245 million</td>
<td>59</td>
</tr>
<tr>
<td>Braum’s Ice Cream and Dairy Stores</td>
<td>$243 million</td>
<td>279</td>
</tr>
<tr>
<td>Godfather’s Pizza</td>
<td>$242 million</td>
<td>571</td>
</tr>
<tr>
<td>Huddle House</td>
<td>$241 million</td>
<td>370</td>
</tr>
<tr>
<td>Seasons 52</td>
<td>$239 million</td>
<td>43</td>
</tr>
<tr>
<td>Luby’s Cafeteria</td>
<td>$238 million</td>
<td>94</td>
</tr>
<tr>
<td>Sizzler</td>
<td>$235 million</td>
<td>127</td>
</tr>
<tr>
<td>Old Chicago</td>
<td>$235 million</td>
<td>97</td>
</tr>
<tr>
<td>Legal Sea Foods</td>
<td>$233 million</td>
<td>34</td>
</tr>
<tr>
<td>Wienerschnitzel</td>
<td>$232 million</td>
<td>322</td>
</tr>
<tr>
<td>Ryan’s Grill, Buffet &amp; Bakery</td>
<td>$229 million</td>
<td>121</td>
</tr>
<tr>
<td>Twin Peaks</td>
<td>$226 million</td>
<td>63</td>
</tr>
<tr>
<td>Smoothie King</td>
<td>$226 million</td>
<td>590</td>
</tr>
<tr>
<td>Peet’s Coffee &amp; Tea</td>
<td>$226 million</td>
<td>238</td>
</tr>
<tr>
<td>Johnny Rockets</td>
<td>$225 million</td>
<td>203</td>
</tr>
<tr>
<td>Restaurant</td>
<td>Annual Revenue</td>
<td>Market Share</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>----------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Sarku Japan</td>
<td>$223 million</td>
<td>231</td>
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<tr>
<td>Fazoli’s</td>
<td>$219 million</td>
<td>212</td>
</tr>
<tr>
<td>McCormick &amp; Schmick’s</td>
<td>$217 million</td>
<td>57</td>
</tr>
<tr>
<td>Houlihan’s</td>
<td>$215 million</td>
<td>76</td>
</tr>
<tr>
<td>Old Country Buffet</td>
<td>$214 million</td>
<td>89</td>
</tr>
<tr>
<td>Carino’s Italian</td>
<td>$214 million</td>
<td>97</td>
</tr>
<tr>
<td>Bar Louie</td>
<td>$213 million</td>
<td>92</td>
</tr>
<tr>
<td>Beef ‘O’ Brady’s Family Sports Pub</td>
<td>$212 million</td>
<td>200</td>
</tr>
<tr>
<td>Rubio’s Fresh Mexican Grill</td>
<td>$211 million</td>
<td>193</td>
</tr>
<tr>
<td>Pizza Ranch</td>
<td>$211 million</td>
<td>188</td>
</tr>
<tr>
<td>Bahama Breeze</td>
<td>$210 million</td>
<td>37</td>
</tr>
<tr>
<td>Tropical Smoothie Cafe</td>
<td>$209 million</td>
<td>411</td>
</tr>
<tr>
<td>Taco Bueno</td>
<td>$208 million</td>
<td>174</td>
</tr>
<tr>
<td>Rainforest Cafe</td>
<td>$206 million</td>
<td>23</td>
</tr>
<tr>
<td>Hard Rock Cafe</td>
<td>$205 million</td>
<td>47</td>
</tr>
<tr>
<td>Bruegger’s Bagels</td>
<td>$204 million</td>
<td>284</td>
</tr>
<tr>
<td>Bubba Gump Shrimp Co.</td>
<td>$200 million</td>
<td>29</td>
</tr>
<tr>
<td>Freddy’s Frozen Custard &amp; Steakburgers</td>
<td>$200 million</td>
<td>135</td>
</tr>
<tr>
<td>The Melting Pot</td>
<td>$199 million</td>
<td>129</td>
</tr>
<tr>
<td>Fogo de Chao</td>
<td>$199 million</td>
<td>25</td>
</tr>
<tr>
<td>Baja Fresh Mexican Grill</td>
<td>$198 million</td>
<td>171</td>
</tr>
<tr>
<td>A&amp;W All American Food</td>
<td>$197 million</td>
<td>677</td>
</tr>
<tr>
<td>Bertucci’s Italian Restaurant</td>
<td>$191 million</td>
<td>88</td>
</tr>
<tr>
<td>Souplantation &amp; Sweet Tomatoes</td>
<td>$190 million</td>
<td>86</td>
</tr>
<tr>
<td>Zöes Kitchen</td>
<td>$180 million</td>
<td>132</td>
</tr>
<tr>
<td>Smokey Bones Bar &amp; Fire Grill</td>
<td>$177 million</td>
<td>65</td>
</tr>
<tr>
<td>Houston’s</td>
<td>$177 million</td>
<td>19</td>
</tr>
<tr>
<td>The Habit Burger Grill</td>
<td>$175 million</td>
<td>110</td>
</tr>
<tr>
<td>Donatos</td>
<td>$175 million</td>
<td>152</td>
</tr>
<tr>
<td>Claim Jumper</td>
<td>$171 million</td>
<td>42</td>
</tr>
<tr>
<td>Penn Station East Coast Subs</td>
<td>$169 million</td>
<td>287</td>
</tr>
<tr>
<td>J. Alexander’s</td>
<td>$167 million</td>
<td>31</td>
</tr>
<tr>
<td>Eat ‘n Park</td>
<td>$165 million</td>
<td>70</td>
</tr>
<tr>
<td>Cafe Rio Mexican Grill</td>
<td>$164 million</td>
<td>78</td>
</tr>
<tr>
<td>Quaker Steak &amp; Lube</td>
<td>$161 million</td>
<td>60</td>
</tr>
<tr>
<td>Shari’s Restaurants</td>
<td>$158 million</td>
<td>96</td>
</tr>
<tr>
<td>La Madeleine Country French Cafe</td>
<td>$154 million</td>
<td>75</td>
</tr>
<tr>
<td>El Torito</td>
<td>$154 million</td>
<td>61</td>
</tr>
<tr>
<td>Marie Callender’s Restaurant &amp; Bakery</td>
<td>$153 million</td>
<td>74</td>
</tr>
<tr>
<td>Black Bear Diner</td>
<td>$152 million</td>
<td>67</td>
</tr>
<tr>
<td>Bravo! Cucina Italiana</td>
<td>$151 million</td>
<td>49</td>
</tr>
<tr>
<td>Del Frisco’s Double Eagle Steak House</td>
<td>$151 million</td>
<td>11</td>
</tr>
<tr>
<td>Mastro’s Steakhouse/Ocean Club</td>
<td>$150 million</td>
<td>12</td>
</tr>
</tbody>
</table>
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)
44.1 Overview

In its annual assessment of the Top 200 restaurants chains, Nation’s Restaurant News categorizes restaurant segments as follows:

- Bakery-Cafe
- Beverage-Snack
- Buffet
- Burgers (Limited-Service)
- Cafeteria
- Casual-Dining
- Chicken (Limited-Service)
- Convenience Stores
- Family-Dining
- In-Store
- Mexican (Limited-Service)
- Pizza
- Sandwiches (Limited-Service)
- Other (Limited-Service)

44.2 Segment Assessment

The following are the largest restaurant chains by segment (source: Nation’s Restaurant News, June 2015):

**Bakery-Cafe**

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Systemwide Sales</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Panera Bread</td>
<td>$ 4.26 billion</td>
<td>1,759</td>
</tr>
<tr>
<td>Tim Hortons</td>
<td>$ 650 million</td>
<td>884</td>
</tr>
<tr>
<td>Einstein Bros. Bagels</td>
<td>$ 498 million</td>
<td>758</td>
</tr>
<tr>
<td>Corner Bakery Cafe</td>
<td>$ 355 million</td>
<td>184</td>
</tr>
<tr>
<td>Au Bon Pain</td>
<td>$ 354 million</td>
<td>210</td>
</tr>
<tr>
<td>Bruegger’s Bagels</td>
<td>$ 204 million</td>
<td>284</td>
</tr>
<tr>
<td>La Madeleine Country French Cafe</td>
<td>$ 154 million</td>
<td>75</td>
</tr>
</tbody>
</table>

**Beverage-Snack**

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Systemwide Sales</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starbucks Coffee</td>
<td>$13.01 billion</td>
<td>11,939</td>
</tr>
<tr>
<td>Dunkin’ Donuts</td>
<td>$ 7.17 billion</td>
<td>8,082</td>
</tr>
<tr>
<td>Restaurant</td>
<td>Revenue</td>
<td>Stores</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-----------</td>
<td>--------</td>
</tr>
<tr>
<td>Krispy Kreme Doughnuts:</td>
<td>$659 million</td>
<td>278</td>
</tr>
<tr>
<td>Baskin-Robbins:</td>
<td>$544 million</td>
<td>2,484</td>
</tr>
<tr>
<td>Jamba Juice:</td>
<td>$513 million</td>
<td>806</td>
</tr>
<tr>
<td>Auntie Anne's:</td>
<td>$492 million</td>
<td>1,171</td>
</tr>
<tr>
<td>Cold Stone Creamery:</td>
<td>$364 million</td>
<td>923</td>
</tr>
<tr>
<td>Caribou Coffee:</td>
<td>$286 million</td>
<td>398</td>
</tr>
<tr>
<td>Smoothie King:</td>
<td>$226 million</td>
<td>590</td>
</tr>
<tr>
<td>Peet's Coffee &amp; Tea:</td>
<td>$226 million</td>
<td>238</td>
</tr>
<tr>
<td>Tropical Smoothie Cafe:</td>
<td>$209 million</td>
<td>411</td>
</tr>
</tbody>
</table>

**Buffet**

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Revenue</th>
<th>Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td>HomeTown Buffet:</td>
<td>$259 million</td>
<td>108</td>
</tr>
<tr>
<td>Sizzler:</td>
<td>$235 million</td>
<td>127</td>
</tr>
<tr>
<td>Ryan’s Grill, Buffet &amp; Bakery:</td>
<td>$229 million</td>
<td>121</td>
</tr>
<tr>
<td>Old Country Buffet:</td>
<td>$214 million</td>
<td>89</td>
</tr>
<tr>
<td>Souplantation &amp; Sweet Tomatoes:</td>
<td>$190 million</td>
<td>86</td>
</tr>
</tbody>
</table>

**Burgers (Limited-Service)**

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Revenue</th>
<th>Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td>McDonald’s:</td>
<td>$35.44 billion</td>
<td>14,350</td>
</tr>
<tr>
<td>Burger King:</td>
<td>$8.63 billion</td>
<td>7,129</td>
</tr>
<tr>
<td>Wendy’s:</td>
<td>$8.56 billion</td>
<td>5,750</td>
</tr>
<tr>
<td>Sonic America’s Drive-In:</td>
<td>$4.03 billion</td>
<td>3,518</td>
</tr>
<tr>
<td>Dairy Queen:</td>
<td>$3.19 billion</td>
<td>4,446</td>
</tr>
<tr>
<td>Jack in the Box:</td>
<td>$3.17 billion</td>
<td>2,249</td>
</tr>
<tr>
<td>Hardee’s:</td>
<td>$2.05 billion</td>
<td>1,771</td>
</tr>
<tr>
<td>Whataburger:</td>
<td>$1.80 billion</td>
<td>774</td>
</tr>
<tr>
<td>Carl’s Jr.:</td>
<td>$1.52 billion</td>
<td>1,142</td>
</tr>
<tr>
<td>Five Guys Burgers and Fries:</td>
<td>$1.20 billion</td>
<td>1,163</td>
</tr>
<tr>
<td>Culver’s:</td>
<td>$1.03 billion</td>
<td>528</td>
</tr>
<tr>
<td>Steak ’n Shake:</td>
<td>$952 million</td>
<td>536</td>
</tr>
<tr>
<td>In-N-Out Burger:</td>
<td>$751 million</td>
<td>299</td>
</tr>
<tr>
<td>White Castle:</td>
<td>$528 million</td>
<td>391</td>
</tr>
<tr>
<td>Checkers:</td>
<td>$492 million</td>
<td>507</td>
</tr>
<tr>
<td>Krystal:</td>
<td>$408 million</td>
<td>354</td>
</tr>
<tr>
<td>Rally’s Hamburgers:</td>
<td>$264 million</td>
<td>295</td>
</tr>
<tr>
<td>Fuddruckers:</td>
<td>$261 million</td>
<td>173</td>
</tr>
<tr>
<td>Smashburger:</td>
<td>$256 million</td>
<td>288</td>
</tr>
<tr>
<td>Braum’s Ice Cream and Dairy Stores:</td>
<td>$243 million</td>
<td>279</td>
</tr>
<tr>
<td>Johnny Rockets:</td>
<td>$225 million</td>
<td>203</td>
</tr>
<tr>
<td>Freddy’s Frozen Custard &amp; Steakburgers:</td>
<td>$200 million</td>
<td>135</td>
</tr>
<tr>
<td>A&amp;W All American Food:</td>
<td>$197 million</td>
<td>677</td>
</tr>
<tr>
<td>The Habit Burger Grill:</td>
<td>$175 million</td>
<td>110</td>
</tr>
</tbody>
</table>
**Cafeteria**
- Luby's Cafeteria: $238 million

**Casual-Dining**
- Applebee's Neighborhood Grill & Bar: $4.57 billion
- Olive Garden: $3.76 billion
- Chili’s Grill & Bar: $3.63 billion
- Buffalo Wild Wings Grill & Bar: $3.23 billion
- Outback Steakhouse: $2.48 billion
- Red Lobster: $2.37 billion
- Texas Roadhouse: $1.87 billion
- The Cheesecake Factory: $1.78 billion
- TGI Fridays: $1.77 billion
- LongHorn Steakhouse: $1.54 billion
- Red Robin Gourmet Burgers & Brews: $1.43 billion
- Ruby Tuesday: $1.18 billion
- P.F. Chang’s China Bistro: $881 million
- BJ’s Restaurant & Brewhouse: $845 million
- Hooters: $837 million
- Carrabba’s Italian Grill: $714 million
- Logan’s Roadhouse: $711 million
- Cheddar’s: $668 million
- California Pizza Kitchen: $634 million
- Bonefish Grill: $622 million
- Ruth’s Chris Steak House: $559 million
- O’Charley’s: $521 million
- Famous Dave’s: $496 million
- Yard House: $478 million
- Joe’s Crab Shack: $433 million
- Maggiano’s Little Italy: $407 million
- The Capital Grille: $405 million
- On the Border Mexican Grill & Cantina: $360 million
- Dave & Buster’s: $354 million
- Romano’s Macaroni Grill: $340 million
- Miller’s Ale House: $317 million
- Benihana of Tokyo: $298 million
- Mimi’s Cafe: $289 million
- Ninety Nine Restaurant & Pub: $280 million
- Fleming’s Prime Steakhouse & Wine Bar: $275 million
- Uno Chicago Grill/Pizzeria Uno: $274 million
- Morton’s the Steakhouse: $264 million
- Bucati Beppo: $261 million
- Brio Tuscan Grille: $255 million
- Saltgrass Steak House: $247 million
<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Revenue</th>
<th>Market Cap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chuy’s</td>
<td>$245 million</td>
<td>59</td>
</tr>
<tr>
<td>Seasons 52</td>
<td>$239 million</td>
<td>43</td>
</tr>
<tr>
<td>Old Chicago</td>
<td>$235 million</td>
<td>97</td>
</tr>
<tr>
<td>Legal Sea Foods</td>
<td>$233 million</td>
<td>34</td>
</tr>
<tr>
<td>Twin Peaks</td>
<td>$226 million</td>
<td>63</td>
</tr>
<tr>
<td>McCormick &amp; Schmick’s</td>
<td>$217 million</td>
<td>57</td>
</tr>
<tr>
<td>Houlihan’s</td>
<td>$215 million</td>
<td>76</td>
</tr>
<tr>
<td>Carino’s Italian</td>
<td>$214 million</td>
<td>97</td>
</tr>
<tr>
<td>Bar Louie</td>
<td>$213 million</td>
<td>92</td>
</tr>
<tr>
<td>Beef ‘O’ Brady’s Family Sports Pub</td>
<td>$212 million</td>
<td>200</td>
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<td>Bahama Breeze</td>
<td>$210 million</td>
<td>37</td>
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<tr>
<td>Rainforest Cafe</td>
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<td>23</td>
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<td>Hard Rock Cafe</td>
<td>$205 million</td>
<td>47</td>
</tr>
<tr>
<td>Bubba Gump Shrimp Co.</td>
<td>$200 million</td>
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<td>The Melting Pot</td>
<td>$199 million</td>
<td>129</td>
</tr>
<tr>
<td>Fogo de Chao</td>
<td>$199 million</td>
<td>25</td>
</tr>
<tr>
<td>Bertucci’s Italian Restaurant</td>
<td>$191 million</td>
<td>88</td>
</tr>
<tr>
<td>Smokey Bones Bar &amp; Fire Grill</td>
<td>$177 million</td>
<td>65</td>
</tr>
<tr>
<td>Houston’s</td>
<td>$177 million</td>
<td>19</td>
</tr>
<tr>
<td>Claim Jumper</td>
<td>$171 million</td>
<td>42</td>
</tr>
<tr>
<td>J. Alexander’s</td>
<td>$167 million</td>
<td>31</td>
</tr>
<tr>
<td>Quaker Steak &amp; Lube</td>
<td>$161 million</td>
<td>60</td>
</tr>
<tr>
<td>El Torito</td>
<td>$154 million</td>
<td>61</td>
</tr>
<tr>
<td>Marie Callender’s Restaurant &amp; Bakery</td>
<td>$153 million</td>
<td>74</td>
</tr>
<tr>
<td>Bravo! Cucina Italiana</td>
<td>$151 million</td>
<td>49</td>
</tr>
<tr>
<td>Del Frisco’s Double Eagle Steak House</td>
<td>$151 million</td>
<td>11</td>
</tr>
<tr>
<td>Mastro's Steakhouse/Ocean Club</td>
<td>$150 million</td>
<td>12</td>
</tr>
</tbody>
</table>

### Chicken (Limited-Service)

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Revenue</th>
<th>Market Cap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chick-fil-A</td>
<td>$5.71 billion</td>
<td>1,871</td>
</tr>
<tr>
<td>KFC</td>
<td>$4.20 billion</td>
<td>4,370</td>
</tr>
<tr>
<td>Popeyes Louisiana Kitchen</td>
<td>$2.41 billion</td>
<td>1,870</td>
</tr>
<tr>
<td>Zaxby’s</td>
<td>$1.25 billion</td>
<td>658</td>
</tr>
<tr>
<td>Bojangles’ Famous Chicken ‘n Biscuits</td>
<td>$1.03 billion</td>
<td>622</td>
</tr>
<tr>
<td>Church’s Chicken</td>
<td>$861 million</td>
<td>1,168</td>
</tr>
<tr>
<td>El Pollo Loco</td>
<td>$723 million</td>
<td>415</td>
</tr>
<tr>
<td>Wingstop</td>
<td>$664 million</td>
<td>671</td>
</tr>
<tr>
<td>Boston Market</td>
<td>$602 million</td>
<td>456</td>
</tr>
<tr>
<td>Raising Cane’s Fingers</td>
<td>$415 million</td>
<td>208</td>
</tr>
<tr>
<td>Pollo Tropical</td>
<td>$308 million</td>
<td>129</td>
</tr>
</tbody>
</table>

### Convenience Stores

<table>
<thead>
<tr>
<th>Store</th>
<th>Revenue</th>
<th>Market Cap</th>
</tr>
</thead>
<tbody>
<tr>
<td>7-Eleven</td>
<td>$2.11 billion</td>
<td>7,309</td>
</tr>
<tr>
<td>Wawa</td>
<td>$1.22 billion</td>
<td>678</td>
</tr>
</tbody>
</table>
• Circle K: $ 787 million 3,908
• Casey's General Stores: $ 776 million 1,860
• Sheetz: $ 588 million 478
• Stripes: $ 271 million 604

**Family-Dining**
• IHOP: $ 2.93 billion 1,579
• Denny's: $ 2.53 billion 1,596
• Cracker Barrel Old Country Store: $ 2.13 billion 633
• Golden Corral: $ 1.73 billion 500
• Waffle House: $ 1.11 billion 1,840
• Bob Evans Restaurants: $ 959 million 566
• Perkins Restaurant & Bakery: $ 629 million 391
• Big Boy/Frisch's Big Boy: $ 388 million 225
• Friendly's: $ 384 million 280
• Village Inn: $ 347 million 210
• Shoney's: $ 259 million 163
• Sonny's Real Pit Bar-B-Q: $ 258 million 119
• Huddle House: $ 241 million 370
• Eat 'n Park: $ 165 million 70
• Shari's Restaurants: $ 158 million 96
• Black Bear Diner: $ 152 million 67

**In-Store**
• Costco: $ 670 million 455
• Target Cafe (Target stores): $ 503 million 1,774
• Sam's Cafe (Walmart stores): $ 293 million 636
• Barnes & Noble Cafe: $ 287 million 647

**Mexican (Limited-Service)**
• Taco Bell: $ 8.20 billion 5,921
• Chipotle Mexican Grill: $ 4.06 billion 1,775
• Qdoba Mexican Grill: $ 667 million 634
• Del Taco: $ 655 million 546
• Moe's Southwest Grill: $ 571 million 581
• Taco John's: $ 347 million 393
• Taco Cabana: $ 314 million 174
• Rubio's Fresh Mexican Grill: $ 211 million 193
• Taco Bueno: $ 208 million 174
• Baja Fresh Mexican Grill: $ 198 million 171
• Cafe Rio Mexican Grill: $ 164 million 78

**Pizza**
• Pizza Hut: $ 5.50 billion 7,863

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2016-2017
• 245 •
• Domino’s: $4.11 billion  5,067
• Little Caesars: $3.40 billion  4,083
• Papa John’s Pizza: $2.68 billion  3,250
• Papa Murphy’s Take ‘N’ Bake Pizza: $841 million  1,433
• CiCi’s Pizza: $441 million  452
• Round Table Pizza: $399 million  437
• Chuck E. Cheese’s: $368 million  545
• Marco’s Pizza: $337 million  578
• Hungry Howie’s Pizza: $327 million  551
• Godfather’s Pizza: $242 million  571
• Pizza Ranch: $211 million  188
• Donatos: $175 million  152

Sandwiches (Limited-Service)
• Subway: $12.26 billion  26,530
• Arby’s: $3.17 billion  3,226
• Jimmy John’s Gourmet Sandwiches: $1.75 billion  2,109
• Jason’s Deli: $617 million  253
• Firehouse Subs: $544 million  840
• Jersey Mike’s Subs: $525 million  857
• McAlister’s Deli: $505 million  337
• Quiznos: $342 million  985
• Potbelly Sandwich Works: $339 million  351
• Portillo’s: $317 million  38
• Schlotzsky’s: $300 million  347
• Charley’s Grilled Subs: $281 million  445
• Penn Station East Coast Subs: $169 million  287

Other (Limited-Service)
• Panda Express: $2.24 billion  1,708
• Long John Silver’s: $555 million  815
• Captain D’s Seafood Kitchen: $499 million  511
• Noodles & Company: $465 million  439
• Dickey’s Barbecue Pit: $355 million  515
• Pei Wei Asian Diner: $343 million  201
• Sbarro, the Italian Eatery: $279 million  353
• Wienerschnitzel: $232 million  322
• Sarku Japan: $223 million  231
• Fazoli’s: $219 million  212
• Zöes Kitchen: $180 million  132
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)
45

TOP GROWTH CHAINS

45.1 Systemwide Sales Growth

According to Nation’s Restaurant News (June 2015), the following chains reported the highest systemwide sales growth at the end of their most recent fiscal year:

• The Habit Burger Grill: 45.93%
• Marco’s Pizza: 41.30%
• Zöes Kitchen: 40.70%
• Freddy’s Frozen Custard & Steakburgers: 38.44%
• Twin Peaks: 37.21%
• Dickey’s Barbecue Pit: 36.91%
• Jersey Mike’s Subs: 29.31%
• Chipotle Mexican Grill: 27.25%
• Firehouse Subs: 24.83%
• Raising Cane’s Chicken Fingers: 23.51%
• Tropical Smoothie Cafe: 23.22%
• Wingstop: 22.92%
• Fogo de Chao: 22.60%
• Seasons 52: 22.19%
• Yard House: 21.01%
• Peet’s Coffee & Tea: 20.05%
• Chuy’s: 19.91%
• Jimmy John’s Gourmet Sandwiches: 19.77%
• Cafe Rio Mexican Grill: 19.71%
• Smashburger: 19.41%
• Pollo Tropical: 18.29%
• Casey’s General Stores: 17.73%
• Smoothie King: 17.70%
• Zaxby’s: 17.16%
• Buffalo Wild Wings Grill & Bar: 16.31%
• Dave & Buster’s: 16.14%
• Charley’s Grilled Subs/Charleys Philly Steaks: 14.97%
• Moe’s Southwest Grill: 14.67%
• Bar Louie: 14.62%
• Chick-fil-A: 14.48%
• Culver’s: 14.37%
• Donatos Pizza: 13.93%
• Noodles & Company: 13.72%
• Whataburger: 13.39%
• Saltgrass Steak House: 13.28%
• Black Bear Diner: 13.04%
• Panda Express: 12.89%
• Qdoba Mexican Grill: 12.78%
• Bojangles’ Famous Chicken ‘n Biscuits: 11.95%
• LongHorn Steakhouse: 11.85%
• Popeyes Louisiana Kitchen: 11.84%
• Stripes: 11.83%
• Potbelly Sandwich Works: 11.00%
• Sheetz: 10.98%
• Pizza Ranch: 10.47%
• Mastro’s Steakhouse/Ocean Club: 10.34%
• Hungry Howie’s Pizza: 10.32%
• Tim Hortons: 10.24%
• Auntie Anne’s: 10.18%
• Corner Bakery Cafe: 10.16%
• McAlister’s Deli: 10.02%

45.2 Market Resources
Nation’s Restaurant News, 1166 Avenue of the Americas, 10th Floor, New York, NY 10036. (212) 204-4200. (www.nrn.com)
TOP FOODSERVICE DISTRIBUTORS

46.1 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.)

46.2 Consolidation

In 2014, an $8.2 billion merger of Sysco Corp. and US Foods, the two largest foodservice distributors, was announced.

Reinhart Foodservice recently acquired Agar Supply Co. Inc. PFGC recently acquired Institution Food House (IFH).

46.3 Market Resources

Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)
TOP RESTAURANT FRANCHISEES

47.1 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 2015:

<table>
<thead>
<tr>
<th>Company</th>
<th>Units</th>
<th>Brands</th>
</tr>
</thead>
<tbody>
<tr>
<td>NPC International:</td>
<td>1,390</td>
<td>Pizza Hut, Wendy’s</td>
</tr>
<tr>
<td>Target Corp:</td>
<td>1,183</td>
<td>Cold Stone Creamery, Pizza Hut, Jamba Juice</td>
</tr>
<tr>
<td>Carrols Restaurant Group:</td>
<td>650</td>
<td>Burger King</td>
</tr>
<tr>
<td>Flynn Restaurant Group:</td>
<td>640</td>
<td>Applebee’s, Taco Bell</td>
</tr>
<tr>
<td>Dhanani Group/Houston Foods:</td>
<td>540</td>
<td>Burger King, Popeyes Louisiana Kitchen</td>
</tr>
<tr>
<td>Aramark:</td>
<td>532</td>
<td>Ben &amp; Jerry’s Scoop Shop, Chick-fil-A, Chili’s, Cosi, Denny’s, Dunkin’ Donuts, Einstein Bros. Bagels, Erbert &amp; Gerbert’s, the Extreme Pita, IHOP, Jack in the Box, KFC, Mcalister’s Deli, Moe’s Southwest Grill, Noble Roman’s, Papa John’s Pizza, Pinkberry, Pizza Hut, Qdoba Mexican Grill, Quiznos, Raising Cane’s Chicken Fingers, Sbarro, Seattle’s Best Coffee, Subway, Taco Bell, Tim Hortons, Togo’s, Villa Pizza, Wendy’s, Jamba Juice, Which Wich, Quaker Steak &amp; Lube, Freshii, Mooyah Burgers &amp; Fries, Panda Express, Salad Creations</td>
</tr>
<tr>
<td>Army &amp; Air Force Exchange Services:</td>
<td>473</td>
<td>Arby’s, Blimpie, Burger King, Church’s Chicken, Cinnabon, Domino’s Pizza, Einstein Bros. Bagels, Godfather’s Pizza, Pizza Hut, Popeyes Louisiana Kitchen, Subway, Taco Bell, Taco John’s, Wing Zone, Charley’s Grilled Subs</td>
</tr>
</tbody>
</table>

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2016-2017
• 251 •
<table>
<thead>
<tr>
<th>Company</th>
<th>Location</th>
<th>Restaurants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun Holdings</td>
<td>453</td>
<td>Burger King, Popeyes Louisiana Kitchen, Krispy Kreme, Cici's, Arby's, T-mobile, Golden Corral</td>
</tr>
<tr>
<td>HMHost Corp</td>
<td>393</td>
<td>Baja Fresh, Blimpie, Burger King, Chick-fil-A, Chili's, Cinnabon, Cold Stone Creamery, Dunkin' Donuts, Einstein Bros. Bagels, Godfather's Pizza, the Great American Bagel, Great Steak &amp; Potato Company, Johnny Rockets, Kelly's Cajun Grill, KFC, La Salsa, Moe's Southwest Grill, Nathan's Famous, Pinkberry, Pizza Hut, Popeyes Louisiana Kitchen, Quiznos, Ranch One, Romano's Macaroni Grill, Roy Rogers, Ruby's Diner, Salsarita's, Sbarro, Steak 'N Shake, Subway, Villa Pizza, Yeung's Lotus Express, Jamba Juice, Smashburger, Famous Famiglia, Sonny Bryan's Salad Creations, Smokehouse, Max &amp; Erma's</td>
</tr>
<tr>
<td>Tacala</td>
<td>384</td>
<td>Pizza Hut, Sonic Drive-in, Taco Bell</td>
</tr>
<tr>
<td>Rottinghaus Company</td>
<td>382</td>
<td>Subway</td>
</tr>
<tr>
<td>Sodexo</td>
<td>378</td>
<td>Baja Fresh, Blimpie, Burger King, Carl's Jr., Chester's, Chick-fil-A, Einstein Bros. Bagels, Godfather's Pizza, KFC, Mcalister's Deli, Moe's Southwest Grill, Papa John's Pizza, Pizza Hut, Quiznos, Seattle's Best Coffee, Subway, Taco Bell, Tim Hortons, Wow Cafe &amp; Wingery, Jamba Juice, Pj's Coffee of New Orleans, Nrgize Lifestyle Cafe, Quaker Steak &amp; Lube, Erbert &amp; Gerbert's, Planet Sub</td>
</tr>
<tr>
<td>Pilot Travel Centers</td>
<td>369</td>
<td>Arby's, Carvel, Cinnabon, Huddle House, KFC, Moe's Southwest Grill, Pizza Hut, Subway, Taco Bell, Wendy's, Dairy Queen</td>
</tr>
<tr>
<td>Muy Brands</td>
<td>365</td>
<td>Pizza Hut, Taco Bell, Wendy's</td>
</tr>
<tr>
<td>Manna Inc.</td>
<td>361</td>
<td>Wendy's, Chili's, Fazoli's, Perkins Restaurant &amp; Bakery</td>
</tr>
<tr>
<td>Boddie-Noell Enterprises</td>
<td>330</td>
<td>Hardee's</td>
</tr>
</tbody>
</table>
• United States Beef Corp: 327 Arby’s, Taco Bueno
• Harman Management Corp: 307 A&W, KFC, Long John Silver’s, Taco Bell, Pizza Hut
• ADF Companies: 303 Pizza Hut
• Apex Restaurant Management: 300 KFC, Long John Silver’s, Taco Bell
• Loves Travel Stops: 300 Arby’s, Godfather’s Pizza, Subway
• Strategic Restaurants Acq. Co.: 291 Burger King
• Wilcoehess: 280 Arby’s, Dunkin’ Donuts, Godfather’s Pizza, Subway, Wendy’s
• KBPBP Foods: 276 KFC, Taco Bell, Long John Silver’s
• K-MAC Enterprises: 276 KFC, Taco Bell
• Mason-Harrison-Ratliff Enterprises: 267 Sonic Drive-in
• Richard Lawlor: 263 Dunkin’ Donuts
• Southern California Pizza: 262 Pizza Hut
• The Covelli Family Ltd.: 260 Panera Bread
• JIB Management: 255 Jack in the Box
• Hess Corp: 251 Burger King, Godfather’s Pizza, Quiznos:
• Fugate Enterprises: 245 Pizza Hut, Taco Bell
• Quality Dining: 214 Burger King, Chili’s
• D L Rogers Corp: 210 Sonic Drive-in
• The Pantry: 210 Chester’s, Church’s Chicken, Little Caesars Pizza, Quiznos, Subway, Dairy Queen
• Marlu Investment Group: 205 Arby’s, Church’s Chicken, TGI Fridays, Jack in the Box, Little Caesars Pizza, Sizzler, Captain D’s, Sears Outlets & Appliance Stores
• TA Operating: 201 Burger King, Knights Inn, Pizza Hut, Popeyes Louisiana Kitchen, Subway, Taco Bell, Tim Hortons
• Servus!: 183 Denny’s, Long John Silver’s, Wendy’s, Grandy’s, Papa John’s Pizza
• Charter Foods: 177 A&W, Long John Silver’s, Taco Bell
• JRN: 177 KFC, Pizza Hut
• Sizzling Platter: 176 Little Caesars Pizza, Sizzler
• Kmart: 175 Little Caesars Pizza
• Cedar Enterprises: 170 Burger King, Wendy’s
• Compass Group USA: 156 Bojangles’, Burger King, Einstein Bros. Bagels, Jerry’s Subs & Pizza, Johnny Rockets, Moe’s Southwest Grill, Papa John’s Pizza, Pinkberry, Pizza Hut, Quiznos, Rollerz,
<table>
<thead>
<tr>
<th>Company</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pacpizza</td>
<td>156</td>
</tr>
<tr>
<td>Desert De Oro Foods</td>
<td>155</td>
</tr>
<tr>
<td>Restaurant Mgt. Co. of Wichita</td>
<td>155</td>
</tr>
<tr>
<td>B &amp; B Consultants</td>
<td>153</td>
</tr>
<tr>
<td>Fourteen Foods</td>
<td>153</td>
</tr>
<tr>
<td>Davco Restaurants</td>
<td>153</td>
</tr>
<tr>
<td>PJ United</td>
<td>152</td>
</tr>
<tr>
<td>Interfoods of America</td>
<td>140</td>
</tr>
<tr>
<td>Chalak Mitra Group</td>
<td>140</td>
</tr>
<tr>
<td>Celebration Restaurant Group</td>
<td>139</td>
</tr>
<tr>
<td>Valenti Management</td>
<td>139</td>
</tr>
<tr>
<td>RMH Franchise Corp</td>
<td>137</td>
</tr>
<tr>
<td>RPM Pizza</td>
<td>135</td>
</tr>
<tr>
<td>Doherty Enterprises</td>
<td>134</td>
</tr>
<tr>
<td>Apple Gold</td>
<td>132</td>
</tr>
<tr>
<td>Summit Restaurant Group</td>
<td>131</td>
</tr>
<tr>
<td>America’s Pizza Co.</td>
<td>128</td>
</tr>
<tr>
<td>Cafua Management Company</td>
<td>128</td>
</tr>
<tr>
<td>Las Vegas Pizza</td>
<td>127</td>
</tr>
<tr>
<td>Palo Alto</td>
<td>124</td>
</tr>
<tr>
<td>Rage</td>
<td>123</td>
</tr>
<tr>
<td>Marchelle Stewart</td>
<td>123</td>
</tr>
<tr>
<td>Wisconsin Hospitality Group</td>
<td>121</td>
</tr>
<tr>
<td>Bajco</td>
<td>121</td>
</tr>
<tr>
<td>JEM Restaurant Group</td>
<td>119</td>
</tr>
<tr>
<td>The Scrivanos Group</td>
<td>118</td>
</tr>
<tr>
<td>South American Restaurants Corp.</td>
<td>117</td>
</tr>
<tr>
<td>Neighborhood Restau. Partners</td>
<td>115</td>
</tr>
<tr>
<td>Briad Restaurant Group</td>
<td>114</td>
</tr>
<tr>
<td>Dipasqua Enterprises</td>
<td>114</td>
</tr>
<tr>
<td>Western Reserve Restaurant Mgt.</td>
<td>113</td>
</tr>
<tr>
<td>Randolph S Katz</td>
<td>111</td>
</tr>
<tr>
<td>Daland Corp</td>
<td>110</td>
</tr>
<tr>
<td>Goldco</td>
<td>109</td>
</tr>
<tr>
<td>Pepper Dining</td>
<td>104</td>
</tr>
<tr>
<td>Magic Burgers</td>
<td>103</td>
</tr>
<tr>
<td>Brij Agrawal</td>
<td>102</td>
</tr>
</tbody>
</table>

Subway, Taco Bell, Wendy’s, Jamba Juice, Uno Due Go

Pizza Hut
Pizza Hut, Taco Bell, KFC, Long John Silver’s
Long John Silver’s, Pizza Hut
Sonic Drive-in
DQ Grill & Chill, Dairy Queen Braziers
Wendy’s
Papa John’s Pizza
Pizza Hut, Taco Bell
Chili’s, Wendy’s
Applebee’s
Domino’s Pizza
Applebee’s, Panera Bread
Applebee’s
A&W, Wingstreet, Pizza Hut, Long John Silver’s
Pizza Hut
Dunkin’ Donuts, Dunkin’ Donuts/Baskin-Robbins:
Pizza Hut
KFC, Pizza Hut, Taco Bell
Pizza Hut
KFC
Papa John’s Pizza
Pizza Hut, Taco Bell
Dunkin’ Donuts, Dunkin’

Church’s Chicken
Applebee’s
TGI Fridays, Wendy’s
Subway
Wendy’s
Midas
Pizza Hut
Burger King
Chili’s
Burger King
Subway
<table>
<thead>
<tr>
<th>Company</th>
<th>Year</th>
<th>Brands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northeast Foods</td>
<td>101</td>
<td>Burger King</td>
</tr>
<tr>
<td>Paradigm Investment Group</td>
<td>98</td>
<td>Hardee’s</td>
</tr>
<tr>
<td>Luihn Food System</td>
<td>97</td>
<td>KFC, Taco Bell, Long John Silver’s, Hurricane Grill &amp; Wings</td>
</tr>
<tr>
<td>Tanweer Ahmed</td>
<td>97</td>
<td>KFC, Taco Bell</td>
</tr>
<tr>
<td>Boom</td>
<td>97</td>
<td>Sonic Drive-in</td>
</tr>
<tr>
<td>A3H Foods LP</td>
<td>95</td>
<td>Jack in the Box</td>
</tr>
<tr>
<td>Houston Foods</td>
<td>95</td>
<td>Burger King</td>
</tr>
<tr>
<td>William B. Graves</td>
<td>95</td>
<td>Domino’s Pizza</td>
</tr>
<tr>
<td>Burgerbusters</td>
<td>94</td>
<td>Pizza Hut, Taco Bell</td>
</tr>
<tr>
<td>John Boike</td>
<td>94</td>
<td>Subway</td>
</tr>
</tbody>
</table>

### 47.2 Market Resources
Franchise Update Media Group, P.O. Box 20547, San Jose, CA 95160.  
(408) 402-5681.  [www.franchising.com]
48

TOP FRANCHISERS

48.1 Overview

According to Nation’s Restaurant News (June 2015), 139 of the Top 200 chain restaurants offer franchises. Combined, these chains have 155,136 franchised units. This represents 73% of the units operated by the Top 200 chains. Sixty-one (61) of the Top 200 chains do not offer franchises.

48.2 Franchised Units

The number of franchised units and percentage of total units that are franchised for the Top 200 chains are as follows:

<table>
<thead>
<tr>
<th>Franchised Units</th>
<th>Pct. of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subway: 26,530</td>
<td>100%</td>
</tr>
<tr>
<td>McDonald’s: 12,836</td>
<td>89%</td>
</tr>
<tr>
<td>Dunkin’ Donuts: 8,047</td>
<td>99%</td>
</tr>
<tr>
<td>Pizza Hut: 7,337</td>
<td>93%</td>
</tr>
<tr>
<td>Burger King: 7,077</td>
<td>99%</td>
</tr>
<tr>
<td>7-Eleven: 6,390</td>
<td>87%</td>
</tr>
<tr>
<td>Taco Bell: 4,995</td>
<td>84%</td>
</tr>
<tr>
<td>Wendy’s: 4,895</td>
<td>85%</td>
</tr>
<tr>
<td>Domino’s: 4,690</td>
<td>93%</td>
</tr>
<tr>
<td>Starbucks Coffee: 4,659</td>
<td>39%</td>
</tr>
<tr>
<td>Dairy Queen: 4,444</td>
<td>99%</td>
</tr>
<tr>
<td>KFC: 4,164</td>
<td>95%</td>
</tr>
<tr>
<td>Little Caesars Pizza: 3,528</td>
<td>86%</td>
</tr>
<tr>
<td>Sonic America’s Drive-In: 3,127</td>
<td>89%</td>
</tr>
<tr>
<td>Papa John’s Pizza: 2,564</td>
<td>79%</td>
</tr>
<tr>
<td>Baskin-Robbins: 2,478</td>
<td>99%</td>
</tr>
<tr>
<td>Arby’s: 2,286</td>
<td>71%</td>
</tr>
<tr>
<td>Jimmy John’s Gourmet Sandwiches: 2,071</td>
<td>98%</td>
</tr>
<tr>
<td>Chick-fil-A: 1,871</td>
<td>100%</td>
</tr>
<tr>
<td>Applebee’s Neighborhood Grill &amp; Bar: 1,847</td>
<td>99%</td>
</tr>
<tr>
<td>Jack in the Box: 1,818</td>
<td>80%</td>
</tr>
<tr>
<td>Popeyes Louisiana Kitchen: 1,805</td>
<td>96%</td>
</tr>
<tr>
<td>IHOP: 1,568</td>
<td>99%</td>
</tr>
<tr>
<td>Denny’s: 1,435</td>
<td>90%</td>
</tr>
<tr>
<td>Restaurant</td>
<td>Sales (in millions)</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Hardee’s:</td>
<td>1,370</td>
</tr>
<tr>
<td>Papa Murphy’s Take ‘N’ Bake Pizza:</td>
<td>1,342</td>
</tr>
<tr>
<td>Auntie Anne’s:</td>
<td>1,154</td>
</tr>
<tr>
<td>Quiznos:</td>
<td>978</td>
</tr>
<tr>
<td>Cold Stone Creamery:</td>
<td>912</td>
</tr>
<tr>
<td>Church’s Chicken:</td>
<td>907</td>
</tr>
<tr>
<td>Tim Hortons:</td>
<td>881</td>
</tr>
<tr>
<td>Jersey Mike’s Subs:</td>
<td>823</td>
</tr>
<tr>
<td>Long John Silver’s:</td>
<td>815</td>
</tr>
<tr>
<td>Firehouse Subs:</td>
<td>808</td>
</tr>
<tr>
<td>Five Guys Burgers and Fries:</td>
<td>785</td>
</tr>
<tr>
<td>Carl’s Jr.:</td>
<td>758</td>
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<tr>
<td>Waffle House:</td>
<td>750</td>
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<tr>
<td>Circle K:</td>
<td>706</td>
</tr>
<tr>
<td>A&amp;W All American Food:</td>
<td>674</td>
</tr>
<tr>
<td>Wingstop:</td>
<td>652</td>
</tr>
<tr>
<td>Buffalo Wild Wings Grill &amp; Bar:</td>
<td>579</td>
</tr>
<tr>
<td>Marco’s Pizza:</td>
<td>578</td>
</tr>
<tr>
<td>Moe’s Southwest Grill:</td>
<td>577</td>
</tr>
<tr>
<td>Smoothie King:</td>
<td>568</td>
</tr>
<tr>
<td>Godfather’s Pizza:</td>
<td>553</td>
</tr>
<tr>
<td>Zaxby’s:</td>
<td>546</td>
</tr>
<tr>
<td>Jamba Juice:</td>
<td>543</td>
</tr>
<tr>
<td>Hungry Howie’s Pizza:</td>
<td>533</td>
</tr>
<tr>
<td>Culver’s:</td>
<td>521</td>
</tr>
<tr>
<td>Dickey’s Barbecue Pit:</td>
<td>506</td>
</tr>
<tr>
<td>Chili’s Grill &amp; Bar:</td>
<td>435</td>
</tr>
<tr>
<td>CiCi’s Pizza:</td>
<td>433</td>
</tr>
<tr>
<td>Tropical Smoothie Cafe:</td>
<td>410</td>
</tr>
<tr>
<td>Charley’s Grilled Subs/Charleys Philly Steaks:</td>
<td>398</td>
</tr>
<tr>
<td>Golden Corral:</td>
<td>392</td>
</tr>
<tr>
<td>Taco John’s:</td>
<td>383</td>
</tr>
<tr>
<td>Round Table Pizza:</td>
<td>369</td>
</tr>
<tr>
<td>Bojangles’ Famous Chicken ‘n Biscuits:</td>
<td>368</td>
</tr>
<tr>
<td>Einstein Bros. Bagels:</td>
<td>360</td>
</tr>
<tr>
<td>Huddle House:</td>
<td>359</td>
</tr>
<tr>
<td>Qdoba Mexican Grill:</td>
<td>324</td>
</tr>
<tr>
<td>Wienerschnitzel:</td>
<td>322</td>
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<tr>
<td>Checkers:</td>
<td>321</td>
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<tr>
<td>Schlotzsky’s:</td>
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<td>TGI Fridays:</td>
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<tr>
<td>McAlister’s Deli:</td>
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<tr>
<td>Penn Station East Coast Subs:</td>
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<td>Perkins Restaurant &amp; Bakery:</td>
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<td>Restaurant</td>
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<td>------------------------------------------------</td>
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<tr>
<td>El Pollo Loco</td>
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<tr>
<td>Del Taco</td>
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<td>Captain D’s Seafood Kitchen</td>
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<tr>
<td>Beef ‘O’ Brady’s Family Sports Pub</td>
<td>191</td>
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<tr>
<td>Pizza Ranch</td>
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<tr>
<td>Johnny Rockets</td>
<td>175</td>
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<tr>
<td>Krispy Kreme Doughnuts</td>
<td>167</td>
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<tr>
<td>Baja Fresh Mexican Grill</td>
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<tr>
<td>Hooters</td>
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<tr>
<td>Sbarro, the Italian Eatery</td>
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<tr>
<td>Rally’s Hamburgers</td>
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<td>Famous Dave’s</td>
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<td>Krystal</td>
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<td>The Melting Pot</td>
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<td>Steak ‘n Shake</td>
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<td>Freddy’s Frozen Custard &amp; Steakburgers</td>
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<td>Whataburger</td>
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<td>Sizzler</td>
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<td>Sonny’s Real Pit Bar-B-Q</td>
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<td>Jason’s Deli</td>
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<tr>
<td>Big Boy/Frisch’s Big Boy</td>
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<td>Outback Steakhouse</td>
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<td>Shoney’s</td>
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<td>Fuddruckers</td>
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<td>Donatos Pizza</td>
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<td>Red Robin Gourmet Burgers &amp; Brews</td>
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<td>Panda Express</td>
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<td>Au Bon Pain</td>
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<td>Corner Bakery Cafe</td>
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<td>Texas Roadhouse</td>
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<td>Sarku Japan</td>
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<td>Cheddar’s</td>
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<td>Black Bear Diner</td>
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<td>Ruth’s Chris Steak House</td>
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<td>Carino’s Italian</td>
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<td>Noodles &amp; Company</td>
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<td>Raising Cane’s Chicken Fingers</td>
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<td>Houlihan’s</td>
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<tr>
<td>---------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>259</td>
<td></td>
</tr>
</tbody>
</table>

- Quaker Steak & Lube: 44 73%
- Uno Chicago Grill/Pizzeria Uno: 44 34%
- Twin Peaks: 39 68%
- Old Chicago: 38 39%
- Ruby Tuesday: 36 5%
- Chuck E. Cheese’s: 32 59%
- Marie Callender’s Restaurant & Bakery: 31 42%
- Logan’s Roadhouse: 26 10%
- Bar Louie: 20 22%
- On the Border Mexican Grill & Cantina: 20 14%
- Taco Bueno: 19 11%
- California Pizza Kitchen: 17 8%
- Potbelly Sandwich Works: 17 5%
- La Madeleine Country French Cafe: 11 15%
- Benihana of Tokyo: 9 12%
- Pei Wei Asian Diner: 8 4%
- O’Charley’s: 7 3%
- Taco Cabana: 7 4%
- Bonefish Grill: 5 2%
- Pollo Tropical: 5 4%
- Romano’s Macaroni Grill: 5 3%
- Rubio’s Fresh Mexican Grill: 4 2%
- Hard Rock Cafe: 3 4%
- Boston Market: 3 1%
- Zöes Kitchen: 3 2%
- P.F. Chang’s China Bistro: 2 1%

### 48.3 Non-Franchising Chains

The following restaurant chains do not offer franchises:

- Bahama Breeze
- Barnes & Noble Cafe
- Bertucci’s Italian Restaurant
- BJ’s Restaurant & Brewhouse
- Bob Evans Restaurants
- Braum’s Ice Cream and Dairy Stores
- Bravo! Cucina Italiana
- Brio Tuscan Grille
- Bubba Gump Shrimp Co.
- Buca di Beppo
- Cafe Rio Mexican Grill
- Carrabba’s Italian Grill
- Casey’s General Stores
- Chipotle Mexican Grill
- Chuy’s
- Claim Jumper
- Costco
- Cracker Barrel Old Country Store
- Dave & Buster’s
- Eat’n Park
- El Torito
- Fogo de Chao
- Frisco’s Double Eagle Steak House
- Hard Rock Cafe
- HomeTown Buffet
- Houston’s
- In-N-Out Burger
- J. Alexander’s

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• Joe’s Crab Shack
• Legal Sea Foods
• LongHorn Steakhouse
• Luby’s Cafeteria
• Maggiano’s Little Italy
• Mastro’s Steakhouse/Ocean Club
• McCormick & Schmick’s
• Miller’s Ale House
• Mimi’s Cafe
• Morton’s the Steakhouse
• Ninety Nine Restaurant & Pub
• Old Country Buffet
• Olive Garden
• Peet’s Coffee & Tea
• Portillo’s
• Rainforest Cafe
• Red Lobster
• Ryan’s Grill, Buffet & Bakery
• Saltgrass Steak House
• Sam’s Cafe (Walmart stores)
• Seasons 52
• Shari’s Restaurants
• Sheetz
• Smokey Bones Bar & Fire Grill
• Stripes
• Sweet Tomatoes
• Target Cafe (Target stores)
• The Capital Grille
• The Cheesecake Factory
• The Habit Burger Grill
• Wawa
• White Castle
• Yard House

48.4 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

49.1 Rank By Annual Gross Revenue

According to Restaurant Business (October 2015), the following independent restaurants have the highest annual gross revenue:

- Tao Asian Bistro (Las Vegas, NV): $47.00 million
- Tao Downtown (New York, NY): $38.00 million
- Joe’s Stone Crab (Miami Beach, FL): $36.13 million
- Lavo (New York, NY): $31.00 million
- Carmine’s (New York, NY): $30.98 million
- Old Ebbitt Grill (Washington, DC): $28.05 million
- Smith & Wollensky (New York, NY): $26.05 million
- Tao Uptown (New York, NY): $24.00 million
- Prime 112 (Miami Beach, FL): $23.50 million
- Gibson Bar & Steakhouse (Chicago IL): $22.53 million
- Joe’s Seafood, Prime Steak & Stone Crab (Chicago, IL): $21.80 million
- Buddakan (New York, NY): $21.42 million
- Fulton’s Crab House (Lake Buena Vista, FL): $21.20 million
- Bottega Louie (Los Angeles, CA): $21.12 million
- Joe’s Seafood, Prime Steak & Stone Crab (Las Vegas, NV): $20.90 million
- Joe’s Seafood, Prime Steak & Stone Crab (Washington, DC): $20.50 million
- Carnevino (Las Vegas, NV): $19.90 million
- SW Steakhouse (Las Vegas, NV): $19.30 million
- David Burke Primehouse (Chicago, IL): $18.48 million
- The Hamilton (Washington, DC): $18.38 million
- Sparks Steak House (New York, NY): $18.10 million
- St. Elmo Steakhouse (Indianapolis, IN): $17.73 million
- Prime Steakhouse (Las Vegas, NV): $17.60 million
- Del Posto (New York, NY): $17.60 million
- Bob Chinn’s Crab House (Wheeling, IL): $17.55 million
- The Smith - Lincoln Square (New York, NY): $17.47 million
- Mon Ami Gabi (Las Vegas, NV): $17.20 million
- ‘21’ Club (New York, NY): $17.08 million
- The Slanted Door (San Francisco, CA): $16.90 million
- Taste of Texas (Houston, TX): $16.89 million
- Chicago Cut Steakhouse (Chicago, IL): $16.87 million
- Balthazar (New York, NY): $16.70 million
<table>
<thead>
<tr>
<th>Restaurant Name</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Source (Washington, DC)</td>
<td>$16.70 million</td>
</tr>
<tr>
<td>Quality Meats (New York, NY)</td>
<td>$16.64 million</td>
</tr>
<tr>
<td>Guy's American Kitchen &amp; Bar (New York, NY)</td>
<td>$16.50 million</td>
</tr>
<tr>
<td>Wolfgang Puck Grand Cafe (Lake Buena Vista, FL)</td>
<td>$16.50 million</td>
</tr>
<tr>
<td>Shaw's Crab House (Chicago, IL)</td>
<td>$16.50 million</td>
</tr>
<tr>
<td>Grand Central Oyster Bar (New York, NY)</td>
<td>$16.20 million</td>
</tr>
<tr>
<td>Top of the World (Las Vegas, NV)</td>
<td>$16.20 million</td>
</tr>
<tr>
<td>Abe &amp; Louie’s (Boston, MA)</td>
<td>$16.20 million</td>
</tr>
<tr>
<td>Le Diplomate (Washington, DC)</td>
<td>$16.10 million</td>
</tr>
<tr>
<td>Lavo Italian Restaurant (Las Vegas, NV)</td>
<td>$16.00 million</td>
</tr>
<tr>
<td>Craftsteak (Las Vegas, NV)</td>
<td>$16.00 million</td>
</tr>
<tr>
<td>Angus Barn (Raleigh, NC)</td>
<td>$15.92 million</td>
</tr>
<tr>
<td>Chops Lobster Bar (Atlanta, GA)</td>
<td>$15.81 million</td>
</tr>
<tr>
<td>Gibsons Bar &amp; Steakhouse (Rosemont, IL)</td>
<td>$15.66 million</td>
</tr>
<tr>
<td>Sky City at the Needle (Seattle, WA)</td>
<td>$15.50 million</td>
</tr>
<tr>
<td>Scoma’s (San Francisco, CA)</td>
<td>$15.45 million</td>
</tr>
<tr>
<td>Gladstones (Pacific Palisades, CA)</td>
<td>$15.40 million</td>
</tr>
<tr>
<td>Spice Market (New York, NY)</td>
<td>$15.40 million</td>
</tr>
<tr>
<td>Quality Italian (New York, NY)</td>
<td>$15.33 million</td>
</tr>
<tr>
<td>Hugo’s Frog Bar &amp; Fish House (Chicago, FL)</td>
<td>$15.31 million</td>
</tr>
<tr>
<td>Sequoia (Washington, DC)</td>
<td>$15.20 million</td>
</tr>
<tr>
<td>The Manor (West Orange, NJ)</td>
<td>$15.17 million</td>
</tr>
<tr>
<td>Blue Fin (New York, NY)</td>
<td>$15.10 million</td>
</tr>
<tr>
<td>Rustic Inn Crabhouse (Dania Beach, FL)</td>
<td>$15.00 million</td>
</tr>
<tr>
<td>Junior’s (Brooklyn, NY)</td>
<td>$14.90 million</td>
</tr>
<tr>
<td>The Lobster House (Cape May, NJ)</td>
<td>$14.75 million</td>
</tr>
<tr>
<td>The Sea Grill (New York, NY)</td>
<td>$14.65 million</td>
</tr>
<tr>
<td>Harris Ranch Inn &amp; Restaurant (Coalinga, CA)</td>
<td>$14.59 million</td>
</tr>
<tr>
<td>Parc (Philadelphia, PA)</td>
<td>$14.56 million</td>
</tr>
<tr>
<td>The Smith - Midtown (New York, NY)</td>
<td>$14.45 million</td>
</tr>
<tr>
<td>Blue Water Grill (New York, NY)</td>
<td>$14.40 million</td>
</tr>
<tr>
<td>Coffee Shop (New York, NY)</td>
<td>$14.30 million</td>
</tr>
<tr>
<td>Harry Caray’s Italian Steakhouse (Chicago, IL)</td>
<td>$14.30 million</td>
</tr>
<tr>
<td>Portland City Grill (Portland, OR)</td>
<td>$14.27 million</td>
</tr>
<tr>
<td>The Four Seasons (New York, NY)</td>
<td>$14.15 million</td>
</tr>
<tr>
<td>Zehnder’s (Frankenmuth, MI)</td>
<td>$14.10 million</td>
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<tr>
<td>Jean-Georges Steakhouse (Las Vegas, NV)</td>
<td>$14.10 million</td>
</tr>
<tr>
<td>Bryant Park Grill (New York, NY)</td>
<td>$14.00 million</td>
</tr>
<tr>
<td>Gibsons Bar &amp; Steakhouse (Oak Brook, IL)</td>
<td>$13.93 million</td>
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<tr>
<td>The Milleridge Inn (Jeericho, NY)</td>
<td>$13.90 million</td>
</tr>
<tr>
<td>The Bazaar by José Andrés (Beverly Hills, CA)</td>
<td>$13.90 million</td>
</tr>
<tr>
<td>Delmonico Steakhouse (Las Vegas, NV)</td>
<td>$13.80 million</td>
</tr>
<tr>
<td>Rock Center Cafe (New York, NY)</td>
<td>$13.80 million</td>
</tr>
<tr>
<td>N9NE Steakhouse (Las Vegas, NV)</td>
<td>$13.66 million</td>
</tr>
</tbody>
</table>
• Atlanta Fish Market (Atlanta, GA): $13.54 million
• Virgil’s Real Barbecue (New York, NY): $13.52 million
• Cliff House (San Francisco, CA): $13.47 million
• Mike’s “American” (Springfield, VA): $13.40 million
• Quartino Ristorante (Chicago, IL): $13.19 million
• Boulevard (San Francisco, CA): $13.10 million
• Carmine’s (Atlantic City, NJ): $13.06 million
• Bavarian Inn (Frankenmuth, MI): $12.99 million
• Cafe Fiorello (New York, NY): $12.90 million
• Junior’s - Times Square (New York, NY): $12.80 million
• Keens Steakhouse (New York, NY): $12.70 million
• Daniel (New York, NY): $12.70 million
• Tavern on Rush (Chicago, IL): $12.68 million
• George’s at the Cove (La Jolla, CA): $12.65 million
• Spago (Las Vegas, NV): $12.60 million
• Makoto (Bal Harbour, FL): $12.43 million
• Tavern on the Green (New York, NY): $12.30 million
• Bartolotta Ristorante (Las Vegas, NV): $12.30 million
• The Southern Steak & Oyster (Nashville, TN): $12.28 million
• Morimoto (New York, NY): $12.11 million
• Phillips Seafood $12.09 million
• Fix (Las Vegas, NV): $12.05 million
• Alioto’s Restaurant (San Francisco, CA): $12.03 million
• Oceana (New York, NY): $12.00 million

49.2 Market Resources
Restaurant Business, 1 Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181. (630) 574-5075. (www.restaurantbusinessonline.com)
TOP MULTI-CHAIN OPERATORS

50.1 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):** $17.9 billion
  Brands: KFC, Pizza Hut, Taco Bell, WingStreet

- **Darden Restaurants Inc. (www.darden.com):** $9.0 billion
  Brands: Bahama Breeze, Eddie V’s, LongHorn Steakhouse, Olive Garden, Red Lobster, Seasons 52, The Capital Grille, Yard House

- **DineEquity (www.dineequity.com):** $7.5 billion
  Brands: Applebee’s Neighborhood Grill & Bar, IHOP

- **Roark Capital Group (www.roarkcapital.com):** $6.6 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):** $4.3 billion
  Brands: Bonefish Grill, Carrabba’s Italian Grill, Fleming’s Prime Steakhouse, Outback Steakhouse, Roy’s

- **Brinker International Inc. (www.brinker.com):** $4.0 billion
  Brands: Chili’s Grill & Bar, Maggiano’s Little Italy

- **Sun Capital Partners Inc. (www.suncappart.com):** $1.9 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): $ 1.4 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

51.1 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.

51.2 Largest Multi-Concept Operators
Ranked by annual sales, the following are the largest multi-concept operators (source: 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

51.3 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,

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

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, Café Fiorello’s, Fiorella Pizzeria E Caffe, 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.eshrg.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 Roya, 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
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 & Mickeys, Ocean Avenue Seafood, Pier Burger, Water Grill

Landry’s Restaurants Inc. (Houston, TX; www.landrysseafood.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

Lettuce Entertain You Enterprises (Chicago, IL; www.leye.com)
* Areas of operation: AZ, CA, IL, MN, NV, VA
* Annual sales: $400.0 million

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

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, Kendall’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,

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)
- Areas 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

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.tourdefrancenyc.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](http://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

### 51.4 Market Resources

Chain Store Guide, 10117 Princess Palm Avenue, Suite 375, Tampa, FL 33610. (800) 927-9292. ([www.chainstoreguide.com](http://www.chainstoreguide.com))
52.1 Top Clubs

_Nightclub and Bar Magazine_ annually ranks the top clubs in the United States by estimated revenue. The 2015 list is as follows:

- XS Nightclub (Las Vegas, NV): $103 million - $105 million
- Hakkasan (Las Vegas, NV): $100 million - $103 million
- Marquee Nightclub (Las Vegas, NV): $80 million - $85 million
- TAO Las Vegas (Las Vegas, NV): $50 million - $55 million
- LIV (Miami Beach, FL): $40 million - $45 million
- Surrender Nightclub (Las Vegas, NV): $40 million - $45 million
- LAVO New York (New York, NY): $30 million - $35 million
- Story (Miami Beach, FL): $25 million - $30 million
- Hyde Bellagio (Las Vegas, NV): $25 million - $30 million
- LAVO Las Vegas (Las Vegas, NV): $20 million - $25 million
- E11EVEN (Miami, FL): $20 million - $25 million
- Seacrets (Ocean City, MD): $20 million - $25 million
- Mango’s Tropical Café (Miami Beach, FL): $20 million - $25 million
- LEVU Dallas (Dallas, TX): $20 million - $25 million
- The Pool After Dark (Atlantic City, NJ): $20 million - $25 million
- Marquee NY (New York, NY): $15 million - $20 million
- PHD at Dream Downtown (New York, NY): $15 million - $20 million
- Chandelier Bar (Las Vegas, NV): $15 million - $20 million
- Tryst Las Vegas (Las Vegas, NV): $15 million - $20 million
- Create Nightclub (Los Angeles, CA): $15 million - $20 million
- Avenu Lounge (Dallas, TX): $15 million - $20 million
- The Abbey Food & Bar (Los Angeles, CA): $10 million - $15 million
- Club Space (Miami, FL): $10 million - $15 million
- Club db Lounge (Downey, CA): $10 million - $15 million
- Temple Nightclub (San Francisco, CA): $10 million - $15 million
- FLUXX (San Diego, CA): $10 million - $15 million
- Roof on the Wit (Chicago, IL): $10 million - $15 million
- Avalon Hollywood (Los Angeles, CA): $10 million - $15 million
- Chateau Nightclub & Rooftop (Las Vegas, NV): $10 million - $15 million
- Float (San Diego, CA): $10 million - $15 million
- Plush (Dallas, TX): $10 million - $15 million
- Avenue (New York, NY): $10 million - $15 million
• Maya Day + Nightclub (Scottsdale, AZ): $10 million - $15 million
• Passion Nightclub (Hollywood, FL): $10 million - $15 million
• Thrive Nightclub (Dallas, TX): $10 million - $15 million
• Landmark Bar & Kitchen (Fort Worth, TX): $10 million - $15 million
• AJ’s Club Bimini (Destin, FL): $10 million - $15 million
• Webster Hall (New York, NY): $10 million - $15 million
• Sutra Nightclub (Newport Beach, CA): $10 million - $15 million
• Heat Ultra Lounge (Anaheim, CA): $10 million - $15 million
• 207 (San Diego, CA): $10 million - $15 million
• Bar Anticipation (Lake Como, NJ): $10 million - $15 million
• Sevilla Nightclub (San Diego, CA): $10 million - $15 million
• Hurricane O’Reilly’s (Boston, MA): $10 million - $15 million
• Shrine (Mashantucket, CT): $10 million - $15 million
• Opera Nightclub (Atlanta, GA): $10 million - $15 million
• VIP Room (New York, NY): $10 million - $15 million
• Marge’s Lakeside Inn (Rochester, NY): $5 million - $10 million
• Ghostbar (Las Vegas, NV): $5 million - $10 million
• Pump Room Bar (Chicago, IL): $5 million - $10 million
• The Brahmin (Boston, MA): $5 million - $10 million
• Kilroy’s Bar n’ Grill (Indianapolis, IN): $5 million - $10 million
• echostage (Washington, DC): $5 million - $10 million
• Emerson Theatre (Los Angeles, CA): $5 million - $10 million
• Monarchy (West Palm Beach, FL): $5 million - $10 million
• Lagasse’s Stadium (Las Vegas, NV): $5 million - $10 million
• Playhouse Nightclub (Los Angeles, CA): $5 million - $10 million
• Side Bar (San Diego, CA): $5 million - $10 million
• Bassmnt Nightclub (San Diego, CA): $5 million - $10 million
• Greystone Manor (Los Angeles, CA): $5 million - $10 million
• Havana Club (Atlanta, GA): $5 million - $10 million
• Cake Nightclub (Scottsdale, AZ): $5 million - $10 million
• The Library Bar (Chicago, IL): $5 million - $10 million
• Shade Lounge (Scottsdale, AZ): $5 million - $10 million
• Dream Nightclub (Miami, FL): $5 million - $10 million
• Baja Sharkeez (Newport Beach, CA): $5 million - $10 million
• Bond Bar (Las Vegas, NV): $5 million - $10 million
• Vesper Bar (Las Vegas, NV): $5 million - $10 million
• The Bourbon Room (Las Vegas, NV): $5 million - $10 million
• The Wood (San Diego, CA): $5 million - $10 million
• Grizzly Rose (Denver, CO): $5 million - $10 million
• High Rollers (Mashantucket, CT): $5 million - $10 million
• Baja Sharkeez (Hermosa Beach, CA): $5 million - $10 million
• Sandbar Cocina Y Tequila (Santa Barbara, CA): $5 million - $10 million
• Celebrations Nitelife (Myrtle Beach, SC): $5 million - $10 million
• Panama Joe’s Cantina (Long Beach, CA): $5 million - $10 million
• The Scorpion Bar (Mashantucket, CT): $5 million - $10 million
• The Estate (Boston, MA): $5 million - $10 million
• The Huxley (Washington, DC): $5 million - $10 million
• Baja Sharkeez (Huntington Beach, CA): $5 million - $10 million
• RIO Nightclub (Austin, TX): $5 million - $10 million
• Bounce Sporting Club (New York, NY): $5 million - $10 million
• La Puerta (San Diego, CA): $3 million - $5 million
• Kingston Mines (Chicago, IL): $3 million - $5 million
• Teak Neighborhood Grill (Orlando, FL): $3 million - $5 million
• Round-Up Saloon (Dallas, TX): $3 million - $5 million
• Whiskey River (Houston, TX): $3 million - $5 million
• SHOTS Miami (Miami, FL): $3 million - $5 million
• Southern Railway Taphouse (Richmond, VA): $3 million - $5 million
• Skooter's Roadhouse (Shorewood, IL): $3 million - $5 million
• Proof Rooftop Lounge (Houston, TX): $3 million - $5 million
• Sisu Uptown (Dallas, TX): $3 million - $5 million
• Barley House (Cleveland, OH): $3 million - $5 million
• Drink Houston (Houston, TX): $3 million - $5 million
• The Wild Rover (Boston, MA): $3 million - $5 million
• Eagles Nest Rockin' Country Bar (Chesapeake, VA): $3 million - $5 million
• Southern Junction (Royse City, TX): $3 million - $5 million
• Chilkoot Charlie’s (Anchorage, AK): $3 million - $5 million
• Wild West (San Antonio, TX): $3 million - $5 million
• Luxx Nightclub (Dallas, TX): $3 million - $5 million
• The Raven (New York, NY): $3 million - $5 million
PART VIII: NEW & EMERGING RESTAURANT BRANDS
53.1 Lists For 2015

The following are critics’ lists recognizing the best new restaurants in the United States:

**Bon Appétit**
- AL’s Place (San Francisco, CA)
- Dai Due (Austin, TX)
- Gjusta (Los Angeles, CA)
- Kindred (Davidson, NC)
- Manolin (Seattle, WA)
- Milktooth (Indianapolis, IN)
- Parachute (Chicago, IL)
- Petit Trois (Los Angeles, CA)
- Rintaro (San Francisco, CA)
- Semilla (Brooklyn, NY)

**Esquire**
- B.S. Taqueria and Broken Spanish (Los Angeles, CA)
- Dolo Restaurant and Bar (Chicago, IL)
- Jockey Hollow Bar & Kitchen (Morristown, NJ)
- Little Park (New York, NY)
- Momotaro (Chicago, IL)
- Mountain Bird (New York, NY)
- Muscadine (Portland, OR)
- Santina (New York, NY)
- Shaya (New Orleans, LA)
- Shuko (New York, NY)
- The Duck Inn (Chicago, IL)
- The Grey (Savannah, GA)
- The Progress (San Francisco, CA)
- Townsman (Boston, MA)

**Gayot** ([www.gayot.com](http://www.gayot.com))
- Cosme (New York, NY)
- FarmTable Kitchen (St. Petersburg, FL)
- Giada (Las Vegas, NV)
• Liquid Art House (Boston, MA)
• Maude (Beverly Hills, CA)
• Momotaro (Chicago, IL)
• Monsieur Benjamin (San Francisco, CA)
• Pax Americana (Houston, TX)
• The Grey (Savannah, GA)
• Tray Kitchen (Seattle, WA)

**GQ**
• Alimento (Los Angeles, CA)
• Ananda (Fulton, MD)
• Ataula (Portland, OR)
• Dai Due (Austin, TX)
• Fiola Mare (Washington, DC)
• Kachka (Portland, OR)
• Killen’s Barbecue (Houston, TX)
• Kin Kaho (San Francisco, CA)
• Langbaan (Portland, OR)
• Laurel (Philadelphia, PA)
• Lo Spiedo (Philadelphia, PA)
• Lusca (Atlanta, GA)
• mfk (Chicago, IL)
• Pax Americana (Houston, TX)
• Pink Zebra (San Francisco, CA)
• Rose’s Luxury Garden (Washington, DC)
• Santina (New York, NY)
• Sarma (Somerville, MA)
• Shi Hai (Los Angeles, CA)
• Shuko (New York, NY)
• smoke.oil.salt (Los Angeles, CA)
• Spice to Table (Atlanta, GA)
• St. Philip Bakeshop (Austin, TX)
• Trove (Seattle, WA)

**James Beard Foundation**
• Bâtard (New York, NY)
• Central Provisions (Portland, ME)
• Cosme (New York, NY)
• Parachute (Chicago, IL)
• Petit Trois (Los Angeles, CA)
• The Progress (San Francisco, CA)
• Spoon and Stable (Minneapolis, MN)
Thrillist (www.thrillist.com)
- 492 (Charleston, SC)
- Amilinda (Milwaukee, WI)
- Armoury D.E. (Dallas, TX)
- Baroo (Los Angeles, CA)
- Barcero (San Diego, CA)
- Bread and Salt (Pittsburgh, PA)
- Del Popolo (San Francisco, CA)
- Hojoko (Boston, MA)
- Lupulo (New York, NY)
- Mabel Gray (Hazel Park, MI)
- Maketto (Washington, DC)
- Manolin (Seattle, WA)
- Milktooth (Indianapolis, IN)
- Octavia (San Francisco, CA)
- Shaya (New Orleans, LA)
- Spoon & Stable (Minneapolis, MN)
- The Blanchard (Chicago, IL)
- The Grey (Savannah, GA)
- The Progress (San Francisco, CA)
- Townsman (Boston, MA)
- Wildair (New York, NY)

USA Today Readers’ Choice
- Biscuit Love (Nashville, TN)
- Broken Spanish (Los Angeles, CA)
- Chomp Chomp (New York, NY)
- Duck Inn (Chicago, IL)
- Momotaro (Chicago, IL)
- Radish & Rye (San Francisco, CA)
- The Grey (Savannah, GA)
- The Progress (San Francisco, CA)
- Timna (New York, NY)
- Townsman (Boston, MA)
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BREAKOUT BRANDS

54.1 Overview

Since 2013, Nation’s Restaurant News has identified Breakout Brands, defined as restaurant brands that are on the leading edge of restaurant trends.

“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. These are 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

54.2 Breakout Brands 2015

The following are the 2015 Breakout Brands:

- 100 Montaditos
- Chicken Salad Chick
- Cream
- Dog Haus
- Eureka!
- Lemonade
- Native Foods Cafe
- Punch Bowl Social
- Rock & Brews
- Rusty Taco
54.3 Recent Designations

The following are recently designated Breakout Brands:

2014

• 4 Rivers
• Barcelona
• Bareburger
• Burger Lounge
• Firebirds Wood Fired Grill
• Rusty Bucket
• Snap Kitchen
• Sweetgreen
• Tazikis
• Tom + Chee

2013

• 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
• Bruxiè
• 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

54.4 Market Resources

Nation’s Restaurant News, 249 W. 17th Street, New York, NY 10011. (212) 204-4200. (www.nrn.com)
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FUTURE 50

55.1 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).

55.2 Fastest-Growing Chains 2015

The 2015 Future 50 are as follows:

<table>
<thead>
<tr>
<th>Name</th>
<th>Sales</th>
<th>Growth</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pieology Pizzeria:</td>
<td>$44.6 million</td>
<td>230.4%</td>
<td>42</td>
</tr>
<tr>
<td>Blaze Pizza:</td>
<td>$33.0 million</td>
<td>230.0%</td>
<td>50</td>
</tr>
<tr>
<td>Smalccakes A Cupcakery:</td>
<td>$38.7 million</td>
<td>133.1%</td>
<td>88</td>
</tr>
<tr>
<td>Nékter Juice Bar:</td>
<td>$26.8 million</td>
<td>119.7%</td>
<td>46</td>
</tr>
<tr>
<td>MOD Pizza:</td>
<td>$27.0 million</td>
<td>107.7%</td>
<td>31</td>
</tr>
<tr>
<td>Salata:</td>
<td>$33.3 million</td>
<td>89.2%</td>
<td>41</td>
</tr>
<tr>
<td>Rock &amp; Brews:</td>
<td>$32.1 million</td>
<td>52.9%</td>
<td>7</td>
</tr>
<tr>
<td>Nando’s Peri-Peri:</td>
<td>$32.6 million</td>
<td>52.5%</td>
<td>20</td>
</tr>
<tr>
<td>Paul Martin’s American Grill:</td>
<td>$34.5 million</td>
<td>45.9%</td>
<td>8</td>
</tr>
<tr>
<td>Bagger Dave’s Burger Tavern:</td>
<td>$27.0 million</td>
<td>44.9%</td>
<td>24</td>
</tr>
<tr>
<td>Lemonade:</td>
<td>$36.0 million</td>
<td>40.6%</td>
<td>16</td>
</tr>
<tr>
<td>Bareburger:</td>
<td>$46.5 million</td>
<td>39.2%</td>
<td>21</td>
</tr>
<tr>
<td>The Original Brooklyn Water Bagel Co.:</td>
<td>$42.1 million</td>
<td>38.0%</td>
<td>25</td>
</tr>
<tr>
<td>Torchy’s Tacos:</td>
<td>$25.0 million</td>
<td>37.4%</td>
<td>26</td>
</tr>
<tr>
<td>Billy Sims Barbecue:</td>
<td>$31.0 million</td>
<td>37.2%</td>
<td>44</td>
</tr>
<tr>
<td>Native Foods Café:</td>
<td>$45.0 million</td>
<td>35.5%</td>
<td>25</td>
</tr>
<tr>
<td>Taziki’s Mediterranean Cafe:</td>
<td>$48.6 million</td>
<td>34.6%</td>
<td>36</td>
</tr>
<tr>
<td>Eureka!:</td>
<td>$30.6 million</td>
<td>34.2%</td>
<td>14</td>
</tr>
<tr>
<td>Veggie Grill:</td>
<td>$35.4 million</td>
<td>33.1%</td>
<td>26</td>
</tr>
<tr>
<td>Freshii:</td>
<td>$41.8 million</td>
<td>32.3%</td>
<td>52</td>
</tr>
<tr>
<td>Sandella’s Flatbread Café:</td>
<td>$32.3 million</td>
<td>31.8%</td>
<td>107</td>
</tr>
<tr>
<td>Barcelona Wine Bar &amp; Restaurant:</td>
<td>$43.8 million</td>
<td>29.6%</td>
<td>10</td>
</tr>
<tr>
<td>Rusty Bucket Restaurant and Tavern:</td>
<td>$43.6 million</td>
<td>29.4%</td>
<td>17</td>
</tr>
<tr>
<td>Yogen Frúz:</td>
<td>$27.4 million</td>
<td>28.6%</td>
<td>117</td>
</tr>
<tr>
<td>Paris Baguette:</td>
<td>$29.4 million</td>
<td>27.3%</td>
<td>38</td>
</tr>
<tr>
<td>Bob’s Steak &amp; Chop House:</td>
<td>$38.4 million</td>
<td>25.5%</td>
<td>11</td>
</tr>
<tr>
<td>Restaurant</td>
<td>Revenue (millions)</td>
<td>Growth (%)</td>
<td>Rank</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>--------------------</td>
<td>------------</td>
<td>------</td>
</tr>
<tr>
<td>Little Sheep Mongolian Hot Pot</td>
<td>$35.4 million</td>
<td>22.1%</td>
<td>16</td>
</tr>
<tr>
<td>Wings Etc. Grill &amp; Pub</td>
<td>$32.9 million</td>
<td>21.0%</td>
<td>32</td>
</tr>
<tr>
<td>Toppers Pizza</td>
<td>$48.8 million</td>
<td>20.3%</td>
<td>67</td>
</tr>
<tr>
<td>North Italia</td>
<td>$30.5 million</td>
<td>20.1%</td>
<td>7</td>
</tr>
<tr>
<td>Marlow’s Tavern</td>
<td>$48.5 million</td>
<td>18.3%</td>
<td>15</td>
</tr>
<tr>
<td>Dinosaur Bar-B-Que</td>
<td>$27.2 million</td>
<td>18.3%</td>
<td>8</td>
</tr>
<tr>
<td>Tokyo Joe’s</td>
<td>$30.1 million</td>
<td>17.6%</td>
<td>30</td>
</tr>
<tr>
<td>Taco Casa</td>
<td>$36.6 million</td>
<td>16.9%</td>
<td>70</td>
</tr>
<tr>
<td>Zoup! Fresh Soup Company</td>
<td>$46.3 million</td>
<td>16.9%</td>
<td>63</td>
</tr>
<tr>
<td>Barberitos</td>
<td>$27.9 million</td>
<td>16.7%</td>
<td>39</td>
</tr>
<tr>
<td>East Coast Wings &amp; Grill</td>
<td>$38.0 million</td>
<td>16.6%</td>
<td>32</td>
</tr>
<tr>
<td>Ono Hawaiian BBQ</td>
<td>$30.8 million</td>
<td>16.2%</td>
<td>53</td>
</tr>
<tr>
<td>American Deli</td>
<td>$48.8 million</td>
<td>15.4%</td>
<td>96</td>
</tr>
<tr>
<td>The Rock Wood Fired Kitchen</td>
<td>$47.0 million</td>
<td>15.2%</td>
<td>21</td>
</tr>
<tr>
<td>Jimmy’s Egg</td>
<td>$27.9 million</td>
<td>14.6%</td>
<td>40</td>
</tr>
<tr>
<td>Showmars</td>
<td>$30.5 million</td>
<td>13.0%</td>
<td>33</td>
</tr>
<tr>
<td>Russo’s New York Pizzeria</td>
<td>$31.1 million</td>
<td>12.7%</td>
<td>36</td>
</tr>
<tr>
<td>Iron Hill Brewery &amp; Restaurant</td>
<td>$30.0 million</td>
<td>12.4%</td>
<td>11</td>
</tr>
<tr>
<td>Bono’s Pit Bar-B-Q</td>
<td>$30.3 million</td>
<td>11.8%</td>
<td>22</td>
</tr>
<tr>
<td>Hale and Hearty Soups</td>
<td>$27.7 million</td>
<td>11.7%</td>
<td>33</td>
</tr>
<tr>
<td>Native Grill &amp; Wings</td>
<td>$43.7 million</td>
<td>11.5%</td>
<td>31</td>
</tr>
<tr>
<td>Leo’s Coney Island</td>
<td>$30.4 million</td>
<td>11.4%</td>
<td>54</td>
</tr>
<tr>
<td>Another Broken Egg Cafe</td>
<td>$42.9 million</td>
<td>11.0%</td>
<td>41</td>
</tr>
<tr>
<td>Mackenzie River Pizza</td>
<td>$28.4 million</td>
<td>10.3%</td>
<td>23</td>
</tr>
</tbody>
</table>

**55.3 Market Resources**

*Restaurant Business*, One Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181. (630) 574-5075. ([www.restaurantbusinessonline.com](http://www.restaurantbusinessonline.com))

Technomic, Inc., 300 South Riverside Plaza, Suite 1200, Chicago, IL 60606. (312) 876-0004. ([www.technomic.com](http://www.technomic.com))
56.1 Hot Concepts 2015
Each year the editors of Nation’s Restaurant News select emerging restaurant brands that have distinguished themselves as Hot Concepts. The brands are viewed as at the leading edge of foodservice trends and positioned for significant growth.

The following brands were given the Hot Concepts designation in 2015:

- Bareburger
- Cava Mezze Grill
- Eureka!
- Tortas Fronteria
- VertsKebap

56.2 Recent Designations
Restaurant brands selected for past Hot Concepts! designation are as follows:

2014
- LYFE Kitchen
- PDQ
- Protein Bar
- Slater’s 50/50
- Snap Kitchen

2013
- Fresh to Order
- Max’s Wine Dive
- Modmarket
- Piada Italian Street Food
- Umami Burger

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

56.3 Market Resources
Nation’s Restaurant News, 249 W. 17th Street, New York, NY 10011. (212) 204-4200. (www.nrn.com)
57

THE NEXT 20

57.1 Overview

In conjunction with its assessment of the Top 200 restaurant chains (see Chapter 43), Nation’s Restaurant News identifies chains most likely to grow and enter the ranking of the Top 200 in the future. These chains are dubbed The Next 20.

57.2 2015’s Next 20

The following is the 2015 list of Next 20 restaurant chains (source: Nation’s Restaurant News):

| RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2016-2017 | 288 |
“The Next 20 chains had average year-over-year growth in U.S. systemwide sales of 29.4% in their latest fiscal year, nearly five times the rate recorded by Top 200 chains.”

Nation’s Restaurant News, 8/10/15

57.3 Market Resources
Nation’s Restaurant News, 1166 Avenue of the Americas, 10th Floor, New York, NY 10036. (212) 204-4200. (www.nrn.com)
PART IX: DINING TRENDS & ANALYSES
CELEBRITY CHEFS

58.1 Cooking Shows On Television

The Harris Poll (www.theharrispoll.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.

58.2 Most Popular Chefs On Television

The following are among the most popular chefs on current/past television shows:
Mario Batali
• Shows: Ciao America with Mario Batali, Iron Chef America, Mario Eats Italy, Molto Mario, The Chew
• Restaurants: Babbo, Osteria Mozza, Del Posto, and others
• Branded retail products: Cookware and kitchen tools at Crate and Barrel, Lenox.com, and Macy’s

Rick Bayless
• Shows: Mexico: One Plate at a Time
• Restaurants: Frontera Grill, Topolobampo, XOCO, Frontera Fresco, Tortas Frontera

Anthony Bourdain
• Shows: A Cook’s Tour, Anthony Bourdain: No Reservations, Anthony Bourdain: Parts Unknown, The Layover
• Restaurants: Brasserie Les Halles

Tom Colicchio
• Shows: Top Chef
• Restaurants: Craft, Craftbar, Craftsteak, ‘wichcraft, Colicchio & Sons, Riverpark

Guy Fieri
• Shows: Food Network’s Diners, Drive-Ins and Dives, Guy’s Big Bite, and Tailgate Warriors
• Restaurants: Guy Fieri’s Vegas Kitchen and Bar, Johnny Garlic’s
• Branded retail products: Lifeline brand cookware, Ergo Chef cutlery, Fox Run barbecue tools

Bobby Flay
• Shows: Food Network’s Bobby Flay’s Barbecue Addiction, Grill It!, Iron Chef America, Throwdown with Bobby Flay, and more
• Restaurants: Bobby Flay Steak, Bobby’s Burger Palace, Mesa Grill, Bar Americain

Emeril Lagasse
• Host of shows on the Food Network, Cooking Channel, and Hallmark Channel
• Restaurants: Emeril’s Delmonico, Emeril’s New Orleans, NOLA Restaurant, and more
• Branded retail products: Gorham dinnerware, T-Fal cookware, and small electronics

Jamie Oliver
• Shows: The Naked Chef, Jamie’s Kitchen, Jamie Oliver’s Food Revolution, and more
• Restaurants: Barbecoa, Fifteen, Jamie’s Italian, Union Jacks, Jamie Oliver’s Diner
Wolfgang Puck
• Guest judge on *Top Chef, Hell’s Kitchen, The Next Food Network Star*
• Restaurants: CUT, Postrio, Spago, Wolfgang Puck Bistro, WP24, and more
• Branded retail products: cookware sold at Bed Bath & Beyond, HSN, and other retailers

Gordon Ramsay
• Shows: *Hell’s Kitchen, Kitchen Nightmares, Masterchef*, and more
• Restaurants: Petrus, Restaurant Gordon Ramsay, Savoy Grill, and more

Rachel Ray
• Food Network’s *30-Minute Meals and Every Day With Rachel Ray*
• Branded retail products: Cookware and culinary at Bed Bath & Beyond, cooking.com, Kohl’s, and Target

Ming Tsai
• Shows: *East Meets West, Simply Ming*
• Restaurants: Blue Ginger, Blue Dragon

Andrew Zimmern
• Shows: *Bizarre Foods with Andrew Zimmern, Andrew Zimmern’s Bizarre World, Bizarre Foods America*
• Restaurants: AZ Canteen

58.3 Top-Earning Chefs

Celebrity New Worth (www.celebritynetworth.com) estimates the net worth of celebrity chefs as follows:
• Jamie Oliver: $400 million
• Gordon Ramsay: $140 million
• Wolfgang Puck: $75 million
• Rachael Ray: $60 million
• David Chang: $50 million
• Emeril Lagasse: $50 million
• Vikram Vij: $50 million
• Charlie Ayers: $45 million
• Levi Roots: $45 million
• Ina Garten: $40 million
• Marco Pierre White: $40 million
• Julia Child: $38 million
• Thomas Keller: $30 million
• Mario Batali: $25 million
• Bobby Flay: $20 million
• Christopher Kimball: $ 20 million
• Giada De Laurentiis: $ 20 million
• Jacques Pépin: $ 20 million
• Sandra Lee: $ 20 million
• Tom Colicchio: $ 20 million
• Anthony Bourdain: $ 16 million
• Robert Irvine: $ 15 million
• Todd English: $ 15 million
• Tyler Florence: $ 15 million
• Paula Deen: $ 14 million
• Alton Brown: $ 13 million
• Alain Ducasse: $ 10 million
• Alain Ducasse: $ 10 million
• Buddy Valastro: $ 10 million
• Gino D’Acampo: $ 10 million
• MingTsai: $ 10 million
• Shannon Bennett: $ 10 million
• Guy Fieri: $ 9 million
• Andrew Zimmern: $ 8 million
• Anna Olson: $ 8 million
• Curtis Stone: $ 8 million
• John Besh: $ 8 million
• Ree Drummond: $ 8 million
• Geoffrey Zakarian: $ 6 million
• Anne Burrell: $ 5 million
• Duff Goldman: $ 5 million
• James Martin: $ 5 million
• Matt Moran: $ 5 million
• Matt Preston: $ 5 million
• Richard Blais: $ 5 million
• Ron Ben-Israel: $ 5 million
• Scott Conant: $ 5 million
• Sunny Anderson: $ 5 million
• Ted Allen: $ 5 million
59.1 The Kids LiveWell Initiative

The National Restaurant Association launched the Kids LiveWell Program (www.restaurant.org/Industry-Impact/Food-Healthy-Living/Kids-LiveWell-Program) 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 at year-end 2015.

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, or low-fat dairy, while restricting unhealthful fats, sugar, and sodium. Also, participating restaurants must provide and promote nutritional information.

59.2 Healthful Kids' Menus At QSRs

According to the National Restaurant Association, healthful options in kids' meals was the No. 8 trend in the quick-service restaurant (QSR) segment in 2015. It was the No. 1 trend as recently as 2011. The emphasis has waned, in large part, because restaurants now have healthful meal options for children's fare in place.

McDonald's launched the Happy Meal Choice program in 2004. McDonald's also 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 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, plus 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.

59.3 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 the Back to School Trends Report, 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 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.
- Approximately one-third purchased more locally-grown or locally-raised items for the 2014-2015 school year than in the previous 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%) actually try to encourage students to try these new menu items, with over 87% employing student taste testing/sampling. 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.
59.4 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)
60

DINING WHILE TRAVELING

60.1 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.

60.2 Culinary Destinations
According to the U.S. Travel Association (USTA, www.ustravel.org), the top destinations for food- and wine-related travel are as follows:

<table>
<thead>
<tr>
<th>Food-Related Travel</th>
<th>Wine-Related Travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td>California</td>
</tr>
<tr>
<td>Florida</td>
<td>New York</td>
</tr>
<tr>
<td>New York</td>
<td>Missouri</td>
</tr>
<tr>
<td>Texas</td>
<td>North Carolina</td>
</tr>
<tr>
<td>North Carolina</td>
<td>Oregon</td>
</tr>
<tr>
<td>Georgia</td>
<td>Pennsylvania</td>
</tr>
</tbody>
</table>

The Readers Choice Awards poll by 10Best (www.10best.com), a USA Today travel site, ranked the best destinations for foodies as follows:

- Chicago, IL
- New Orleans, LA
- New York, NY
- Las Vegas, NV
- San Francisco, CA
- Charleston, SC
- Boston, MA
- Memphis, TN
- Washington, DC
- Atlanta, GA

60.3 Sampling Tours
Combining culinary interests with walking tours, sampling tours have become a 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 sampling-tour concept has also caught on in Seattle. Savor Seattle Tours (www.savorseattletours.com) offers six food tours in the area, including the VIP Pike Place Tour, Chocolate Indulgence, and Booze n’ Bites. 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 Art Deco Breakfast Tour ($35), Little Havana Food Tour ($59), South Beach Food Tour ($59), and Wynwood Food Tour ($69).

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 are popular. The following are two 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.’
- Foods of New York Tours (www.foodsofny.com) offers tours of shops and restaurants in Brooklyn, Chelsea Market and The Meatpacking District, Central Village and SoHo, Chinatown, and Nolita/NoHo.

Tour de Food (www.tourdefood.com) offers seven food tours throughout North Carolina that visit independently owned restaurants ranging from fine dining to hidden dives frequented by locals. There are tours in Charlotte, Davidson, Greensboro, and Winston-Salem.

### 60.4 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 2015. 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.

60.5 Whiskey and Bourbon Trails

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.

The Kentucky Bourbon Trail (www.kybourbontrail.com), formed by the Kentucky Distillers’ Association in 1999, includes tours at seven distilleries. The trail attracted over 500,000 visitors in 2013; 85% were from outside Kentucky.

In 2012, Jim Beam opened a visitor center called the Jim Beam American Stillhouse, a replica of a 1930s stillhouse. The $20 million center sparked an increase in annual visitors to more than 200,000 from 80,000.

In Bardstown, Kentucky, Heaven Hill Distilleries’ Bourbon Heritage Center (www.bourbonheritagecenter.com) attracts 20,000 visitors a year.

60.6 Market Resources
Kentucky Bourbon Trail, 614 Shelby Street, Frankfort, KY 40601. (502) 875-9351. (http://kybourbontrail.com)

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


World Food Travel Association, 4110 SE Hawthorne Boulevard, Suite 440, Portland, OR 97214. (503) 213-3700. (www.worldfoodtravel.org)
61

DINING WITH ENTERTAINMENT

61.1 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.

61.2 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.houseofblues.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, 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)

61.3 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.

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.

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.
One of the most successful theme restaurant concepts is Chuck E. Cheese’s (www.chuckcheese.com), which launched in 1977. The child-friendly pizza chain has 545 locations.

### 61.4 Experiential Restaurants

Some restaurants pair an entertainment experience with meal options. The following are notable examples:

- **Dave & Buster’s** (www.daveandbusters.com) combines dining within 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. The are now 72 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 at 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.


- **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, pagentry, 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 and San Francisco, CA; www.darkdining.com) is precisely what the name implies. Customers are led into a pitch-black dining room where they rely on their other four senses during their three-course meal. The waiters are legally blind. The concept launched in 2005.

### 61.5 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.semgulf.com)
• Sleuths Mystery Dinner Show (Orlando, FL; www.sleuths.com)
• The Dinner Detective (31 locations; www.thedinnerdetective.com)

61.6 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.
• AMC Theatres teamed with renowned restaurateur Danny Meyer and his Union Square Hospitality Group to launch the AMC Red Kitchen concept. The first restaurant opened in Aurora, Colorado, in 2015.
• 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.cobbcinebistro.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.

61.7 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:
• In Tampa, Florida, a password is needed to gain entrance to Ciro’s Speakeasy
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.

**61.8 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.titledkilt.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.bestwestern.com) 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, ND; 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 features 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 of clothes for dry cleaning.

• Housed in a Chateauesque 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.luckychensnewyork.com) with a location in Las Vegas, offers guests pan-Asian cuisine with a drag show.
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DOG-FRIENDLY RESTAURANTS

62.1 Overview

The American Pet Products Association (www.americanpetproducts.org) estimates that approximately 56.7 million U.S. households (46% of all households) own a dog.

For most dog owners, their pets are valued as companions and friends. In a Harris Poll (www.theharrispoll.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_

62.2 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.

Federal law does not ban domesticated animals from restaurants, but the Food and Drug Administration (www.fda.gov) discourages pet-friendly policies. Many states, therefore, prohibit them. But they are undermined by more tolerant rules at the local level. Austin, for example, allows dogs on restaurant patios, though Texas does not.

“With health-and-safety laws already keeping things clean, it is not clear why state and local governments – as opposed to restaurants – should decide whether dogs are allowed to eat out.”

_The Economist, 8/30/15_

Bringfido.com, Dogfriendly.com, and Petfriendlytravel.com provide listings of restaurants nationwide that permit guests with dogs.

**62.3 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.

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.

### 62.4 Market Resources
American Pet Products Association, 255 Glenville Road, Greenwich, CT 06831. (203) 532-0000. ([www.americanpetproducts.org](http://www.americanpetproducts.org))
FOOD & WINE FESTIVALS

63.1 Overview
More than 1,000 food festivals are held annually across the United States.

63.2 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)
- Fells Point Fun Festival (www.fellspointfunfest.com)
- 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-$1 (Marlinton, WV; http://pccoqvw.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.dallascwineandfoodfestival.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 celebrated its 35th year in 2016. 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 15th year, the 2016 festival was held February 24-28. 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.

63.3 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


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HEALTHY DINING

64.1 Healthful Dining

Restaurant operators will continue to emphasize healthier fare in 2016 as more and more consumers are becoming nutrition conscious.

“Across the board, restaurants of all types and sizes have been offering more healthful food choices. Research shows that 85% of American adults say there are more healthy options at restaurants compared to just two years ago.”

National Restaurant Association, 1/7/16

In a 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:

<table>
<thead>
<tr>
<th>Gender</th>
<th>FSR</th>
<th>LSR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female:</td>
<td>68%</td>
<td>72%</td>
</tr>
<tr>
<td>Male:</td>
<td>59%</td>
<td>57%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>FSR</th>
<th>LSR</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-to-34:</td>
<td>66%</td>
<td>67%</td>
</tr>
<tr>
<td>35-to-44:</td>
<td>59%</td>
<td>61%</td>
</tr>
<tr>
<td>45-to-54:</td>
<td>63%</td>
<td>64%</td>
</tr>
<tr>
<td>55-to-64:</td>
<td>65%</td>
<td>66%</td>
</tr>
<tr>
<td>65 and older:</td>
<td>66%</td>
<td>64%</td>
</tr>
</tbody>
</table>
According to the Healthy Eating Consumer Trend Report, a 2015 report by Technomic (www.technomic.com), 58% of consumers agree that it is important to eat healthfully and pay attention to nutrition. Thirty-eight percent (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. 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.

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.

The U.S. Food and Drug Administration issued regulations for menu-labeling in late 2011. Restaurant chains with 20 or more units are now required to post on their menus and drive-through signs calorie counts and information about how many calories a healthy person should eat daily.

### 64.2 Federal Guidelines

Dietary Guidelines for Americans, a source for nutrition advice, is published every five years by the U.S. Department of Agriculture (USDA, www.usda.gov) and U.S. Department of Health & Human Services (HHS, www.hhs.gov). The guidelines are designed to help Americans make healthy food and beverage choices and serve as the foundation for vital nutrition policies and programs across the U.S.

The most recent guidelines (http://health.gov/DietaryGuidelines), published in January 2016, promoted what the agencies call “small, doable shifts” in daily eating habits to curb obesity and diet-related diseases. There were five overarching guidelines:

- Follow a healthy eating pattern across the lifespan.
- Focus on variety, nutrient-dense foods, and amount.
- Limit calories from added sugars and saturated fats, and reduce sodium intake.
- Shift to healthier food and beverage choices.
- Support healthy eating patterns for all, including a variety of nutritious foods like vegetables, fruit, grain, low-fat and fat-free dairy, lean meat and other protein, and oil, while limiting saturated fats, trans fats, added sugars, and sodium.

At least half the grains Americans consume should be whole grain, according to the guidelines. People are encouraged to consume less than 10% of calories a day from added sugar and less than 10% of calories a day from saturated fat.

### 64.3 Priorities in Health-Conscious Eating

A 2015 survey by The NPD Group found reducing sugar and fat consumption are the top priorities for healthful eating. Sixty-five percent (65%) of adults reported trying to cut back on sugar; 64% are attempting to cut back on fats. The survey also found that consumption of fresh foods – fruits, vegetables, meat, poultry, fish, and eggs –
increased 20% over the past decade, to over 100 billion annual consumption occasions.

According to a 2015 survey by The Hartman Group (www.hartman-group.com), consumers’ emphasis in food choices are as follows (percentage of respondents):

- Locally grown/produced: 67%
- Contain only recognized ingredients: 65%
- Minimally processed: 65%
- Free of antibiotics: 58%
- Free of hormones: 58%

### 64.4 Food Additives

The National Restaurant Association surveys member chefs of the American Culinary Federation (www.acfchefs.org) annually asking them to rank over 200 culinary items. Natural ingredients and minimally processed food ranked among the top two trends in 2015.

In a 2015 survey by The NPD Group, 57% of adults said they are concerned about genetically-modified organisms (GMOs), an increase from 46% that had this concern 10 years prior.

The NPD Group classifies as ‘clean eaters’ consumers that are concerned about additives, chemicals, pesticides, and preservatives in the food they eat. Clean Eaters are distributed by age as follows:

- 17 and younger: 22%
- 18-to-24: 12%
- 25-to-34: 12%
- 35-to-55: 35%
- 56 and older: 19%

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“Health to consumers now is more about the purity of the foods they eat versus the absence of negatives, such as fats, or even the presence of positives. The big picture is that consumers are seeking items which have had minimal processing, and are focused on avoiding unnatural elements, like artificial sweeteners, high fructose corn syrup, preservatives, additives, and GMOs.”

The NPD Group, 1/5/16

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**Attitudes Toward Additives**, a June 2015 survey-based report by Technomic (www.technomic.com), reported the following consumers’ concerns about food additives:

- Seventy-eight percent (78%) view ‘no artificial sweeteners’ as healthier.
- Seventy-three percent (73%) say that antibiotic-free food or beverages are healthier.
- Sixty percent (60%) of consumers say natural meat is healthier.
- Forty-three percent (43%) choose additive-free food and beverages because of better health.
- Thirty-three percent (33%) would pay more for antibiotic-free proteins.
- Thirty-one percent (31%) would pay more for GMO-free proteins.
- Thirty percent (30%) say GMO-free foods and beverages are tastier.

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“Today’s consumers want wholesome, nutritious foods they can feel good about eating, and that increasingly translates into demand for natural and additive-free ingredients. More than half of consumers tell us they want greater menu transparency, and more restaurant chains are moving in that direction.”

Kelly Weikel  
Director of Consumer Insights  
Technomic, 6/24/15

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64.5 **Sugar Consumption**

The USDA and HHS recommend that people should consume less than 10% of calories a day from added sugar.

Guidelines from the World Health Organization (WHO, www.who.org) recommend that only 5% of total daily calories should come from added sugar. This amounts to about 26 grams per day for a 2,000-calorie diet. The WHO revised this guideline in 2014; the previous guideline was 10%, the same as the USDA and HHS.

The American Heart Association (www.heart.org) suggests no more than from 30 grams to 45 grams of added sugar per day.

The typical U.S. diet exceeds all of these guidelines. The Centers for Disease Control and Prevention (www.cdc.gov) estimates that 13% of adults’ total caloric intake comes from sugar.
“Consumers will continue in 2016 the trend of being more concerned with what’s in food than what’s not. The top ingredient they are trying to avoid in their foods is sugar.”

The NPD Group, 12/17/15

64.6 Reduced Sodium

There are indications that one of the next big dietary issues 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 mg 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

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.
64.7 Dieting

An assessment by The NPD Group found a long-term decline in dieting among American adults. Nineteen percent (19%) of adults report dieting within the past twelve months, a drop from 31% who did so in 1991. By age, those who have dieted within the past year are as follows:

- 18-to-34: 12%
- 35-to-44: 16%
- 45-to-54: 20%
- 55-to-64: 24%
- 65 and older: 29%

“The dieting among U.S. consumers has been declining over the last decade. Consumers who are on a diet prefer their own diet and are getting creative in defining what aspects of diets work for them and their schedules. Consumers are more interested in lifestyles versus dieting.”

The NPD Group, 1/5/16

Most adults would still like to lose weight, but their approach to losing those extra pounds is to exercise and eat more healthfully. Over half of Americans under the age of 65 say they are exercising strenuously at least once a week; exercise rates are highest among those under 45.

The NPD Group found that consumers are less concerned about calories than they are about other items, like sugar, fat, and sodium. Still, tracking calories is the most popular focus of health-related smartphone apps. About 55% of consumers using these phone apps track caloric intake.

64.8 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.
65

HOLIDAY DINING

65.1 Overview

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.

65.2 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.

65.3 Mother’s Day

According to the National Restaurant Association, Mother’s Day is the most
popular formal occasion to dine out. The association found 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 National Restaurant 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.

65.4 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 than any other occasion, with 43% reportedly doing so. 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:

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2016-2017
• 321 •
• Special menu items: 63%
• Prix fixe menu: 45%
• Celebratory beverages or desserts: 34%
• Flower/candy: 28%
• Entertainment/music: 13%

65.5 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 are 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.

65.6 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.

65.7 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.

65.8 Thanksgiving
According to The NPD Group ([www.npd.com](http://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.

65.9 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.

65.10 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.
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.
66.1 Market Assessment

According to The Licensing Letter, annual retail sales of restaurant-branded licensed merchandise are approximately $4.8 million; the annual growth rate is 3.9%.

66.2 Licensed Food Products

Boston Market

• Boston Market has a licensing agreement with Overhill Farms, which manufactures, distributes, and markets the chain’s line of branded frozen meals. Nation’s Restaurant News reported sales of 30 Boston Market frozen meals 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. Licensed products include a Cinnabon branded bread, cream of wheat, bagels, a bake mix for muffins, Toaster Strudels, cereal, pancake syrup, nuts, popcorn, coffee creamer, and more.

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.
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. Starbucks expanded its lines of licensed products in 2012 with the acquisition of the Teavana retail tea brand for $620 million and the La 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.

**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*.
67

LOCALLY SOURCED & ORGANIC FOOD

67.1 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:

<table>
<thead>
<tr>
<th>Gender</th>
<th>Locally Sourced FSR</th>
<th>Locally Sourced QSR</th>
<th>Organic/Environmentally Friendly FSR</th>
<th>Organic/Environmentally Friendly QSR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female:</td>
<td>69%</td>
<td>65%</td>
<td>47%</td>
<td>50%</td>
</tr>
<tr>
<td>Male:</td>
<td>59%</td>
<td>60%</td>
<td>38%</td>
<td>40%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>Locally Sourced FSR</th>
<th>Locally Sourced QSR</th>
<th>Organic/Environmentally Friendly FSR</th>
<th>Organic/Environmentally Friendly QSR</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-to-34:</td>
<td>58%</td>
<td>58%</td>
<td>46%</td>
<td>48%</td>
</tr>
<tr>
<td>35-to-44:</td>
<td>68%</td>
<td>67%</td>
<td>37%</td>
<td>40%</td>
</tr>
<tr>
<td>45-to-54:</td>
<td>63%</td>
<td>63%</td>
<td>44%</td>
<td>46%</td>
</tr>
<tr>
<td>55-to-64:</td>
<td>67%</td>
<td>64%</td>
<td>44%</td>
<td>45%</td>
</tr>
<tr>
<td>65 and older:</td>
<td>68%</td>
<td>65%</td>
<td>41%</td>
<td>43%</td>
</tr>
</tbody>
</table>

There has been a trend of increased demand for locally sourced foods over organic foods at restaurants, farmers’ markets, and groceries among patrons.

A survey of 1,854 members of the American Culinary Federation (www.acfcchefs.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:

<table>
<thead>
<tr>
<th>Type of Restaurant</th>
<th>Produce</th>
<th>Meat or Seafood</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fine-dining:</td>
<td>87%</td>
<td>75%</td>
</tr>
<tr>
<td>Casual-dining:</td>
<td>63%</td>
<td>55%</td>
</tr>
<tr>
<td>Family-dining:</td>
<td>63%</td>
<td>59%</td>
</tr>
</tbody>
</table>
The Generational Consumer Trend Report, published in 2015 by Technomic (www.technomic.com), reported the percentages of consumers, by generation, that say they are influenced in their decision of which restaurants they visit by the availability of local foods and ingredients as follows:

- Baby Boomers: 53%
- Generation X: 49%
- Millennials: 43%
- Generation Z: 39%

67.2 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.

67.3 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.

67.4 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.

### 67.5 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).
68.1 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.

“For customers, loyalty programs typically offer rewards, such as points toward free food or drink for every dollar spent or based on number of visits. Loyal fans might be given a first look at, or even an exclusive offer of, specials and promotions. For restaurants, loyalty opens the door for collecting data on the buying habits and preferences of frequent visitors as well as for targeted marketing.”

Nation’s Restaurant News, 5/11/15

68.2 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%
A 2015 survey of restaurant owners and managers by LivingSocial (www.livingsocial.com) found that one-third offered a loyalty program. Among that group, more than six-in-10 said loyalty programs were successful to some extent; fewer than three-in-10 said that they were not. One-third agreed that they were somewhat influential.

68.3 Customer Participation

According to a February 2015 report by Colloquy (www.colloquy.com), restaurant loyalty program memberships increased 107% between 2012 and 2014, to 54.8 million members.

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.

A February 2015 survey by AlixPartners (www.alixpartners.com) asked consumers the extent to which loyalty programs influence restaurant selection. Responses were as follows (percentage of respondents):
- Extremely influential: 3%
- Very influential: 9%
- Somewhat influential: 33%
- Slightly influential: 25%
- Not at all influential: 31%

AlixPartners found that 55% didn’t use any restaurant loyalty programs regularly, while 20% used just one. Twelve percent (12%) reported using two loyalty programs for dining frequently; 12% used three.

68.4 Restaurant Loyalty Programs

The following are profiles of select loyalty programs (source: Nation’s Restaurant News):
Dunkin’ Donuts
• Program: DD Perks
• Platform: loyalty card, mobile application
• Perks Offered: five points for every $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 the 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 email or text
• Launch Date: December 2009, with merge of Starbucks and Starbucks Gold into one platform
• No. of Members: estimated 9 million

68.5 Mobile App-Based Loyalty Programs
Burger King, McDonald’s, Pei Wei Asian Diner, Taco Bell, and Wendy’s are among the chains that rolled out mobile loyalty programs in 2015.

Starbucks has been a leader among loyalty app programs with its animated gold-level cup that captures ‘falling stars’ as guests buy more items and allows redemption automatically through the payment part of its app. The app has been in use since 2013.

“Besides driving loyalty, app programs that make it easy for customers to enroll and engage provide the brand with a competitive edge because of the other data they can provide. The restaurant brand can evaluate loyalty program transaction data for segment offers, promotions and other communications to drive frequency, daypart or week-part visits, and encourage more profitable behaviors.”

Jennifer James, Director of Marketing
Kobie Marketing
Nation’s Restaurant News, 10/20/15
NON-TRADITIONAL RESTAURANT SITES

69.1 Pop-Up Restaurants
Pop-up restaurants, often operated by notable chefs and restaurateurs, are restaurants that open for brief time periods in temporary locations. 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. 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.
- La Feria del Mercado de San Miguel, a traveling spinoff of Madrid’s 100-year-old El Mercado de San Miguel, opened at Bayfront Park in Miami from September 2015 through January 2016, the peak months of the tourist season.
- 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.

69.2 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)
69.3 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/10228449836700?sk=wall)
- Europa Car Wash & Cafe (Miami, FL; www.europainmiami.com)
- Organic Bites at Karma Car Wash (Miami, FL; www.facebook.com/karmacarwash)
- The Hub Car Wash & Diner (Colorado Springs, CO; www.hubdiner.com)

69.4 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:
- 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)
- Dancing Crane Cafe at the Bronx Zoo (Bronx, NY; http://bronxzoo.com/visitor-info/dining?gclid=CIHXwtS6wMoCFYMbHwodqb4F_A)
- Gertrude’s at the Baltimore Museum of Art (Baltimore, MD; www.gertrudesbaltimore.com)
- 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)

69.5 Restaurants At Parks and Botanical Gardens
Noted restaurants at parks and botanical gardens include the following:
- 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)
Ahwahnee (Yosemite National Park, CA; www.yosemitepark.com/Dining_AhwahneeDiningRoom.aspx)
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-phipps/cafe-phipps.aspx)
Glass House Cafe at Fairchild Tropical Gardens (Coral Gables, FL; www.fairchildgarden.org/Paul-and-Swanee-DiMare-Science-Village/Glasshouse-Café)
North Pond (Lincoln Park, Chicago, IL; www.northpondrestaurant.com)
Pineapple Room Restaurant at Cheekwood (Nashville, TN; www.cheekwood.org/Visitors/Pineapple_Room_Restaurant.aspx)
Sylvan Lake Lodge Dining (Custer State Park, SD; www.custerresorts.com/sylvan-lake-lodge/dining)
The Loeb Boat House Central Park (Central Park, New York, NY; www.thecentralparkboathouse.com)

69.6 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 Neiman Marcus, Nordstrom, and Saks Fifth Avenue 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 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. 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 Ikea stores 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.
70

RESTRICTIVE DIET MENUS

70.1 Overview
Mintel (www.mintel.com) estimates that 100 million Americans have a food intolerance of some type.

70.2 Gluten-Free Menu Items
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. Gluten-free cuisine ranked in the top five trends in 2015. Mintel estimates sales of gluten-free foods and beverages (both packaged and served in restaurants) at $15.6 billion in 2016, an increase from $10.5 billion in 2010.

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%

According to the Celiac Disease Foundation (https://celiac.org), fewer than 7% of people in the U.S. are sensitive to gluten; about 1% percent of people suffer from celiac disease, an autoimmune condition in which gluten consumption can cause life-threatening intestinal damage. An estimated 5% of restaurant visits are by guests with gluten issues.

Despite the relatively low percentages directly affected by gluten, a much larger percentage see benefits in a gluten-free diet. Sixty-three percent (63%) of adults surveyed by Consumer Reports said they believed following a gluten-free diet would improve their physical or mental health, and about a third of them said they buy gluten-free products or try to avoid gluten.

_________________________________________________________________
“Restaurants are responding with a growing array of gluten-free options.”

Nation’s Restaurant News, 3/20/15
_________________________________________________________________
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.

“\textit{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

\textbf{70.3 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 \textit{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 (www.mintel.com), 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 modern and upscale kosher restaurants across the U.S. Shaya (New Orleans, LA), named restaurant-of-the-year in 2015 by Esquire, is one example. Other examples include Abe Fisher’s (Philadelphia, PA), Dizengoff (Philadelphia, PA), General Muir (Atlanta, GA), Restaurant 27 (Miami, FL), Russ & Daughters (New York, NY), Sadelle’s (New York, NY), and Zak the Baker (Miami, FL).

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 advise.

70.4 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., offer meals meeting Islamic dietary standards.

70.5 Vegetarian Cuisine

A survey by the National Restaurant Association found that 20% of consumers 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.
SNACKING

71.1 Overview

The National Restaurant Association (www.restaurant.org) assesses that snack shop and nonalcoholic beverage bar sales are $32.8 billion in 2015, a 5.2% increase over 2014. Coffeeshops (see Chapter 27) account for almost half of the total.

Eight (8) snack chains (excluding coffeeshops) ranked among Nation’s Restaurant News’ list of 200 largest U.S. restaurant chains in 2015: 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 $10.2 billion; they operated 14,745 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.

Snack occasions – morning, afternoon, and evening – account for 18% of total industry traffic, or about 11 billion visits each year, according to The NPD Group.

71.2 Restaurant Snacks

According to Snacking Occasion Consumer Trend Report, by Technomic (www.technomic.com), 51% of consumers say they snack at least twice a day; 31% say their snacking has increased over the past two years.

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.

71.3 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.

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.

The growth in single-person households in the U.S. is influencing the increase in snacking. The NPD Group reports that solo diners snack on 191 occasions annually, an increase from 167 occasions in 2011. Similar to larger households, health and weight management is among the key motivations to eat snack foods as meals for solo diners, particularly better-for-you snack foods.

“Smaller household sizes and eating alone are among the growing factors with snacking.”

Darren Seifer, Analyst
The NPD Group, 8/11/15
71.4 Snacking Throughout The Day

*Snacking In America*, an October 2015 report by The NPD Group, reported snacking throughout the day as shown in Figure 71.1.

A third of snack/appetizer items consumed for or instead of lunch or dinner are from the savory snack category. Over a third of snacks consumed after dinner are sweet, and over 40% of snacks carried from home and eaten at school, work, in the car, or at other locations are better-for-you.

Snacking behaviors also vary seasonally. Driven by Halloween treats, sweet snack consumption spikes in November. Better-for-you snacking decreases in November and December, and savory snacking hits its peak in December and January.

![Figure 71.1. Consumption of snack food throughout the day.](source: The NPD Group)
72

SUSTAINABILITY

72.1 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. Environmental sustainability has been among the top three trends since 2013 and ranked as the top culinary theme in 2015.

In a 2015 survey by Technomic (www.technomic.com), 63% of consumers said they are more likely to visit a restaurant they view as socially conscious.

“Safeguarding natural resources is a growing concern across the globe. Consumers are growing more concerned about how what they eat affects the planet and American chefs cited environmental sustainability as the No. 1 culinary issue they face this year.”

Nation’s Restaurant News, 3/20/15

72.2 Conserve Program
Launched in 2008, the National Restaurant Association’s Conserve program (http://conserve.restaurant.org) is a broad initiative that helps restaurateurs implement conservation practices. Partnering with Energy Star (www.energystar.gov), Food Service Technology Center (www.fishnick.com), Food Waste Reduction Alliance (www.foodwastealliance.org), Foodservice Packaging Institute (www.fpi.org), U.S. Composting Council (http://compostingcouncil.org), and other organizations, Conserve offers practical tips and guidelines for restaurants to maximize their sustainability efforts in their everyday operations.
72.3 Climate Change Initiative

President Barack Obama launched the American Business Act on Climate Pledge in October 2015. By invitation, 81 major U.S. corporations became inaugural participants, pledging to curb greenhouse gas emissions and invest in clean energy. Collectively, companies backing the program have a $5 trillion market capitalization, account for $3 trillion in annual revenue, and employ nine million people.

Two companies in the restaurant sector, McDonald’s and Starbucks, were among the inaugural members of the pledge initiative.

McDonald’s pledge includes a program to buy a portion of beef from verified, sustainable sources beginning in 2016. The company is a founding member of the Global Roundtable for Sustainable Beef (www.grsbeef.org), which is working on criteria for sustainable beef production. McDonald’s is also setting targets for ensuring that its supply of packaging, palm oil, coffee, and other products are ‘deforestation free,’ meaning the suppliers do not impact rainforests. The company has set a goal to use all fiber-based packaging, as well as sustainable palm oil and coffee, by 2020. McDonald’s has also committed to increase energy efficiency 20% and increase recycling 50% by 2020.

Starbucks plans to build all of its new locations to achieve LEED certification and to reduce energy and water consumption by 25%. It also plans to purchase renewable energy equal to 100 percent of the electricity used in its stores and source all of its coffee through sources that meet certain ethical guidelines.
73

TAKEOUT & DELIVERY

73.1 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 approximately 70% of quick-service restaurant sales and 10% sales at full-service restaurants.

The Generational Consumer Trend Report, published in 2015 by Technomic (www.technomic.com), assesses the distribution, by generation, of all food ordered at restaurants as follows:

<table>
<thead>
<tr>
<th>Generation</th>
<th>Dine-In</th>
<th>Takeout</th>
<th>Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baby Boomers</td>
<td>52%</td>
<td>37%</td>
<td>11%</td>
</tr>
<tr>
<td>Generation X</td>
<td>46%</td>
<td>39%</td>
<td>15%</td>
</tr>
<tr>
<td>Millennials</td>
<td>44%</td>
<td>36%</td>
<td>19%</td>
</tr>
<tr>
<td>Generation Z</td>
<td>44%</td>
<td>40%</td>
<td>16%</td>
</tr>
</tbody>
</table>

73.2 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:

<table>
<thead>
<tr>
<th></th>
<th>All Adults</th>
<th>Frequent Customers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>FSR</td>
</tr>
<tr>
<td>Delivery from a FSR</td>
<td>55%</td>
<td>58%</td>
</tr>
<tr>
<td>Delivery from a QSR</td>
<td>52%</td>
<td>54%</td>
</tr>
<tr>
<td>Takeout from a FSR</td>
<td>51%</td>
<td>53%</td>
</tr>
</tbody>
</table>

73.3 The Takeout and Delivery Customer

According to Technomic, 57% of consumers purchase takeout once a week or
Consumers use takeout and delivery monthly, by age demographic, as follows (number of meal occasions):

<table>
<thead>
<tr>
<th>Age Demographic</th>
<th>1 or 2</th>
<th>3 to 9</th>
<th>10 or more</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-to-24</td>
<td>10%</td>
<td>49%</td>
<td>42%</td>
</tr>
<tr>
<td>25-to-34</td>
<td>26%</td>
<td>47%</td>
<td>27%</td>
</tr>
<tr>
<td>35-to-44</td>
<td>28%</td>
<td>52%</td>
<td>20%</td>
</tr>
<tr>
<td>45 and older</td>
<td>29%</td>
<td>52%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Consumers’ preferences in takeout and delivery are as follows (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.

### 73.4 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 each year, 71% are pizza deliveries.

Seventy percent (70%) of Domino’s business is delivery; the chain’s annual sales are $4.11 billion. Many small independent pizza restaurants, however, do not offer delivery services.

### 73.5 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.

**73.6 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.

**73.7 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%
PART X: DINING & THE INTERNET
CONSUMER USE OF THE INTERNET & MOBILE FOR DINING

74.1 Dining Activities Via Mobile Devices

According to the 2015 Restaurant Industry Forecast, by the National Restaurant Association (www.restaurant.org), the following percentages of adults use smartphones or tablets for various dining-related activities at least once a month:

<table>
<thead>
<tr>
<th>Activity</th>
<th>All Adults</th>
<th>18-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>View a restaurant’s menu:</td>
<td>31%</td>
<td>31%</td>
<td>30%</td>
<td>36%</td>
<td>29%</td>
<td>22%</td>
</tr>
<tr>
<td>Locations, directions or hours:</td>
<td>28%</td>
<td>29%</td>
<td>26%</td>
<td>30%</td>
<td>27%</td>
<td>28%</td>
</tr>
<tr>
<td>Order from website or app:</td>
<td>27%</td>
<td>30%</td>
<td>29%</td>
<td>31%</td>
<td>18%</td>
<td>19%</td>
</tr>
<tr>
<td>Read online reviews:</td>
<td>23%</td>
<td>27%</td>
<td>22%</td>
<td>25%</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>Rewards/special deals:</td>
<td>23%</td>
<td>23%</td>
<td>22%</td>
<td>28%</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>Make reservations:</td>
<td>18%</td>
<td>19%</td>
<td>20%</td>
<td>22%</td>
<td>16%</td>
<td>11%</td>
</tr>
<tr>
<td>Nutrition information:</td>
<td>16%</td>
<td>18%</td>
<td>16%</td>
<td>16%</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>Pay for a meal:</td>
<td>11%</td>
<td>15%</td>
<td>13%</td>
<td>9%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Order from aggregate website/app</td>
<td>9%</td>
<td>13%</td>
<td>6%</td>
<td>9%</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

74.2 Restaurant Technology

According to the National Restaurant Association, the percentages of restaurant operators offering various technology options are as follows:

<table>
<thead>
<tr>
<th>Technology</th>
<th>Family-Dining</th>
<th>Casual-Dining</th>
<th>Fine-Dining</th>
<th>Quick-Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wi-Fi for customers:</td>
<td>63%</td>
<td>67%</td>
<td>74%</td>
<td>60%</td>
</tr>
<tr>
<td>Mobile-enabled website:</td>
<td>47%</td>
<td>60%</td>
<td>54%</td>
<td>63%</td>
</tr>
<tr>
<td>Nutrition info online or via app:</td>
<td>45%</td>
<td>35%</td>
<td>19%</td>
<td>74%</td>
</tr>
<tr>
<td>Rewards-deals via app:</td>
<td>41%</td>
<td>32%</td>
<td>19%</td>
<td>47%</td>
</tr>
<tr>
<td>Takeout/delivery ordering via own branded website/app</td>
<td>35%</td>
<td>41%</td>
<td>24%</td>
<td>38%</td>
</tr>
<tr>
<td>Takeout/delivery ordering via aggregate service:</td>
<td>31%</td>
<td>30%</td>
<td>19%</td>
<td>28%</td>
</tr>
<tr>
<td>Menu on iPad/tablet:</td>
<td>18%</td>
<td>21%</td>
<td>11%</td>
<td>n/a</td>
</tr>
<tr>
<td>Reservations online or via app:</td>
<td>16%</td>
<td>19%</td>
<td>59%</td>
<td>n/a</td>
</tr>
<tr>
<td>Electronic ordering at table:</td>
<td>8%</td>
<td>7%</td>
<td>4%</td>
<td>n/a</td>
</tr>
<tr>
<td>Electronic menu board:</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>27%</td>
</tr>
<tr>
<td>Customer ordering kiosks:</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>18%</td>
</tr>
</tbody>
</table>
74.3 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 $199 monthly, plus a $1 fee for each reservation. Diners who make reservations do not pay a fee.

74.4 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.

“One extra star on a restaurant’s Yelp rating boosts revenue 5% to 9%, according to Michael Luna of Harvard Business School.”

The Economist, 10/24/15

74.5 Social Networking

When asked about their social media activities in a survey by the National Restaurant Association, restaurant operators responded as follows:

<table>
<thead>
<tr>
<th>Restaurant Type</th>
<th>Very Active</th>
<th>Somewhat Active</th>
<th>Not Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family-dining</td>
<td>32%</td>
<td>48%</td>
<td>20%</td>
</tr>
<tr>
<td>Casual-dining</td>
<td>34%</td>
<td>55%</td>
<td>11%</td>
</tr>
<tr>
<td>Fine-dining</td>
<td>40%</td>
<td>43%</td>
<td>16%</td>
</tr>
<tr>
<td>Quick-service</td>
<td>39%</td>
<td>42%</td>
<td>17%</td>
</tr>
<tr>
<td>Fast-casual</td>
<td>29%</td>
<td>51%</td>
<td>19%</td>
</tr>
</tbody>
</table>
75.1 Overview

According to the 2015 Restaurant Industry Forecast, by the National Restaurant Association (www.restaurant.org), the percentages of restaurant operators offering ordering and payment technology are as follows:

**Takeout/Delivery Ordering Via Own Branded Website or App**
- Casual-dining: 41%
- Family-dining: 35%
- Fast-casual: 47%
- Fine-dining: 24%
- Quick-service: 38%

**Mobile or Wireless Payment Options Like PayPal, Apple Pay, or Square**
- Casual-dining: 11%
- Family-dining: 14%
- Fast-casual: 15%
- Fine-dining: 11%
- Quick-service: 35%

75.2 Mobile Ordering

Ordering via smartphone was introduced by a few limited service chains in 2013. By year-end 2015, most major chains had their own apps for ordering, some with a branded payment option.

In a survey by Sullivan, Higdon & Sink (www.wehatesheep.com), customers said benefits of ordering from restaurants online or via app were as follows:
- Don’t have to wait; order is ready: 71%
- Easier to order: 68%
- Order accuracy: 68%
- Can easily reorder favorite items: 61%
- Can prepay with credit card: 56%

The apps have been immensely popular. Taco Bell, for example, reported that its Live Más app, available for its 6,000 U.S. restaurants, had been downloaded more than 3 million times.
Taco Bell found that customers using Live Más spend about 20% more than those who order in person.

A report by the National Restaurant Association confirmed that mobile apps tend to increase spending among customers ages 18-to-34.

75.3 Mobile Payment

*Technology and Dining Out In 2015,* by OpenTable (www.opentable.com), reported use and attitudes about using mobile devices for restaurant payment as follows:
- Tried it, like it: 7%
- Tried it, neutral: 4%
- Tried it, disliked it: 2%
- Haven’t tried, like the idea: 46%
- Haven’t tried, neutral: 25%
- Haven’t tried, dislike the idea: 16%

While only about 13% of adults have used mobile payment in restaurants, the fact that over one-half of those who have not used the technology like the concept suggests increasing use in the future.

“Mobile payment technology is growing fast as a must-have in the restaurant business, alongside customer demand for speed, convenience, and a willingness to use the technology. While many operators rely on third-party services, some have chosen to develop proprietary smartphone apps in-house.”

*Nation’s Restaurant News, 3/23/15*
76.1 Overview
Consumers have long been torn between the quality of restaurant meals and the convenience of dining at home. A host of startups are providing the best of both worlds, offering on-demand meal delivery that are ordered via smartphone apps. They have developed restaurant delivery services using a model similar to that developed by Uber and Lyft to revolutionize the taxi industry. A few of the startups have taken the concept one step further, preparing meals in their own kitchens as well as delivering them.

“Delivery was the buzzword of the year in 2015 as an increasing number of restaurant chains attempted to find their way in the growing crowd of third-party players pitching on-demand service. Tech-driven delivery providers have moved rapidly into new markets across the country. Restaurant operators, meanwhile, have struggled to keep up and find the best solutions for their brands.”

Nation’s Restaurant News, 12/14/15

According to the 2015 Restaurant Industry Forecast, by the National Restaurant Association (www.restaurant.org), the percentages of restaurant operators offering delivery service via a third-party aggregator service are as follows:

- Casual-dining: 30%
- Family-dining: 31%
- Fast-casual: 32%
- Fine-dining: 19%
- Quick-service: 28%
76.2 Restaurant Delivery

App-based technology has sparked a proliferation of third-party services that connect diners with their restaurant meals.

“As consumers increasingly look for dining on demand, a rapidly changing landscape of third-party delivery providers is jockeying to tap the growing $70 billion takeout and delivery business. Technology is driving this. Pressure on restaurants to deliver is only expected to increase.”

Nation’s Restaurant News, 5/25/15

The following are key players in the restaurant meal delivery business:

**Caviar** (www.trycaviar.com)
- Caviar partners with independent restaurants for meal delivery. Customers order on the web or from the Caviar app for iOS and Android.
- At year-end 2015, Caviar provided delivery services in Atlanta, Brooklyn, Boston, Chicago, Dallas, Manhattan, Miami, Minneapolis, Los Angeles, Philadelphia, Sacramento, San Francisco Bay Area (including East Bay & South Bay), Seattle, Portland, and Washington, DC.
- Caviar was acquired by Square in 2014.

**DoorDash** (www.doordash.com)
- DoorDash is an on-demand delivery service that connects customers with local restaurants and retail businesses. The core of the business is logistics technology for on-demand delivery. People can purchase meals or goods from local merchants and have them delivered in less than 45 minutes.
- The company was founded by students at Stanford University in 2013. Services were available in 52 cities at year-end 2015. In 2016, DoorDash plans to reach 120 cities, including 20 major metropolitan areas.

**GrubHub/Seamless** (www.grubhub.com)
- GrubHub, the largest online and mobile food ordering company in the U.S., allows diners to order directly from approximately 35,000 takeout restaurants in more than 900 U.S. cities via its online and mobile ordering platforms.
• In 2013, GrubHub, which was founded in 2004, merged with Seamless, another major delivery service founded in 1999. GrubHub’s portfolio of brands also includes MenuPages, Allmenus, Restaurants on the Run, DiningIn, and Delivered Dish.
• More than 50% of GrubHub and Seamless orders are placed through mobile devices.
• In 2015, GrubHub sent nearly $2 billion in gross food sales to local takeout restaurants. The company has served approximately 6.4 million customers, and it processes an average of 220,000 daily orders.

Order Up (www.orderup.com)
• Founded in 2009 in Baltimore, Order Up provided restaurant meal delivery services in 35 cities at year-end 2015. The company focuses on medium-size metro areas like Charlottesville, Virginia; Denver, Colorado; and Santa Barbara, California.

Postmates (www.postmates.com)
• Postmates, a logistics company, is closely compared to Uber because of its use of mobile phones to receive orders and dispatch delivery drivers.
• The company offered delivery services in more than 100 metropolitan areas.
• In 2015, Postmates secured delivery deals with Chipotle, McDonald’s, and Starbucks.

UberEats (www.ubereats.com)
• UberEATS partners with local restaurants to provide users on-demand meals from the same Uber app they use to get a ride. Delivery time is 10 minutes or less.
• The service launched in Santa Monica, California, in August 2014. The service expanded in 2015 to Atlanta, Austin, Chicago, New York City, San Francisco, and Washington, DC.
• Payment is the same as the car service which uses a cashless, automated payment system, charging the credit card that users have on file directly from the mobile device.

76.3 Meal Delivery
A few app-based startups that both prepare and deliver meals launched in Silicon Valley in 2014 and 2015. Four of the companies have achieved a high profile in the media as recipients of a combined $200 million in venture capital funding.
“A handful of online food companies in San Francisco ... are doing more than facilitating takeout orders. These restaurants in the cloud operate their own kitchens and employ professional cooks to make meals that customers order via mobile apps. The startups trumpet delivery times of 30 minutes or less.”

Bloomberg Businessweek, 10/27/15

The following are key players in the meal preparation and delivery business:

Blue Apron (www.blueapron.com)
- Blue Apron offers meal delivery with ingredients perfectly portioned and recipes, with prices starting around $60 a week. The key selling point is reducing food waste: Everything subscribers receive is pre-measured to the precise proportions the recipe requires. Subscribers sign up online and schedule (or skip) their deliveries weeks in advance based on their interest in the pre-planned menus.
- Founded in 2012, Blue Apron closed a $135 million investment round from Fidelity Management in June 2015, putting its valuation at about $2 billion.
- In October 2015, Blue Apron reported delivering five million meals a month, up from 500,000 just 18 months prior.

Munchery (www.munchery.com)
- Munchery coordinates a conglomeration of chefs who offer continually changing menus to customers. Chefs develop their dishes and source ingredients; users rate the meals. Meals are precooked, chilled to maintain freshness, and generally microwavable. Meals can be ordered up to 6 p.m. the same day, or a few days in advance. A fleet of drivers delivers the dinners within a one-hour window.
- In May 2015 the company raised $85 million in venture capital in funding.
- At year-end 2015, Munchery had operations in San Francisco, Los Angeles, New York City, and Seattle.

Sprig (www.sprig.com)
- Launched in San Francisco and Palo Alto in 2013, Sprig employs professional chefs and touts organic and sustainably raised ingredients in its menu items. Emphasis is on dishes that not only taste good but maintain their quality through the delivery process.
- Sprig lunch entrées cost $9; dinners are $12.
• The company expanded to Chicago in 2015.

**Spoonrocket** ([www.spoonrocket.com](http://www.spoonrocket.com))

• Spoonrocket offers healthy meals and fast delivery, typically 15 minutes or less. The company seeks to achieve a competitive advantage with affordable meals, at about $8 per dish.

• Spoonrocket was operating in San Francisco, San Diego, and Seattle at year-end 2015.

The meal preparation-delivery concept has, thus far, only proven successful in the San Francisco bay area.

_________________________________________________________________

“Whether there’s an appetite for elite conveniences like these outside Silicon Valley remains to be seen. The food startups, which are not well established away from the West Coast, have yet to prove that their high-cost, logistics-intensive operations can be effective across many different cities.”

*Time*, 5/18/15

_________________________________________________________________
77

SOCIAL MEDIA

77.1 Overview

*Nation’s Restaurant News*, in conjunction with Sprinklr (www.sprinklr.com), a social media analytics company, rank the social media activities of the nation’s largest restaurant chains with the NRN Social 200 Index.

The NRN Social 200 Index monitors restaurant brand efforts and customer engagement on the three largest social media platforms: Facebook, Twitter, and YouTube. The index is updated daily, providing a near real-time look at social media activity in the restaurant industry.

77.2 NRN Social 200

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Followers</th>
<th>Index</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>7-Eleven</td>
<td>18.8 million</td>
<td>796</td>
<td>11</td>
</tr>
<tr>
<td>A&amp;W Restaurants</td>
<td>380,800</td>
<td>701</td>
<td>36</td>
</tr>
<tr>
<td>Applebee’s</td>
<td>9.1 million</td>
<td>658</td>
<td>52</td>
</tr>
<tr>
<td>Arby’s</td>
<td>3.6 million</td>
<td>625</td>
<td>66</td>
</tr>
<tr>
<td>Au Bon Pain</td>
<td>194,700</td>
<td>458</td>
<td>112</td>
</tr>
<tr>
<td>Auntie Anne's</td>
<td>1.2 million</td>
<td>790</td>
<td>13</td>
</tr>
<tr>
<td>Bahama Breeze</td>
<td>434,700</td>
<td>405</td>
<td>126</td>
</tr>
<tr>
<td>Baja Fresh</td>
<td>145,700</td>
<td>238</td>
<td>180</td>
</tr>
<tr>
<td>Bar Louie</td>
<td>115,300</td>
<td>428</td>
<td>120</td>
</tr>
<tr>
<td>Baskin-Robbins</td>
<td>8.7 million</td>
<td>818</td>
<td>9</td>
</tr>
<tr>
<td>Beef O’Brady’s</td>
<td>138,400</td>
<td>335</td>
<td>153</td>
</tr>
<tr>
<td>Benihana</td>
<td>400,200</td>
<td>367</td>
<td>144</td>
</tr>
<tr>
<td>Bertucci’s</td>
<td>57,600</td>
<td>228</td>
<td>183</td>
</tr>
<tr>
<td>Big Boy</td>
<td>20,800</td>
<td>384</td>
<td>138</td>
</tr>
<tr>
<td>BJ’s Restaurants</td>
<td>892,500</td>
<td>236</td>
<td>181</td>
</tr>
<tr>
<td>Black Angus Steakhouse</td>
<td>37,500</td>
<td>175</td>
<td>195</td>
</tr>
<tr>
<td>Bob Evans</td>
<td>443,200</td>
<td>658</td>
<td>53</td>
</tr>
<tr>
<td>Bojangles’</td>
<td>467,000</td>
<td>484</td>
<td>105</td>
</tr>
<tr>
<td>Bonefish Grill</td>
<td>600,000</td>
<td>364</td>
<td>147</td>
</tr>
<tr>
<td>Boston Market</td>
<td>183,400</td>
<td>476</td>
<td>108</td>
</tr>
<tr>
<td>Braum’s Ice Cream and Dairy Store</td>
<td>10,900</td>
<td>180</td>
<td>193</td>
</tr>
<tr>
<td>Restaurant Name</td>
<td>Annual Sales</td>
<td>Employees</td>
<td>Competitors</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>--------------</td>
<td>-----------</td>
<td>-------------</td>
</tr>
<tr>
<td>Bravo Cucina Italiana</td>
<td>21,000</td>
<td>771</td>
<td>15</td>
</tr>
<tr>
<td>Brio Tuscan</td>
<td>139,500</td>
<td>741</td>
<td>26</td>
</tr>
<tr>
<td>Bruegger's Bagels</td>
<td>309,700</td>
<td>200</td>
<td>188</td>
</tr>
<tr>
<td>Bubba Gump Shrimp Co.</td>
<td>195,000</td>
<td>618</td>
<td>69</td>
</tr>
<tr>
<td>Buca di Beppo</td>
<td>485,000</td>
<td>375</td>
<td>145</td>
</tr>
<tr>
<td>Buffalo Wild Wings</td>
<td>13.2 million</td>
<td>401</td>
<td>129</td>
</tr>
<tr>
<td>Burger King</td>
<td>28.4 million</td>
<td>868</td>
<td>2</td>
</tr>
<tr>
<td>California Pizza Kitchen</td>
<td>1.1 million</td>
<td>439</td>
<td>118</td>
</tr>
<tr>
<td>Captain D's</td>
<td>354,100</td>
<td>182</td>
<td>192</td>
</tr>
<tr>
<td>Caribou Coffee</td>
<td>661,100</td>
<td>515</td>
<td>98</td>
</tr>
<tr>
<td>Carino's Italian</td>
<td>64,800</td>
<td>322</td>
<td>157</td>
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<tr>
<td>Carl's Jr.</td>
<td>2.5 million</td>
<td>608</td>
<td>72</td>
</tr>
<tr>
<td>Carrabba's Italian Grill</td>
<td>390,900</td>
<td>550</td>
<td>89</td>
</tr>
<tr>
<td>Casey's General Store</td>
<td>309,500</td>
<td>626</td>
<td>65</td>
</tr>
<tr>
<td>Champs</td>
<td>88,300</td>
<td>261</td>
<td>177</td>
</tr>
<tr>
<td>Charley's Grilled Subs</td>
<td>5,400</td>
<td>129</td>
<td>199</td>
</tr>
<tr>
<td>Checkers</td>
<td>296,000</td>
<td>383</td>
<td>140</td>
</tr>
<tr>
<td>Cheddar's</td>
<td>158,500</td>
<td>143</td>
<td>197</td>
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<tr>
<td>Chevys Fresh Mex</td>
<td>183,600</td>
<td>752</td>
<td>19</td>
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<tr>
<td>Chick-fil-A</td>
<td>10.4 million</td>
<td>589</td>
<td>80</td>
</tr>
<tr>
<td>Chili's Grill &amp; Bar</td>
<td>6.1 million</td>
<td>552</td>
<td>88</td>
</tr>
<tr>
<td>Chipotle</td>
<td>4.4 million</td>
<td>639</td>
<td>61</td>
</tr>
<tr>
<td>Chuck E. Cheese's</td>
<td>1.5 million</td>
<td>518</td>
<td>96</td>
</tr>
<tr>
<td>Church's Chicken</td>
<td>1.2 million</td>
<td>678</td>
<td>42</td>
</tr>
<tr>
<td>Chuy's</td>
<td>168,300</td>
<td>386</td>
<td>137</td>
</tr>
<tr>
<td>CiCi's Pizza</td>
<td>1.2 million</td>
<td>220</td>
<td>186</td>
</tr>
<tr>
<td>Circle K</td>
<td>1.1 million</td>
<td>669</td>
<td>46</td>
</tr>
<tr>
<td>Claim Jumper Restaurants</td>
<td>144,700</td>
<td>279</td>
<td>174</td>
</tr>
<tr>
<td>Coco's</td>
<td>20,100</td>
<td>186</td>
<td>189</td>
</tr>
<tr>
<td>Cold Stone Creamery</td>
<td>3.3 million</td>
<td>650</td>
<td>56</td>
</tr>
<tr>
<td>Corner Bakery Cafe</td>
<td>213,200</td>
<td>527</td>
<td>91</td>
</tr>
<tr>
<td>Cosi</td>
<td>41,900</td>
<td>296</td>
<td>168</td>
</tr>
<tr>
<td>Costco</td>
<td>3.0 million</td>
<td>619</td>
<td>68</td>
</tr>
<tr>
<td>Cracker Barrel Old Country Store</td>
<td>2.9 million</td>
<td>795</td>
<td>12</td>
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<td>Culver's</td>
<td>1.9 million</td>
<td>830</td>
<td>3</td>
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<tr>
<td>Dairy Queen</td>
<td>11.0 million</td>
<td>645</td>
<td>59</td>
</tr>
<tr>
<td>Dave &amp; Buster's</td>
<td>719,000</td>
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<td>160</td>
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<td>Del Frisco's</td>
<td>16,800</td>
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<td>150</td>
</tr>
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<td>Del Taco</td>
<td>626,000</td>
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<td>Denny's</td>
<td>1.7 million</td>
<td>674</td>
<td>43</td>
</tr>
<tr>
<td>Dickey's Barbecue Pit</td>
<td>159,000</td>
<td>674</td>
<td>44</td>
</tr>
<tr>
<td>Domino's</td>
<td>31.9 million</td>
<td>745</td>
<td>21</td>
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<tr>
<td>Donatos Pizzeria</td>
<td>76,800</td>
<td>480</td>
<td>106</td>
</tr>
<tr>
<td>Dunkin Donuts</td>
<td>15.7 million</td>
<td>710</td>
<td>34</td>
</tr>
<tr>
<td>Restaurant</td>
<td>Sales (in millions)</td>
<td>Employees</td>
<td>Market Share</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>---------------------</td>
<td>-----------</td>
<td>--------------</td>
</tr>
<tr>
<td>Eat ‘n Park:</td>
<td>94,300</td>
<td>582</td>
<td>84</td>
</tr>
<tr>
<td>Einstein Bros. Bagels:</td>
<td>769,700</td>
<td>222</td>
<td>185</td>
</tr>
<tr>
<td>El Pollo Loco:</td>
<td>633,800</td>
<td>585</td>
<td>83</td>
</tr>
<tr>
<td>Elephant Bar:</td>
<td>41,400</td>
<td>170</td>
<td>196</td>
</tr>
<tr>
<td>Famous Dave’s:</td>
<td>454,700</td>
<td>352</td>
<td>151</td>
</tr>
<tr>
<td>Fazoli’s:</td>
<td>172,200</td>
<td>310</td>
<td>164</td>
</tr>
<tr>
<td>Firehouse Subs:</td>
<td>1.5 million</td>
<td>611</td>
<td>71</td>
</tr>
<tr>
<td>Five Guys Burgers &amp; Fries:</td>
<td>1.1 million</td>
<td>391</td>
<td>133</td>
</tr>
<tr>
<td>Fleming’s Prime Steakhouse &amp; Wine Bar:</td>
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<td>Restaurant</td>
<td>Revenue (USD)</td>
<td>YOY (%)</td>
<td>Sales Growth</td>
</tr>
<tr>
<td>------------------------------------------------</td>
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<td>Perkins Restaurant and Bakery:</td>
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<td>63</td>
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<td>Restaurant/food &amp; beverage</td>
<td>Total</td>
<td>Employees</td>
<td>Weekly Hours</td>
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<td>178</td>
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<td>Sbarro:</td>
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<td>Sheetz:</td>
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<td>194</td>
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<td>Smashburger:</td>
<td>182,000</td>
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<td>146</td>
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<td>Smokey Bones:</td>
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<td>200</td>
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<td>37</td>
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<td>79</td>
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<td>The Melting Pot:</td>
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<td>50</td>
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<td>Uno Chicago Grill:</td>
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<td>399</td>
<td>130</td>
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<td>Village Inn:</td>
<td>61,000</td>
<td>553</td>
<td>87</td>
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<td>Waffle House:</td>
<td>814,100</td>
<td>497</td>
<td>101</td>
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<td>731</td>
<td>27</td>
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<td>714</td>
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<td>76</td>
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<tr>
<td>Wienerschnitzel:</td>
<td>334,100</td>
<td>616</td>
<td>70</td>
</tr>
</tbody>
</table>
• Wingstop: 2.1 million 695 38
• Yard House: 279,900 741 25
• Zaxby’s: 1.3 million 321 158

77.3 Market Resources
Nation’s Restaurant News, 1166 Avenue of the Americas, 10th Floor, New York, NY 10036. (212) 204-4200. (www.nrn.com)

Sprinklr, 29 West 35th Street, 8th Floor, New York, NY 10001. (917) 933-7800. (www.sprinklr.com)

The NRN Social 200 is described and data is presented at http://nrn.com/industry-data/social-media-200.
78

SOCIAL NETWORKING

78.1 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.

DigitalCoCo ranks restaurants using the Restaurant Social Media Index (RSMI,
http://rsmindex.com). The RSMI scores each restaurant brand on a 1-to-100 scale in
five areas: engagement, influence, location-based actions, mobile engagement, and
influence. The five scores are added to compute the RSMI.

78.2 Restaurant Social Media Index
In 2015, the following restaurant brands had the highest RSMI:

- Chick-fil-A: 449.09
- Sonic Drive-in: 446.74
- Chipotle: 446.11
- Panera Bread: 444.86
- Wendy’s: 439.27
- Taco Bell: 438.79
• Buffalo Wild Wings: 430.69
• Firehouse Subs: 430.41
• Shake Shack: 429.28
• In-N-Out Burger: 425.98
• Starbucks: 422.02
• Tender Greens: 419.54
• Raising Cane’s: 417.56
• Five Guys Burgers and Fries: 411.85
• McAlister’s Deli: 410.23
• Dunkin’ Donuts: 409.29
• Noodles & Company: 402.65
• Rubio’s Fresh Mexican Grill: 400.92
• Modmarket: 399.53
• Jason’s Deli: 395.76
• Pizza Hut: 391.77
• Veggie Grill: 390.83
• Peet’s Coffee & Tea: 382.96
• Pinkberry: 381.49
• Habit Burger Grill: 381.19

78.3 Market Resources
DigitalCoCo, 330 SW 2nd Street, Suite 103, Ft. Lauderdale, FL 33301. (954) 416-3028. (www.digitalcoco.com)
PART XI: BEVERAGE TRENDS & ANALYSES
79.1 Beverage Consumption

The average person consumes 165.0 gallons of beverages annually. Consumption by beverage category is as follows:

- Carbonated soft drinks: 39.0 gallons
- Bottled water: 33.2 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.

79.2 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. Spending for alcoholic beverages is approximately $200 billion; about $100 billion is spent on non-alcoholic beverages.

79.3 Alcoholic Beverages

According to the Distilled Spirits Council (DISCUS, www.discus.org), alcoholic beverage supplier gross revenue in 2014 was $66.4 billion, distributed as follows:

- Beer: $32.1 billion
- Spirits: $23.1 billion
- Wine: $11.3 billion

DISCUS estimates retail sales of alcoholic beverages at $200 billion.
According to The Beverage Information Group (www.beveragenet.net), annual on-premise alcoholic beverage sales are approximately $110 billion.

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:

<table>
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<th>Year</th>
<th>Drink</th>
<th>Total Abstainer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1939</td>
<td>58%</td>
<td>42%</td>
</tr>
<tr>
<td>1949</td>
<td>58%</td>
<td>42%</td>
</tr>
<tr>
<td>1959</td>
<td>61%</td>
<td>39%</td>
</tr>
<tr>
<td>1969</td>
<td>64%</td>
<td>36%</td>
</tr>
<tr>
<td>1979</td>
<td>69%</td>
<td>31%</td>
</tr>
<tr>
<td>1989</td>
<td>62%-56%*</td>
<td>38%-44%*</td>
</tr>
<tr>
<td>1999</td>
<td>64%</td>
<td>36%</td>
</tr>
<tr>
<td>2000</td>
<td>64%</td>
<td>36%</td>
</tr>
<tr>
<td>2001</td>
<td>62%</td>
<td>38%</td>
</tr>
<tr>
<td>2002</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>2003</td>
<td>62%</td>
<td>38%</td>
</tr>
<tr>
<td>2004</td>
<td>62%</td>
<td>38%</td>
</tr>
<tr>
<td>2005</td>
<td>63%</td>
<td>37%</td>
</tr>
<tr>
<td>2006</td>
<td>64%</td>
<td>36%</td>
</tr>
<tr>
<td>2007</td>
<td>64%</td>
<td>36%</td>
</tr>
<tr>
<td>2008</td>
<td>62%</td>
<td>38%</td>
</tr>
<tr>
<td>2009</td>
<td>64%</td>
<td>36%</td>
</tr>
<tr>
<td>2010</td>
<td>67%</td>
<td>33%</td>
</tr>
<tr>
<td>2011</td>
<td>64%</td>
<td>35%</td>
</tr>
<tr>
<td>2012</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>2013</td>
<td>60%</td>
<td>39%</td>
</tr>
<tr>
<td>2014</td>
<td>64%</td>
<td>36%</td>
</tr>
<tr>
<td>2015</td>
<td>64%</td>
<td>35%</td>
</tr>
</tbody>
</table>

* 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 (2015), the following are the beverages most frequently consumed (source: Gallup):

---

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• 372 •
• Beer: 42%
• Wine: 34%
• Spirits: 21%

The following is the distribution of those who drink alcoholic beverages (2015) by weekly consumption (source: Gallup):
• Less than one drink: 35%
• 1-to-7 drinks: 50%
• 8 or more drinks: 14%

Harris Poll (www.theharrispoll.com) reports consumption of alcoholic beverages by adults as follows:

<table>
<thead>
<tr>
<th>Gender</th>
<th>Daily</th>
<th>At least once per Week</th>
<th>At least once a month</th>
<th>Less than once a month</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female:</td>
<td>3%</td>
<td>21%</td>
<td>21%</td>
<td>33%</td>
<td>24%</td>
</tr>
<tr>
<td>Male:</td>
<td>7%</td>
<td>38%</td>
<td>18%</td>
<td>24%</td>
<td>20%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>Daily</th>
<th>At least once per Week</th>
<th>At least once a month</th>
<th>Less than once a month</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>21-to-34:</td>
<td>3%</td>
<td>33%</td>
<td>24%</td>
<td>21%</td>
<td>23%</td>
</tr>
<tr>
<td>35-to-46:</td>
<td>3%</td>
<td>30%</td>
<td>20%</td>
<td>32%</td>
<td>18%</td>
</tr>
<tr>
<td>47-to-65:</td>
<td>5%</td>
<td>29%</td>
<td>17%</td>
<td>31%</td>
<td>22%</td>
</tr>
<tr>
<td>66 and older:</td>
<td>11%</td>
<td>26%</td>
<td>18%</td>
<td>29%</td>
<td>27%</td>
</tr>
<tr>
<td>All</td>
<td>5%</td>
<td>29%</td>
<td>20%</td>
<td>29%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Those who drink alcoholic beverages at least several times a year drink the following types of beverages (source: Harris Poll):

<table>
<thead>
<tr>
<th></th>
<th>All</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beer:</td>
<td>63%</td>
<td>75%</td>
<td>50%</td>
</tr>
<tr>
<td>Domestic wine:</td>
<td>54%</td>
<td>45%</td>
<td>63%</td>
</tr>
<tr>
<td>Vodka:</td>
<td>41%</td>
<td>40%</td>
<td>43%</td>
</tr>
<tr>
<td>Rum:</td>
<td>34%</td>
<td>34%</td>
<td>35%</td>
</tr>
<tr>
<td>Imported wine:</td>
<td>28%</td>
<td>26%</td>
<td>31%</td>
</tr>
<tr>
<td>Tequila:</td>
<td>28%</td>
<td>27%</td>
<td>30%</td>
</tr>
<tr>
<td>Canadian/Irish/other whiskey:</td>
<td>20%</td>
<td>25%</td>
<td>14%</td>
</tr>
<tr>
<td>Champagne:</td>
<td>17%</td>
<td>13%</td>
<td>23%</td>
</tr>
<tr>
<td>Cordials and liqueurs:</td>
<td>17%</td>
<td>14%</td>
<td>20%</td>
</tr>
<tr>
<td>Bourbon:</td>
<td>15%</td>
<td>23%</td>
<td>6%</td>
</tr>
<tr>
<td>Gin:</td>
<td>14%</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>Scotch:</td>
<td>11%</td>
<td>17%</td>
<td>4%</td>
</tr>
<tr>
<td>Cognac:</td>
<td>8%</td>
<td>11%</td>
<td>4%</td>
</tr>
<tr>
<td>Brandy:</td>
<td>7%</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>Other:</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
</tr>
</tbody>
</table>

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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:

<table>
<thead>
<tr>
<th>Consumers</th>
<th>Consumers</th>
<th>Avg. Consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male, ages 19-to-49:</td>
<td>34.1%</td>
<td>14.7 fl. oz.</td>
</tr>
<tr>
<td>Male, ages 50 and older:</td>
<td>31.5%</td>
<td>9.1 fl. oz.</td>
</tr>
<tr>
<td>Female, ages 19-to-49:</td>
<td>20.6%</td>
<td>4.5 fl. oz.</td>
</tr>
<tr>
<td>Female, ages 50 and older:</td>
<td>16.0%</td>
<td>2.3 fl. oz.</td>
</tr>
</tbody>
</table>

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):

<table>
<thead>
<tr>
<th>Beer</th>
<th>Wine</th>
<th>Distilled Spirits</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 New Hampshire: # 2</td>
<td># 2</td>
<td># 1</td>
</tr>
<tr>
<td>2 District of Columbia: #14</td>
<td># 1</td>
<td># 2</td>
</tr>
<tr>
<td>3 Nevada: # 1</td>
<td># 4</td>
<td># 3</td>
</tr>
<tr>
<td>4 Delaware: #17</td>
<td># 5</td>
<td># 4</td>
</tr>
<tr>
<td>5 Wyoming: # 3</td>
<td>#33</td>
<td># 6</td>
</tr>
<tr>
<td>6 Wisconsin: # 6</td>
<td>#25</td>
<td># 5</td>
</tr>
<tr>
<td>7 Florida: #22</td>
<td>#14</td>
<td># 9</td>
</tr>
<tr>
<td>8 Colorado: #19</td>
<td>#16</td>
<td># 8</td>
</tr>
<tr>
<td>9 Montana: # 4</td>
<td>#23</td>
<td>#23</td>
</tr>
<tr>
<td>10 North Dakota: # 5</td>
<td>#42</td>
<td># 9</td>
</tr>
<tr>
<td>11 (tie) Massachusetts: #41</td>
<td># 5</td>
<td>#11</td>
</tr>
<tr>
<td>11 (tie) Arizona: #13</td>
<td>#19</td>
<td>#24</td>
</tr>
<tr>
<td>13 Vermont: #22</td>
<td># 8</td>
<td>#32</td>
</tr>
<tr>
<td>14 Alaska: #25</td>
<td>#19</td>
<td>#12</td>
</tr>
<tr>
<td>15 Rhode Island: #39</td>
<td># 8</td>
<td>#12</td>
</tr>
<tr>
<td>16 Minnesota: #30</td>
<td>#25</td>
<td># 6</td>
</tr>
<tr>
<td>17 (tie) South Dakota: # 8</td>
<td>#44</td>
<td>#19</td>
</tr>
<tr>
<td>17 (tie) New Mexico: # 6</td>
<td>#27</td>
<td>#36</td>
</tr>
<tr>
<td>19 (tie) Hawaii: #24</td>
<td>#15</td>
<td>#28</td>
</tr>
<tr>
<td>19 (tie) Louisiana: #11</td>
<td>#32</td>
<td>#19</td>
</tr>
<tr>
<td>21 Maine: #28</td>
<td>#18</td>
<td>#19</td>
</tr>
<tr>
<td>22 (tie) South Carolina: #16</td>
<td>#33</td>
<td>#17</td>
</tr>
<tr>
<td>22 (tie) Oregon: #32</td>
<td>#12</td>
<td>#26</td>
</tr>
<tr>
<td>24 Illinois: #27</td>
<td>#22</td>
<td>#17</td>
</tr>
<tr>
<td>25 Idaho: #37</td>
<td># 3</td>
<td>#41</td>
</tr>
<tr>
<td>26 Missouri: #20</td>
<td>#31</td>
<td>#26</td>
</tr>
<tr>
<td>27 New Jersey: #48</td>
<td>#11</td>
<td>#12</td>
</tr>
<tr>
<td>28 Nebraska: #11</td>
<td>#40</td>
<td>#34</td>
</tr>
<tr>
<td>29 (tie) Connecticut: #49</td>
<td># 7</td>
<td>#15</td>
</tr>
<tr>
<td>29 (tie) California: #42</td>
<td>#10</td>
<td>#31</td>
</tr>
</tbody>
</table>
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.

79.4 Nonalcoholic Beverages
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.

*State Of The Beverage Market 2015*, by *Beverage World*, reported non-alcoholic beverage market share as follows:

- Carbonated soft drinks: 39.8%
- Bottled water: 29.6%
- Functional drinks: 8.0%
- RTD tea: 6.2%
- 100% juice: 6.0%
- Sports drinks: 4.3%
- Energy drinks: 2.1%
- RTD coffee: 0.8%

According to *What America Drinks*, the percentages of demographics consuming various types of nonalcoholic beverages are as follows:

<table>
<thead>
<tr>
<th>Category</th>
<th>CSD</th>
<th>Coffee</th>
<th>Tea</th>
<th>Juice</th>
<th>Milk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male and female, ages 4-to-8</td>
<td>45.2%</td>
<td>1.0%</td>
<td>1.4%</td>
<td>37.3%</td>
<td>74.3%</td>
</tr>
<tr>
<td>Male, ages 9-to-13:</td>
<td>66.6%</td>
<td>2.4%</td>
<td>2.7%</td>
<td>30.6%</td>
<td>64.8%</td>
</tr>
<tr>
<td>Male, ages 14-to-18:</td>
<td>74.7%</td>
<td>3.1%</td>
<td>4.1%</td>
<td>26.5%</td>
<td>55.2%</td>
</tr>
<tr>
<td>Male, ages 19-to-49:</td>
<td>58.5%</td>
<td>39.7%</td>
<td>10.7%</td>
<td>22.2%</td>
<td>37.4%</td>
</tr>
<tr>
<td>Male, ages 50 and older:</td>
<td>35.1%</td>
<td>71.3%</td>
<td>17.3%</td>
<td>35.5%</td>
<td>45.3%</td>
</tr>
<tr>
<td>Female, ages 9-to-13:</td>
<td>60.5%</td>
<td>1.1%</td>
<td>4.8%</td>
<td>30.7%</td>
<td>59.9%</td>
</tr>
<tr>
<td>Female, ages 14-to-18:</td>
<td>67.0%</td>
<td>5.0%</td>
<td>5.9%</td>
<td>26.7%</td>
<td>43.5%</td>
</tr>
<tr>
<td>Female, ages 19-to-49:</td>
<td>51.0%</td>
<td>38.7%</td>
<td>14.2%</td>
<td>23.4%</td>
<td>32.5%</td>
</tr>
<tr>
<td>Female, ages 50 and older:</td>
<td>25.9%</td>
<td>67.9%</td>
<td>22.8%</td>
<td>34.3%</td>
<td>44.7%</td>
</tr>
</tbody>
</table>

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.
80

BEER

80.1 Market Assessment

The Brewers Association (www.brewersassociation.org) estimates U.S. beer sales in 2014 at $101.5 billion, a 0.5% increase from a year prior. In 2014, 197.12 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):

- 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%)
- 2014: $33.53 billion (4.9%)

According to Beer Handbook 2015, published by the Beverage Information Group (www.beinfogroup.com), the U.S. beer market is distributed by category as follows:

- Light: 51.7%
- Premium & super premium: 12.3%
- Popular: 7.7%
- Craft: 7.3%
- Ice: 3.6%
- Malt liquor: 2.3%
- Flavored malt beverages: 1.7%

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, 3,418 breweries were in operation in the U.S. in 2014, an increase from 2,917 a year prior. The distribution in 2014 was as follows:
• Microbreweries: 1,871
• Brewpubs: 1,412
• Regional craft breweries: 135
• Large breweries: 26
• Regional non-craft breweries: 20

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%

80.2 Market Leaders
According to IRI (www.iriworldwide.com), the top U.S. brewers, ranked by off-premise sales in 2014, were as follows (change from previous year in parenthesis):
• Anheuser-Busch/InBev: $15.11 billion (0.7%)
• MillerCoors: $ 7.75 billion (1.4%)
• Constellation: $ 2.48 billion (13.8%)
• Heineken USA: $ 1.48 billion (6.0%)
• Boston Beer: $ 740 million (28.5%)

80.3 Top Domestic Beer Brands
Beer Handbook 2015 reports the leading domestic beer brands ranked by sales in 2014 as follows (change from previous year in parenthesis):
• Bud Light (Anheuser-Busch/InBev): 551.7 million cases (-1.7%)
• Coors Light (MillerCoors): 244.9 million cases (-3.5%)
• Budweiser (Anheuser-Busch/InBev): 205.6 million cases (-4.6%)
• Miller Lite (MillerCoors): 186.9 million cases (-1.6%)
• Natural Light (Anheuser-Busch/InBev): 95.1 million cases (-6.8%)
• Busch Light (Anheuser-Busch/InBev): 89.4 million cases (-6.1%)
• Busch (Anheuser-Busch/InBev): 73.9 million cases (2.0%)
• Michelob Ultra (Anheuser-Busch/InBev): 57.0 million cases (2.3%)
• Keystone Light (MillerCoors): 48.5 million cases (-8.0%)
• Miller High Life (MillerCoors): 46.9 million cases (-6.0%)
• Yuengling (D.G. Yuengling & Son): 39.5 million cases (6.4%)

* 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

80.4 Demographics

The following is a demographic profile of the beer consumer (source: Behavioral Tracking Study, MillerCoors):

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 $40,000: 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:

<table>
<thead>
<tr>
<th>Outlet</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-premise</td>
<td>78%</td>
<td>22%</td>
</tr>
<tr>
<td>Convenience stores</td>
<td>74%</td>
<td>26%</td>
</tr>
<tr>
<td>Supermarket</td>
<td>68%</td>
<td>32%</td>
</tr>
<tr>
<td>Liquor store</td>
<td>74%</td>
<td>26%</td>
</tr>
</tbody>
</table>
80.5 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.; in 2014 there were 3,418, according to the Brewers Association.

According to the Brewers Association, retail sales of craft beer in 2014 were $19.6 billion, with 21.78 million barrels sold, increases of 22% and 18%, respectively, over the previous year. The craft brewing sales share in 2014 was 11.0% by volume and 19.3% by dollars.

According to Beer Handbook 2015, the leading craft brewers in 2014 were as follows (change from prior year in parenthesis):

- Boston Beer Co. (Boston, MA): 35,098 cases* (11.0%)
- Sierra Nevada Brewing Co. (Chico, CA): 14,711 cases (8.4%)
- New Belgium Brewing Co. (Fort Collins, CO): 13,023 cases (19.3%)
- Craft Brew Alliance (Portland, OR): 10,913 cases (9.1%)
- Lagunitas Brewing Co. (Petaluma, CA): 8,285 cases (49.8%)
- Spoetzl Brewing Co. (Shiner, TX): 8,253 cases (5.6%)
- Deschutes Brewery (Bend, OR): 4,642 cases (17.1%)
- Bell’s Brewery (Galesburg, MI): 4,399 cases (28.6%)
- Stone Brewing (Escondido, CA): 3,959 cases (34.7%)
- Brooklyn Brewery (Brooklyn, NY): 3,473 cases (16.7%)

* cases are 2.25 gallons

Cheers’ OnTrac Study 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%

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.
“Craft brewers now can say that more than one in 10 of every beer produced in the U.S. is from among their ranks.”

State Of The Beverage Market 2015
Beverage World, 5/15

80.6 Imported Beer

By volume, imported beer consumption increased 5.4% in 2014, to 400.2 million cases.

According to *Beer Handbook 2015*, the leading imported beer brands in 2014 were as follows (change from previous year in parenthesis):

- Corona Extra (Crown Imports): 107.7 million cases (5.2%)
- Modelo Especial (Crown Imports): 59.9 million cases (22.0%)
- Heinekin (Heineken USA): 52.5 million cases (-1.3%)
- Dos Equis (Heineken USA): 25.0 million cases (15.6%)
- Stella Artois (Anheuser-Busch/InBev): 22.8 million cases (9.1%)
- Tecate (Heineken USA): 14.5 million cases (-3.7%)
- Corona Light (Crown Imports): 14.3 million cases (3.5%)
- Guinness Stout (Diageo-Guinness): 12.6 million cases (-3.5%)
- Labatt Blue (North American Breweries): 8.8 million cases (-5.7%)
- Pacifico (Crown Imports): 6.6 million cases (6.2%)

* cases are 2.25 gallons

“The big story for beer imports continues to be the U.S. consumers’ apparently unquenchable thirst for Mexican beer.”

State Of The Beverage Market 2015
Beverage World, 5/15
80.7 Cider

Long popular in the U.K., the U.S. market for hard cider, or fermented cider, is experiencing strong growth.

United States Association of Cider Makers (www.ciderassociation.org) reports U.S. cider sales as follows (change from prior year in parenthesis):

- 2010: 4.5 million cases (10.1%)
- 2011: 5.4 million cases (20.2%)
- 2012: 9.6 million cases (74.5%)
- 2013: 15.6 million cases (64.8%)
- 2014: 26.2 million cases (68.3%)

Ranked by retail sales, the following are the leading cider brands (source: IRI):

<table>
<thead>
<tr>
<th></th>
<th>Sales</th>
<th>Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angry Orchard:</td>
<td>$214.5 million</td>
<td>6,319 cases*</td>
</tr>
<tr>
<td>Woodchuck:</td>
<td>$38.1 million</td>
<td>1,115 cases</td>
</tr>
<tr>
<td>Johnny Appleseed:</td>
<td>$22.6 million</td>
<td>717 cases</td>
</tr>
<tr>
<td>Smith and Forge:</td>
<td>$21.3 million</td>
<td>697 cases</td>
</tr>
<tr>
<td>Strongbow:</td>
<td>$16.3 million</td>
<td>480 cases</td>
</tr>
<tr>
<td>Stella Artois Cidre:</td>
<td>$11.9 million</td>
<td>266 cases</td>
</tr>
<tr>
<td>Crispin:</td>
<td>$8.4 million</td>
<td>188 cases</td>
</tr>
<tr>
<td>Michelob Cider:</td>
<td>$7.3 million</td>
<td>236 cases</td>
</tr>
<tr>
<td>Hornsby’s:</td>
<td>$6.0 million</td>
<td>202 cases</td>
</tr>
</tbody>
</table>

* cases are 288 ounces

“The cider segment is the fastest-growing segment in the alcohol industry. Annual gains in the cider market have risen for some time now, growing 700% since 2009.”

Cheers, 7/15

80.8 On-Premise Consumption

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 MillerCoors, 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.

80.9 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.bevinfosgroup.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)

United States Association of Cider Makers, 2650 West 2nd Avenue, Suite 10, Denver, CO 80219. (303) 695-0780. (www.ciderassociation.org)


**DISTILLED SPIRITS**

**81.1 Market Assessment**

The Distilled Spirits Council of the United States (DISCUS, www.discus.org) provides the following assessment of the distiller revenue for spirits sold in the U.S.:

- 2003: $13.87 billion
- 2004: $15.12 billion
- 2005: $16.00 billion
- 2006: $17.20 billion
- 2007: $18.20 billion
- 2008: $18.72 billion
- 2009: $18.74 billion
- 2010: $19.16 billion
- 2011: $20.36 billion
- 2012: $21.29 billion
- 2013: $22.25 billion
- 2014: $23.10 billion

Retail and foodservice sales are roughly three times distiller revenue.

The spirit market distribution by volume in 2014, and, for comparison, in 1990, were as follows (source: Beverage Information Group [www.beveragenet.net]):

<table>
<thead>
<tr>
<th>1990</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vodka: 22%</td>
<td>34%</td>
</tr>
<tr>
<td>Whiskey: 37%</td>
<td>23%</td>
</tr>
<tr>
<td>- straight: 8%</td>
<td>9%</td>
</tr>
<tr>
<td>- Canadian: 13%</td>
<td>7%</td>
</tr>
<tr>
<td>- Scotch: 10%</td>
<td>4%</td>
</tr>
<tr>
<td>- blended: 6%</td>
<td>2%</td>
</tr>
<tr>
<td>- Irish: &lt;1%</td>
<td>1%</td>
</tr>
<tr>
<td>Rum: 9%</td>
<td>13%</td>
</tr>
<tr>
<td>Cordials and liqueurs: 11%</td>
<td>10%</td>
</tr>
<tr>
<td>Tequila: 3%</td>
<td>7%</td>
</tr>
<tr>
<td>Gin: 8%</td>
<td>5%</td>
</tr>
<tr>
<td>Brandy and cognac: 5%</td>
<td>5%</td>
</tr>
<tr>
<td>RTD cocktails: 5%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Shipments and revenue of distilled spirits in 2014, by category, were as follows (change from previous year in parenthesis):

<table>
<thead>
<tr>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total: 210.30 million cases (2.2%)</td>
<td>$23.10 billion (4.0%)</td>
</tr>
<tr>
<td>Whiskey: 56.61 million cases (7.3%)</td>
<td>$ 7.53 billion (7.4%)</td>
</tr>
<tr>
<td>Vodka: 66.94 million cases (1.6%)</td>
<td>$ 5.77 billion (3.3%)</td>
</tr>
<tr>
<td>Cordials and liqueurs: 20.41 million cases (-1.1%)</td>
<td>$ 2.46 billion (-0.3%)</td>
</tr>
<tr>
<td>Rum: 25.18 million cases (-1.5%)</td>
<td>$ 2.37 billion (-0.8%)</td>
</tr>
<tr>
<td>Category</td>
<td>Sales (in billions)</td>
</tr>
<tr>
<td>------------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Tequila</td>
<td>$2.11 billion</td>
</tr>
<tr>
<td>Brandy and cognac</td>
<td>$1.71 billion</td>
</tr>
<tr>
<td>Gin</td>
<td>$866 million</td>
</tr>
<tr>
<td>RTD cocktails</td>
<td>$315 million</td>
</tr>
</tbody>
</table>

*9-liter case equivalents*

### 81.2 Major Brands

By category, the following are major distilled spirits brands (source: DISCUS):

#### 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, Hennessey VS, James Cardin VSOP, Martell VS
- **Super premium**: Hennessey VSOP, Rémy Martin VSOP, most XOs

#### Cordials & Liqueurs
- **Value**: Arrow, Dekuyper, Hiram Walker
- **Premium**: Baileys, Jägermeister, Kahlua, Southern Comfort
- **High end premium**: Chambord, Cointreau, Drambuie, Grand Marnier
- **Super premium**: Grand Marnier Centenaire

#### 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

#### RTD Cocktails
- **Value**: Arrow, Club, Fridays, Salvadors
- **Premium**: Bacardi Cocktails, Cuervo Margaritas, Jack Daniels Country Coolers, Kahlua RTDs, Malibu Cocktails, Skinny Girl, Smirnoff Cocktails

#### 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 Horizontes
• Super premium: Cabo Wabo, Don Julio, Herradura, Patrón, Sauza Tres Generaciones

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

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

Whisky: Scotch
• 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

Whisky: 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: Irish
• High end premium: Bushmills, John Jameson, Michael Collins
• Super premium: Black Bush, Jameson 12

### 81.3 Brandy and Cognac
Shipments and distiller revenue for brandy and cognac have been as follows
(source: DISCUS):

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>10.88 million cases</td>
<td>$1.47 billion</td>
</tr>
<tr>
<td>2011</td>
<td>10.94 million cases</td>
<td>$1.44 billion</td>
</tr>
<tr>
<td>2012</td>
<td>10.86 million cases</td>
<td>$1.46 billion</td>
</tr>
<tr>
<td>2013</td>
<td>10.99 million cases</td>
<td>$1.26 billion</td>
</tr>
<tr>
<td>2014</td>
<td>11.12 million cases</td>
<td>$1.55 billion</td>
</tr>
</tbody>
</table>

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The following are the leading brands of brandy and cognac in the U.S., ranked by number of cases shipped in 2014 (source: The Beverage Information Group, change from previous year in parenthesis):

- E&J: 3.13 million cases (-0.5%)
- Hennessey: 2.58 million cases (7.7%)
- Paul Masson: 1.56 million cases (16.0%)
- Christian Brothers: 1.16 million cases (1.9%)
- Rémy Martin: 626,000 cases (0.8%)
- Courvoisier: 440,000 cases (6.8%)

Cognac accounts for one-third of all brandy consumed by Americans. By French law, supported by the World Trade Organization (www.wto.org), the spirit can originate only in the town of Cognac and six surrounding viticultural areas.

Because cognac and brandy represent the good life, their market is sometimes suggested as a reflection of the overall economy.

Cognac is increasingly being consumed as a main drink or ingredient in a cocktail rather than merely as traditional after-dinner digestif. Brandy-based cocktails are far from new. Patrick Gavin Duffy’s 1934 classic *The Official Mixer’s Manual* contains some 100 cognac-based cocktails. The current emphasis reflects the increased popularity of upscale cocktails.

### 81.4 Cordials and Liqueurs

Shipment and distiller revenue for cordials and liqueurs have been as follows (source: DISCUS):

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>19.92 million cases</td>
<td>$2.28 billion</td>
</tr>
<tr>
<td>2011</td>
<td>20.28 million cases</td>
<td>$2.44 billion</td>
</tr>
<tr>
<td>2012</td>
<td>21.24 million cases</td>
<td>$2.51 billion</td>
</tr>
<tr>
<td>2013</td>
<td>20.65 million cases</td>
<td>$2.46 billion</td>
</tr>
<tr>
<td>2014</td>
<td>20.41 million cases</td>
<td>$2.46 billion</td>
</tr>
</tbody>
</table>

The following are the leading brands of cordials and liqueurs in the U.S., ranked by number of cases shipped in 2014 (source: The Beverage Information Group, change from previous year in parenthesis):

- DeKuyper: 2.25 million cases (-4.8%)
- Jägermeister: 2.19 million cases (-10.4%)
- Fireball: 1.87 million cases (n/a)
- Baileys: 1.38 million cases (3.6%)
- Southern Comfort: 1.12 million cases (-3.9%)
- Kahlua: 899,000 cases (-5.3%)
- Hiram Walker Cordials: 828,000 cases (-6.0%)

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- Jack Daniels Tennessee Honey: 609,000 cases (25.1%)
- Grand Marnier: 500,000 cases (no change)

The cordial or liqueur category is the largest and most diverse in terms of the number of brands, flavors, and alcohol content. It also is one of the largest in total case sales. Products in this category encompass all flavors and are used as after-dinner drinks, aperitifs, components of classic cocktails or popular shooters, or flavorful enhancements to foods.

Originating in Europe, cordials and liqueurs are alcoholic beverages that are prepared by mixing or compounding various spirits with flavorings. The cordial category includes schnapps, liqueurs, cremes, and brandies.

### 81.5 Gin

Shipments and distiller revenue for gin have been as follows (source: DISCUS):

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>10.91 million cases</td>
<td>$857 million</td>
</tr>
<tr>
<td>2011</td>
<td>10.57 million cases</td>
<td>$850 million</td>
</tr>
<tr>
<td>2012</td>
<td>10.73 million cases</td>
<td>$872 million</td>
</tr>
<tr>
<td>2013</td>
<td>10.32 million cases</td>
<td>$866 million</td>
</tr>
<tr>
<td>2014</td>
<td>10.04 million cases</td>
<td>$865 million</td>
</tr>
</tbody>
</table>

The following are the leading brands of gin in the U.S., ranked by number of cases shipped in 2014 (source: The Beverage Information Group, change from previous year in parenthesis):

- Seagram’s Gin: 1.94 million cases (-8.4%)
- Tanqueray: 1.31 million cases (1.6%)
- Bombay Sapphire: 883,000 cases (0.6%)
- New Amsterdam: 730,000 cases (no change)
- Gordon’s: 630,000 cases (-7.4%)
- Beefeater: 494,000 cases (-2.9%)
- Barton: 374,000 cases (1.1%)
- Gilbey’s: 352,000 cases (-4.3%)

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 resurgence of the cocktail has attracted smaller artisanal brands of gin to enter the marketplace.”

*Beverage Dynamics, 7/15*

### 81.6 RTD Cocktails

Shipments and distiller revenue for ready-to-drink (RTD) cocktails have been as follows (source: DISCUS):

<table>
<thead>
<tr>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013: 6.27 million cases</td>
<td>$348 million</td>
</tr>
<tr>
<td>2014: 5.69 million cases</td>
<td>$315 million</td>
</tr>
</tbody>
</table>

The following are the leading brands of RTD cocktails in the U.S., ranked by number of cases shipped in 2014 (source: The Beverage Information Group, change from previous year in parenthesis):

- **Jose Cuervo RTD:** 905,000 cases (-3.7%)
- **Jack Daniel's Country Cocktails:** 805,000 cases (6.9%)
- **Chi-Chi's:** 376,000 cases (0.3%)
- **Bacardi Party:** 320,000 cases (-9.1%)
- **Kahlua Drinks To Go:** 310,000 cases (-0.3%)  

### 81.7 Rum

Shipments and distiller revenue for rum have been as follows (source: DISCUS):

<table>
<thead>
<tr>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010: 24.88 million cases</td>
<td>$2.18 billion</td>
</tr>
<tr>
<td>2011: 25.12 million cases</td>
<td>$2.27 billion</td>
</tr>
<tr>
<td>2012: 25.50 million cases</td>
<td>$2.32 billion</td>
</tr>
<tr>
<td>2013: 25.57 million cases</td>
<td>$2.39 billion</td>
</tr>
<tr>
<td>2014: 25.18 million cases</td>
<td>$2.37 billion</td>
</tr>
</tbody>
</table>

The following are the leading brands of rum in the U.S., ranked by number of cases shipped in 2014 (source: The Beverage Information Group, change from previous year in parenthesis):

- **Bacardi:** 7.45 million cases (-4.8%)
- **Captain Morgan:** 5.76 million cases (0.4%)
• Malibu: 1.84 million cases (-2.2%)
• Admiral Nelson: 836,000 cases (2.0%)
• Cruzan: 750,000 cases (1.2%)
• Sailor Jerry: 738,000 cases (0.7%)
• Castilio: 722,000 cases (-7.1%)
• The Kraken: 424,000 cases (30.5%)
• Parrot Bay: 355,000 cases (-9.0%)
• Ronrico: 342,000 cases (-9.3%)

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.

_________________________________________________________________

“Rum has variety greater than just about any other spirit, ranging in character from white to gold to dark. Light rum’s mixability is unequaled by vodka or tequila, and gold rum brings complexity to cocktails. Rich, barrel-aged sippers can hold their own against other brown spirits, aficionados say, including bourbon. There is something for every drinking occasion and consumer palate. Rum has got it all.”

Beverage Dynamics, 7/15

_________________________________________________________________
81.8 Tequila

Shipments and distiller revenue for tequila have been as follows (source: DISCUS):

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>11.56 million cases</td>
<td>$1.71 billion</td>
</tr>
<tr>
<td>2011</td>
<td>11.98 million cases</td>
<td>$1.80 billion</td>
</tr>
<tr>
<td>2012</td>
<td>12.33 million cases</td>
<td>$1.88 billion</td>
</tr>
<tr>
<td>2013</td>
<td>13.13 million cases</td>
<td>$2.03 billion</td>
</tr>
<tr>
<td>2014</td>
<td>13.80 million cases</td>
<td>$2.11 billion</td>
</tr>
</tbody>
</table>

The following are the leading brands of tequila in the U.S., ranked by number of cases shipped in 2014 (source: The Beverage Information Group, change from previous year in parenthesis):

- José Cuervo: 3.08 million cases (1.7%)
- Patrón: 2.15 million cases (3.6%)
- Sauza: 2.09 million cases (2.4%)
- 1800: 1.04 million cases (0.9%)
- Juarez: 900,000 cases (9.8%)
- Familia Camarena: 725,000 cases (27.0%)
- Montezuma: 585,000 cases (5.4%)

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.

“Consumers are cultivating a taste for high-end, aged tequilas, and developing an interest in more esoteric aspects of agave.”

Beverage Dynamics, 4/15
81.9 Vodka

Shipments and distiller revenue for vodka have been as follows (source: DISCUS):

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>59.39 million cases</td>
<td>$4.79 billion</td>
</tr>
<tr>
<td>2011</td>
<td>62.67 million cases</td>
<td>$5.20 billion</td>
</tr>
<tr>
<td>2012</td>
<td>65.18 million cases</td>
<td>$5.47 billion</td>
</tr>
<tr>
<td>2013</td>
<td>65.87 million cases</td>
<td>$5.59 billion</td>
</tr>
<tr>
<td>2014</td>
<td>66.94 million cases</td>
<td>$5.78 billion</td>
</tr>
</tbody>
</table>

The following are the leading brands of vodka in the U.S., ranked by number of cases shipped in 2014 (source: The Beverage Information Group; change from previous year in parenthesis):

- Smirnoff: 9.31 million cases (-2.8%)
- Absolut: 4.14 million cases (-6.9%)
- Svedka: 4.08 million cases (3.3%)
- Grey Goose: 2.87 million cases (-1.1%)
- Skyy: 2.81 million cases (-1.6%)
- Pinnacle: 2.68 million cases (-2.9%)
- Burnett’s: 2.61 million cases (11.0%)
- New Amsterdam: 2.48 million cases (25.4%)
- Tito’s Handmade: 2.20 million cases (83.3%)
- Ketel One: 2.18 million cases (1.2%)

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.
“Nearly one of every three bottles of spirits sold in the U.S. is vodka. Its reputation is reviving among bartenders. Some places are establishing themselves as destinations for vodka lovers, with outsized selections and creative drinks. Vodka is back; fans always knew it never left.”

Cheers, 5/15

81.10 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 whiskies 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.

Shipments and distiller revenue for whiskey have been as follows (source: DISCUS):

**American Bourbon and Straight Whiskey**

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>15.44 million cases</td>
<td>$1.91 billion</td>
</tr>
<tr>
<td>2011</td>
<td>16.04 million cases</td>
<td>$2.06 billion</td>
</tr>
<tr>
<td>2012</td>
<td>16.88 million cases</td>
<td>$2.22 billion</td>
</tr>
<tr>
<td>2013</td>
<td>18.03 million cases</td>
<td>$2.45 billion</td>
</tr>
<tr>
<td>2014</td>
<td>19.36 million cases</td>
<td>$2.68 billion</td>
</tr>
</tbody>
</table>

**Canadian Whisky**

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>15.81 million cases</td>
<td>$1.50 billion</td>
</tr>
<tr>
<td>2011</td>
<td>15.70 million cases</td>
<td>$1.55 billion</td>
</tr>
<tr>
<td>2012</td>
<td>16.03 million cases</td>
<td>$1.60 billion</td>
</tr>
</tbody>
</table>
• 2013: 16.49 million cases $1.70 billion
• 2014: 16.34 million cases $1.71 billion

Irish Whiskey

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>1.38 million cases</td>
<td>$256 million</td>
</tr>
<tr>
<td>2011</td>
<td>1.76 million cases</td>
<td>$335 million</td>
</tr>
<tr>
<td>2012</td>
<td>2.16 million cases</td>
<td>$415 million</td>
</tr>
<tr>
<td>2013</td>
<td>2.54 million cases</td>
<td>$500 million</td>
</tr>
<tr>
<td>2014</td>
<td>2.77 million cases</td>
<td>$553 million</td>
</tr>
</tbody>
</table>

Scotch Whisky

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>9.06 million cases</td>
<td>$1.59 billion</td>
</tr>
<tr>
<td>2011</td>
<td>9.07 million cases</td>
<td>$1.68 billion</td>
</tr>
<tr>
<td>2012</td>
<td>9.23 million cases</td>
<td>$1.81 billion</td>
</tr>
<tr>
<td>2013</td>
<td>9.56 million cases</td>
<td>$1.98 billion</td>
</tr>
<tr>
<td>2014</td>
<td>9.44 million cases</td>
<td>$2.01 billion</td>
</tr>
</tbody>
</table>

The following are the leading brands of whiskey in the U.S., ranked by number of cases shipped in 2014 (source: Liquor Handbook 2015, published by The Beverage Information Group, change from previous year in parenthesis):

**American Bourbon and Straight Whiskey**
- Jack Daniel's: 4.88 million cases (1.7%)
- Jim Beam family: 4.19 million cases (5.4%)
- Evan Williams: 1.86 million cases (13.0%)
- Makers Mark (incl. 46): 1.34 million cases (7.1%)
- Bulleit: 635,000 cases (41.1%)
- Wild Turkey: 590,000 cases (no change)
- Early Times: 531,000 cases (-4.8%)
- Old Crow: 467,000 cases (5.4%)
- Ten High: 450,000 cases (no change)
- Ancient Age/AAA: 355,000 cases (-1.4%)
- Woodford Reserve SBL: 276,000 cases (24.9%)
“There may never have been a time like now in the long history of American whiskey. Bourbon, of course, is on fire, and distillers are now dealing with the scramble to create greater supply. But along with Bourbon have risen the other American whiskies, especially Tennessee and most remarkably, rye. There seems to be no end of good news for American whiskey makers and sellers.”

_Beverage Dynamics, 9/15_

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**Canadian Whisky**

- Crown Royal: 4.28 million cases (-0.5%)
- Black Velvet: 2.05 million cases (1.7%)
- Canadian Mist: 1.49 million cases (-3.1%)
- Canadian Club: 1.21 million cases (1.0%)
- Windsor Supreme: 896,000 cases (-4.6%)
- Rich & Rare: 870,000 cases (4.2%)
- Seagram’s V.O.: 820,000 cases (-5.7%)
- Canadian LTD: 685,000 cases (-2.1%)
- Canadian Hunter: 392,000 cases (-0.8%)
- Lord Calvert: 370,000 cases (-10.5%)

**Irish Whiskey**

- Jameson: 2.01 million cases (7.7%)
- Bushmills: 185,000 cases (-11.9%)
- Tullamore Dew: 141,000 cases (23.2%)

**Scotch Whisky**

- House of Dewar’s: 1.19 million cases (-4.6%)
- Johnnie Walker Black: 886,000 cases (-5.7%)
- Johnnie Walker Red: 712,000 cases (0.3%)
- Clan MacGregor: 463,000 cases (-1.5%)
- Buchanan: 430,000 cases (28.4%)
- The Glenlivet: 387,000 cases (no change)
- Chivas Regal: 358,000 cases (-8.7%)
81.11 Market Resources
Beverage Information Group, 17 High Street, 2nd Floor, Norwalk, CT 06851. (203) 855-8499. (www.beveragenet.net)

82

WINE

82.1 Market Assessment

According to the Wine Institute (www.wineinstitute.org), wine consumption in the U.S. has been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>All Wine</th>
<th>Table Wine</th>
<th>Per Capita</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>691 ml.</td>
<td>609 ml.</td>
<td>2.34 gal.</td>
</tr>
<tr>
<td>2006</td>
<td>717 ml.</td>
<td>628 ml.</td>
<td>2.40 gal.</td>
</tr>
<tr>
<td>2007</td>
<td>742 ml.</td>
<td>647 ml.</td>
<td>2.46 gal.</td>
</tr>
<tr>
<td>2008</td>
<td>746 ml.</td>
<td>650 ml.</td>
<td>2.45 gal.</td>
</tr>
<tr>
<td>2009</td>
<td>763 ml.</td>
<td>666 ml.</td>
<td>2.49 gal.</td>
</tr>
<tr>
<td>2010</td>
<td>784 ml.</td>
<td>681 ml.</td>
<td>2.53 gal.</td>
</tr>
<tr>
<td>2011</td>
<td>836 ml.</td>
<td>724 ml.</td>
<td>2.68 gal.</td>
</tr>
<tr>
<td>2012</td>
<td>856 ml.</td>
<td>749 ml.</td>
<td>2.73 gal.</td>
</tr>
<tr>
<td>2013</td>
<td>886 ml.</td>
<td>769 ml.</td>
<td>2.80 gal.</td>
</tr>
<tr>
<td>2014</td>
<td>893 ml.</td>
<td>769 ml.</td>
<td>2.80 gal.</td>
</tr>
</tbody>
</table>

* All wine types include dessert wine, sparkling wine, table wine, vermouth, and other special natural wine.

The Wine Market Council (www.winemarketcouncil.com) reports growth in per capita consumption as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>2.5%</td>
</tr>
<tr>
<td>2006</td>
<td>3.7%</td>
</tr>
<tr>
<td>2007</td>
<td>3.5%</td>
</tr>
<tr>
<td>2008</td>
<td>0.9%</td>
</tr>
<tr>
<td>2009</td>
<td>1.1%</td>
</tr>
<tr>
<td>2010</td>
<td>1.8%</td>
</tr>
<tr>
<td>2011</td>
<td>3.2%</td>
</tr>
<tr>
<td>2012</td>
<td>1.8%</td>
</tr>
<tr>
<td>2013</td>
<td>2.0%</td>
</tr>
<tr>
<td>2014</td>
<td>1.2%</td>
</tr>
</tbody>
</table>

Distribution of the U.S. table wine market by origin is as follows (source: Beverage Information Group [www.beveragenet.net]):

- California: 68%
- Imported: 26%
- Other states: 6%

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):
• 2005: $ 8.3 billion (5.1%)
• 2006: $ 8.6 billion (3.9%)
• 2007: $ 9.2 billion (7.2%)
• 2008: $ 9.4 billion (1.5%)
• 2009: $ 9.5 billion (1.1%)
• 2010: $ 9.8 billion (2.9%)
• 2011: $10.2 billion (4.4%)
• 2012: $10.5 billion (3.3%)
• 2013: $10.9 billion (3.4%)
• 2014: $11.2 billion (3.0%)

Euromonitor (www.euromonitor.com) assessed 2014 U.S. retail sales of wine at $26.8 billion; global sales were $155.0 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 in 2014 were as follows (change from previous year in parenthesis):
• Table wine: $9.2 billion (4.5%)
• Sparkling wine/champagne: $ 808 million (8.6%)

“This past year marked the U.S. wine market’s 21st consecutive year of growth. While table wine saw solid growth, the sparkling jewel of the market has been sparkling wines, and prosecco in particular is a hot wine category.”

State Of The Beverage Market 2015
Beverage World, 5/15

Sales of prosecco, a sparkling wine from northeastern Italy, increased 32% in 2014, according to The Nielsen Company.

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). According to M. Shanken Communications (www.mshanken.com), Americans consume more than 260 million glasses of sparkling wine during the holiday season. Beverage World reported direct-to-consumer wine shipments in 2014 at 3.95 million cases and $1.82 billion in sales, a 15.5% increase from the prior year.

The U.S. surpassed France as the world’s largest wine market in 2013.
82.2 Market Leaders

According to Wine Handbook 2015, by Beverage Information Group, the leading brands of table wine in 2014, ranked by annual sales of 9-liter case equivalents, were as follows (change from prior year in parenthesis):

**Table Wine**

- Franzia Winetaps: 25.17 million cases (0.7%)
- Barefoot Cellars: 16.42 million cases (3.5%)
- Carlo Rossi: 11.89 million cases (-1.9%)
- Sutter Home: 9.88 million cases (-8.1%)
- Woodbridge by Robert Mondavi: 9.15 million cases (2.0%)
- Twin Valley: 9.10 million cases (no change)
- Yellow Tail: 8.30 million cases (-2.9%)
- Peter Vella: 7.05 million cases (no change)
- Beringer: 5.61 million cases (3.8%)
- Livingston Cellars: 5.43 million cases (-1.6%)

**Sparkling Wine**

- Andre/Wycliff: 2.82 million cases (-3.3%)
- Cook’s: 1.86 million cases (5.7%)
- Korbel: 1.32 million cases (3.0%)
- Barefoot Bubbly: 1.15 million cases (22.3%)
- Verdi Spurante: 1.12 million cases (-1.1%)

**Champagne**

- Veuve Clicquot: 405,000 cases (9.5%)
- Moët & Chandon: 370,000 cases (5.7%)

According to IRI, the following were the top wine brands sold in 2014 at supermarkets, drug stores, convenience stores, and mass merchandisers (change from prior year in parenthesis):

- Barefoot Cellars: $607.1 million (6.0%)
- Sutter Home: $359.3 million (-2.6%)
- Franzia Winetaps: $325.9 million (4.4%)
- Woodbridge by Robert Mondavi: $310.6 million (3.2%)
- Yellow Tail: $295.8 million (-2.5%)

82.3 Wine Consumer Characteristics

According to the 2015 Consumer Tracking Study, conducted for the Wine Market Council (www.winemarketcouncil.com), among 230 million U.S. adults, 100 million are wine drinkers.

Distribution of adults by consumption characteristics is as follows:
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): 30%
- Generation X (age 37-to-48): 20%
- Baby Boomers (age 49-to-67): 39%
- Seniors (age 68 and older): 11%

**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%

“Millennial consumers make up 30% of high frequency wine drinkers, so this consumer segment is helping to drive wine sales.”

_STATE OF THE BEVERAGE MARKET 2015_  
_Beverage World, 5/15_
82.4 Wine Consumer Demographics

According to International Demographics (www.themediaaudit.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

82.5 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.

82.6 Market Resources

Wine Institute, 425 Market Street, Suite 1000, San Francisco, CA 94105. (415) 512-0151. (www.wineinstitute.org)

83

CARBONATED SOFT DRINKS

83.1 Overview
Consumption of carbonated soft drinks (CSD) has experienced 10 consecutive years of decline. Still, even with declining consumption, CSDs rank as #1 in the U.S. liquid refreshment beverage market, accounting for 39.8% of all nonalcoholic beverages (by volume) consumed, excluding tap water.

Canadean (www.canadean.com) assesses CSD consumption and sales growth as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Consumption Growth</th>
<th>Sales Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>-1.7%</td>
<td>1.5%</td>
</tr>
<tr>
<td>2013</td>
<td>-3.5%</td>
<td>-1.2%</td>
</tr>
<tr>
<td>2014</td>
<td>-2.1%</td>
<td>-0.1%</td>
</tr>
</tbody>
</table>

“The CSD category is facing challenging headwinds, such as concerns about obesity and the sugar and calorie contents of regular soft drinks and artificial ingredients in diet soft drinks. CSDs are increasingly competing with other beverage categories that have offered consumers more in the way of innovation and functionality. However, the fact remains that consumers are still drinking CSDs.”

State Of The Beverage Market 2015
Beverage World, 5/15

83.2 Market Assessment
Euromonitor assesses the 2014 CSD market as follows (change from prior year
83.3 Consumption

According to IBISworld (www.ibisworld.com), CSD consumption has been, and is projected, as follows:

- 2007: 45 gallons per consumer
- 2008: 44 gallons per consumer
- 2009: 43 gallons per consumer
- 2010: 43 gallons per consumer
- 2011: 43 gallons per consumer
- 2012: 42 gallons per consumer
- 2013: 41 gallons per consumer
- 2014: 40 gallons per consumer
- 2015: 39 gallons per consumer
- 2016: 38 gallons per consumer
- 2017: 38 gallons per consumer
- 2018: 37 gallons per consumer
- 2019: 36 gallons per consumer
- 2020: 35 gallons per consumer

“Per capita consumption of CSDs is forecast to continue to decline as consumers increasingly drink other beverages for refreshment or healthy functionality. As the beverage market expands, the CSD market has faced steady competition from new and growing categories like bottled water, energy drinks, RTD tea and coffee, and functional drinks. Taxes and bans on soft drinks implemented at the state and city levels of government will likely also contribute to a further decline in CSD volume.”

State Of The Beverage Market 2015
Beverage World, 5/15
83.4 Market Leaders

State Of The Beverage Market 2015, by Beverage World, reports overall market share by soft drink beverage company as follows:

- Coca-Cola Company: 39%
- PepsiCo Inc.: 30%
- Dr. Pepper Snapple Group: 22%
- Private label: 6%
- All others: 3%

Market share by soft drink brand is 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.boylanbottling.com)
- Dry Soda Co. (www.drysoda.com)
- Jones Soda Co. (www.jonessoda.com)
- Reed’s Inc. (www.reedsgingerbrew.com)

83.5 Heavy Soft Drink Consumers

Among all U.S. adults, 11.6% are heavy soft drink consumers, defined as those consuming 10 or more soft drinks per week.

According to International Demographics (www.themediaaudit.com), the following are the metropolitan areas with 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%
FUNCTIONAL BEVERAGES

84.1 Energy Drinks

Packaged Facts (www.packagedfacts.com) assesses the annual 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.

Canadean (www.canadean.com) assesses energy drink consumption and sales growth as follows:

<table>
<thead>
<tr>
<th>Consumption Growth</th>
<th>Sales Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012: 14.9%</td>
<td>15.2%</td>
</tr>
<tr>
<td>2013: 3.0%</td>
<td>3.1%</td>
</tr>
<tr>
<td>2014: 4.9%</td>
<td>5.3%</td>
</tr>
</tbody>
</table>

According to IRI (www.iriworldwide.com), retail sales of energy drinks are $10.9 billion, with energy shots accounting for $1.1 billion of the total.

More than 2,000 energy drink brands are on the market in the U.S., according to Brandweek.

State Of The Beverage Market 2015, by Beverage World, reported market leaders as follows (change from prior year in parenthesis):

**Energy Drinks**
- Red Bull: $3.73 billion (7.1%)
- Monster Energy: $1.35 billion (9.9%)
- Monster Zero Ultra: $360 million (25.0%)
- NOS: $355 million (25.0%)
- Java Monster: $317 million (10.4%)
- Monster Energy Rehab: $311 million (-11.2%)
- Rockstar: $302 million (3.8%)
- Monster Lo Carb: $294 million (-7.2%)
- Monster Mega Energy: $242 million (1.6%)
- Monster Absolute Zero: $176 million (-18.6%)

**Energy Shots**
- 5 Hour Energy: $1.19 billion (1.0%)
- Stacker 2, 6 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 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

84.2 Sports Drinks

The annual U.S. sports drink market is $7.4 billion, according to Packaged Facts. Canadean (www.canadean.com) assesses sports drink consumption and sales growth as follows:

<table>
<thead>
<tr>
<th>Consumption Growth</th>
<th>Sales Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012: 2.5%</td>
<td>2.4%</td>
</tr>
<tr>
<td>2013: 0.5%</td>
<td>2.9%</td>
</tr>
<tr>
<td>2014: 0.2%</td>
<td>3.9%</td>
</tr>
</tbody>
</table>

The average consumer drinks approximately 4.3 gallons of sports drinks annually, according to Beverage Marketing Corporation (www.beveragemarketing.com). According to Packaged Facts, there are 77 million consumers of sports drinks in the U.S. Sixty-four percent (64%) of high-volume sports drink consumers are males, 36% are Millennials, 25% are Baby Boomers, and 54% are non-Hispanic white.
Gatorade, 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 in 2000 as part of the $13 billion acquisition of Quaker Oats Company.

Powerade, a division of The Coca-Cola Company, holds the number two market position in the segment, with a 13% marketshare.

*State Of The Beverage Market 2015* reported sports drink market leaders as follows (change from prior year in parenthesis):

- Gatorade Perform: $3.18 billion (1.3%)
- Powerade ION4: $775 million (-11.1%)
- Gatorade Frost: $451 million (14.7%)
- Gatorade G2 Perform: $390 million (-19.2%)
- Gatorade: $219 million (44.2%)
- Powerade: $202 million (77.4%)
- Powerade Zero ION4: $192 million (-1.2%)
- Gatorade Fierce: $182 million (735.1%)
- Gatorade G2: $42 million (-2.6%)
- Gatorade X Factor: $28 million (9.9%)
- Gatorade All Stars: $22 million (109.6%)
- Powerade Zero: $19 million (-8.0%)
- Private label: $15 million (-12.7%)
- BodyArmor: $14 million (62.1%)
- Honest Ade: $7 million (-9.1%)

### 84.3 Protein Drinks

Euromonitor (www.euromonitor.com) assessed the 2014 ready-to-drink (RTD) protein market at $550 million, a 24% increase over the prior year. The market is projected to increase 50%, to $825 million, by 2018.

“Consumers are increasingly looking for beverages to deliver more than just taste and refreshment; namely, some kind of functionality. Within functional drinks, the new ‘it’ ingredient is protein.”

*State Of The Beverage Market 2015*

*Beverage World, 5/15*
State Of The Beverage Market 2015 reported the refrigerated protein drink market leaders as follows (change from prior year in parenthesis):

- Bolthouse Farms Protein Plus: $60.3 million (31.2%)
- Shamrock Farms Rockin’ Refuel: $13.1 million (49.4%)

84.4 Functional Water
Appealing to health-conscious consumers, numerous functional water products have been introduced. The following are some of these products:

- Almond Water (Victoria’s Kitchen, www.drinkvictoriaskitchen.com)
- Birch-Tree Water (Byarozavik, www.byarozavik.com)
- Cactus Water (Caliwater, www.drinkcaliwater.com)
- Flower Water (Blossom Water, www.drinkblossomwater.com)
- Maple Water (Drink Maple, www.drinkmaple.com)
- Rose Water (Botanic Water, www.botanicwater.com)
- Turmeric Water (Temple Turmeric, www.templeturmeric.com)
- Watermelon Water (WTRMLM WTR, www.wtrmlnwtr.com)

“Coconut water, the trendy sports drink that’s exploded into a $400 million-a-year business in the U.S., has new competition. Bottled-water outfits are trying to sell consumers on H2O with vegetables, tree saps, and other flavored ingredients. Startups and small companies especially are marketing a raft of new products spiked with a little extra.”

Time, 4/13/15

84.5 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.
“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*

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).

The market is in its infancy, with total annual sales estimated at less than $50 million.

### 84.6 Drinkable Meals

Hybrid food/drink products, dubbed drinkable meals, have become popular among high-tech workers in Silicon Valley.

“Those poor coders in Silicon Valley don’t even have the time to get up from their workstations to grab a sandwich. No, thousands of them are instead reaching for powdered drink concoctions that they whip up in minutes and that they claim provide them with all the sustenance they need. *The New York Times* first took notice of the trend about a year ago.”

*Beverage World*, 6/15
Soylent (www.soylent.com), the first and most popular among meal replacement products, was created by a California entrepreneur, supposedly because he thinks eating is an inefficient use of time. Ambronite (www.ambronite.com) followed in the marketplace and, in July 2014, set the all-time record for crowdfunding food products, with over $97,000. Soylent is made of powdered supplements; Ambronite is an all-natural, organic meal-drink that uses pulverized real-food ingredients.

Other drinkable meal products include People Chow (www.people-chow.com), Schmilk (http://superbodyfuel.com/shop/schmilk), and Schmoylent (http://superbodyfuel.com/shop/schmoylent).

Recently, Nestlé revealed that it was developing a means to craft personalized nutrient combinations, potentially through a Nespresso-like machine that produces drinkable meal supplements.
85.1 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.

Canadean (www.canadean.com) reports the 100% juice share of the total liquid refreshment beverage market dropped from 6.5% in 2011 to 6.0% in 2014.

“Within the U.S. market, the juice segment has seen its volume decline as it has faced increased competition from other beverage categories with health and wellness positioning. The more traditional juice segments like cranberry, apple, and orange juice have experienced either flat or decreasing sales. However, there is ongoing innovation and new product development in super-premium juices as well as cold-pressed fruit juices and vegetable juice smoothies.”

State Of The Beverage Market 2015
Beverage World, 5/15
85.2 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.

*State Of The Beverage Market 2015, by Beverage World*, reported retail juice sales as follows (change from prior year in parenthesis):
- Shelf-stable juice: $6.88 billion (-0.1%)
- Refrigerated juice: $6.61 billion (-1.1%)

Sales by segment were as follows (change from prior year in parenthesis):

**Shelf-Stable**
- Cranberry juice: $1.00 billion (0.6%)
- Apple juice: $ 914 million (-1.2%)
- Tomato/vegetable juice: $ 433 million (1.4%)
- Lemonade: $ 306 million (6.4%)
- Grape juice: $ 280 million (-6.6%)
- Orange juice: $ 274 million (-0.5%)
- Lemon/lime juice: $ 176 million (6.4%)
- Sparkling juice: $ 132 million (2.6%)
- Cider: $ 115 million (2.6%)
- Prune/fig juice: $ 112 million (3.3%)
- Cherry juice: $ 53 million (5.6%)
- Grapefruit juice: $ 42 million (-8.3%)
- Juice smoothies: $ 36 million (-17.8%)
- Pineapple juice: $ 35 million (17.9%)
- Fruit nectar: $ 13 million (-11.3%)
- Aloe vera juice: $ 4 million (-14.4%)

**Refrigerated**
- Orange juice: $3.32 billion (-3.6%)
- Juice and drink smoothies: $ 821 million (7.9%)
- Lemonade: $ 572 million (6.2%)
- Blended juice: $ 390 million (1.9%)
- Tomato/vegetable: $ 100 million (42.0%)
- Grapefruit juice: $ 82 million (-2.9%)
- Apple juice: $ 63 million (2.0%)
- Fruit nectar: $ 14 million (-2.0%)
- Grape juice: $ 6 million (-38.9%)
- Lemon/lime juice: $ 4 million (-27.7%)
- Cranberry juice: $ 2 million (-0.2%)
85.3 Market Leaders

According to IRI, the following are the leading orange juice brands sold at supermarkets, drug stores, convenience stores, and mass merchandisers:

- 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

85.4 RTD Juice and Smoothies

According to State Of The Beverage Market 2015, by Beverage World, RTD juice and smoothie market leaders are as follows:

- Naked: $451 million
- Bolthouse Farms: $190 million
- Naked Protein Zone: $72 million
- Odwalla Superfood: $28 million
- Odwalla: $12 million
- Odwalla C Monster: $11 million
- Bolthouse Farms C Boost: $11 million
- Naked Superfood: $11 million
- Suja Essential: $5 million
- Florida’s Natural: $4 million
86

COFFEE

86.1 Consumption

Americans consumed approximately 7.2 billion gallons of coffee in 2015.

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, by the National Coffee Association (NCA, www.ncausa.org). Thirty-one percent (31%) of adults drink gourmet coffee daily.

There are more U.S. consumers who drink coffee daily than there are soft drink consumers (51%).

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.

The Specialty Coffee Association of America (www.scaa.org) estimates the U.S. coffee market at $48 billion dollars, with specialty comprising approximately 48% volume share but nearly 55% value share.

According to IRI (www.iriworldwide.com), annual coffee sales in supermarkets, drug stores, and mass merchandisers in 2014 were $8.27 billion.

86.2 Consumption Demographics

National Coffee Drinking Trends 2015 reports the percentages of adults that consume coffee each day as follows:

Age
• 18-to-24: 45%
• 25-to-39: 57%
• 40-to-59: 62%
• 60 and older: 65%
Ethnicity

- Hispanic-American: 69%
- Caucasian: 59%
- Asian-American: 56%
- African-American: 47%

While older adults consume more coffee at home, younger adults are more likely to do so out-of-home. National Coffee Drinking Trends 2015 reports 46% of those ages 18-to-39 drink coffee while away from home each day; 35% of adults age 40 and older do so.

86.3 At-Home Consumption

Seventy-three percent (73%) of coffee consumed in the U.S. is prepared at home, according to the NCA. The single-cup brewing format continues to grow steadily. Twenty-seven percent (27%) of U.S. households used a single-cup brewer in 2015, an increase from 15% that did so in 2014. So popular are the machines that they are influencing overall coffee demand in the U.S.

“Single-serve brewing machines are altering the way coffee is consumed, and not in a good way. For coffee producers, the problem with single-serve machines is their efficiency. That means fewer people brew big pots of coffee and dump what they don’t drink, hurting sales.”

Bloomberg Businessweek, 4/15/15

Keurig Green Mountain, the primary manufacturer of single-serve brewing machines, estimates 20 million of its brewers are in use in the U.S. Daily consumption of a coffee made in a drip coffee maker has dropped to 37% from 43% in 2010.

86.4 RTD Coffee

According to IRI (www.iriworldwide.com), retail sales of RTD coffee were $1.38 billion in 2014, an 11.1% increase from the prior year. Marketshare leaders sales were as follows (change from previous year in parenthesis):
• Starbucks Frappuccino: $835.0 million (9.9%)
• Starbucks Doubleshot: $398.2 million (13.1%)
• Starbucks Cappucino: $ 77.5 million (10.0%)
• Starbucks Frappuccino Light: $ 26.1 million (-1.2%)
• Starbucks Doubleshot Light: $ 11.2 million (10.3%)
• Illy Issimo: $ 7.5 million (71.4%)
• Coco Cafe: $ 7.2 million (46.0%)

86.5 Coffeeshops
Coffeeshops are assessed in Chapter 27.

86.6 Artisan Roasters
Artisan coffee roasters are part of the ‘third wave’ coffee movement, following commercial roasters (i.e. Folgers, Maxwell House, etc.) and coffeeshops. Their mission is to provide the consumer with the beans to brew high-quality coffee at home. Most roasters also operate coffeeshops.

Among more than 500 roasters in the U.S., the largest are Blue Bottle Coffee Company (Oakland, CA), Counter Culture Coffee (Durham, NC), Intelligentsia Coffee (Chicago, IL), La Colombe (Philadelphia, PA), and Stumptown Coffee Roasters (Portland, OR). *Bloomberg Businessweek* reports annual sales of Counter Culture Coffee, the only independent of the five, at $25 million. Peet’s Coffee & Tea acquired Intelligentsia and Stumptown in 2015.

“Together, these [five] roasters now operate 57 cafes in 9 cities, and they’re beginning to put pressure on Starbucks.”

*Bloomberg Businessweek*, 1/11/16

86.7 Market Resources

Specialty Coffee Association of America, 117 W. 4th Street, Suite 300, Santa Ana, CA 92701. (562) 624-4100. ([www.scaa.org](http://www.scaa.org))
# TEA

## 87.1 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. *Nation’s Restaurant News* placed the market significantly higher, at $40 billion.

*State of the U.S. Tea Industry*, published in 2015 by the Tea Association of the USA (www.teausa.com), estimated the U.S. wholesale tea market at $10.8 billion, distributed as follows:

- Ready-to-drink (RTD): $5.2 billion
- Retail: $2.5 billion
- Specialty segment: $1.9 billion
- Foodservice: $1.2 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 (www.iriworldwide.com), sales of bag and loose tea in supermarkets, drug stores, and mass merchandisers in 2014 were $1.22 billion. Mintel (www.mintel.com) estimated 2014 retail sales of tea and RTD tea at $7.3 billion, with 19.8% growth from 2009 to 2014. Growth is forecast at 16.8% for 2014 to 2019.

The U.S. imports approximately 300 million pounds of tea annually, according to the Tea Association of the USA.
“Consumer desire for better-for-you beverage options in convenient formats has driven the tea category in the last few years. Retail volume of hot-brewed tea in the U.S. has been flat or declining in the past two years, however, consumer preference for healthier, higher-value brands enabled the segment to gain 3% in sales last year.”

2015 State of the Beverage Industry
Beverage Industry, 7/13/15

### 87.2 RTD Tea

Volume sales of ready-to-drink tea in the U.S. increased 25% during the five-year period from 2009 to 2014, from 1,242 million gallons to 1,584 million gallons, according to Beverage Marketing Corporation (www.beveragemarketing.com). Dollar sales grew more than 30% from $3.83 billion to $5.20 million.

According to IRI, retail sales of RTD tea were $3.21 billion in 2014, a 6.1% increase from the prior year. Marketshare leaders sales were as follows (change from previous year in parenthesis):

- AriZona: $666.0 million (1.0%)
- Lipton Pureleaf: $442.1 million (42.2%)
- Lipton Brisk: $349.4 million (2.3%)
- Lipton: $302.1 million (19.0%)
- AriZona Arnold Palmer: $214.0 million (-6.3%)
- Snapple: $208.4 million (-1.0%)
- Lipton Diet: $199.1 million (-10.0%)
- Diet Snapple: $181.6 million (-5.0%)
- Gold Peak: $172.1 million (26.1%)
- Peace Tea: $71.3 million (-13.0%)
- Fuse: $64.8 million (-3.0%)
- Private label: $60.2 million (-2.0%)
“Many younger consumers today are choosing lower-calorie, all-natural beverage options. Combine that with natural sources of energy, and it is a home run. That is just how RTD tea brands have been shifting in recent years: to less calories and more all-natural formulations, with a growing number even crossing into the energy category by touting energizing ingredients.”

State Of The Beverage Market 2015
Beverage World, 5/15

87.3 Tea Stores and Tea Bars
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.

“[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
The Coffee Bean & Tea Leaf operates over 1000 self-owned and franchised stores in the U.S. and 24 countries.

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+ U.S. locations.

87.4 Market Resources
Tea Association of the USA, 362 Fifth Avenue, Suite 801, New York, NY 10001. (212) 986-9415. (www.teausa.com)
BOTTLED WATER

88.1 Consumption and Spending

The *2015 Economic Impact of the Bottled Water Industry*, by the International Bottled Water Association (IBWA, www.bottledwater.org), reported annual sales of bottled water at $12.2 billion; 10.0 billion gallons of bottled water are consumed annually.

Canadean (www.canadean.com) assesses bottled water consumption and sales growth as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Consumption Growth</th>
<th>Sales Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>6.9%</td>
<td>7.3%</td>
</tr>
<tr>
<td>2013</td>
<td>0.5%</td>
<td>2.0%</td>
</tr>
<tr>
<td>2014</td>
<td>7.2%</td>
<td>5.6%</td>
</tr>
</tbody>
</table>

According to Beverage Marketing Corporation (www.beveragemarketing.com), per capita consumption of bottled water has been as follows:

- 2009: 27.6 gallons
- 2010: 28.3 gallons
- 2011: 29.2 gallons
- 2012: 30.8 gallons
- 2013: 32.0 gallons
- 2014: 33.2 gallons

“The bottled water category has benefitted from the backlash against carbonated soft drinks, offering consumers a refreshing beverage option with zero calories.”

*Beverage World*

Bottled water sales in supermarkets, drug stores, and mass merchandisers are $8.5 billion, 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).

### 88.2 Consumption Demographics

According to International Demographics (www.themediaaudit.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%

### 88.3 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

*State Of The Beverage Market 2015*, by *Beverage World*, reported market leaders as follows (change from prior year in parenthesis):

**Bottled Water**

- Private label: $1.99 billion (6.9%)
- Dasani: $989 million (5.0%)
- Aquafina: $928 million (6.4%)
• Nestlé Pure Life: $913 million (1.0%)
• Glacéau Smartwater: $653 million (17.9%)
• Poland Spring: $573 million (1.8%)
• Glacéau Vitaminwater: $510 million (-9.5%)
• Deer Park: $420 million (3.8%)
• Ozarka: $343 million (9.1%)
• Fiji: $258 million (6.3%)

**Sparkling Water**
• Sparkling Ice: $371 million (25.8%)
• Private label: $285 million (10.0%)
• Perrier: $176 million (12.4%)
• San Pellegrino: $105 million (10.2%)
• La Croix: $95 million (28.3%)
• Glacéau Fruitwater: $44 million (3.1%)
• Topo Choice: $38 million (19.4%)
• Schweppes: $31 million (98.9%)
• Poland Spring: $28 million (8.5%)
• Arrowhead: $24 million (14.3%)

### 88.4 Market Resources
International Bottled Water Association, 1700 Diagonal Road, Suite 650, Alexandria, VA 22314. (703) 683-5213. [www.bottledwater.org](http://www.bottledwater.org)
89.1 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) reports dairy product consumption (pounds per person) in 2014, and, for comparison, five and 10 years prior, as follows:

<table>
<thead>
<tr>
<th>Product</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fluid milk</td>
<td>186.0</td>
<td>178.0</td>
<td>159.0</td>
</tr>
<tr>
<td>Yogurt</td>
<td>9.2</td>
<td>12.5</td>
<td>14.9</td>
</tr>
<tr>
<td>Butter</td>
<td>4.5</td>
<td>5.0</td>
<td>5.5</td>
</tr>
<tr>
<td>Ice cream</td>
<td>14.7</td>
<td>14.0</td>
<td>12.8</td>
</tr>
<tr>
<td>Cheese (all types)</td>
<td>33.7</td>
<td>34.7</td>
<td>36.0</td>
</tr>
<tr>
<td>Evaporated and condensed milk</td>
<td>5.5</td>
<td>7.3</td>
<td>6.8</td>
</tr>
<tr>
<td>Dry milk products</td>
<td>8.1</td>
<td>7.0</td>
<td>5.8</td>
</tr>
</tbody>
</table>

Total farm milk production in 2014 in the U.S. was 206.0 billion pounds; production was up 1.4% during the first three quarters of 2015.

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.

89.2 Consumer Spending

According to IRI (www.iriworldwide.com), annual milk sales in supermarkets, drug stores, and mass merchandisers in 2014 were $15.65 billion.

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.

### 89.3 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%

### 89.4 Dairy Alternatives

*Soy & Almond Milk Production in the US: Market Research Report*, published in 2015 by IBISworld (www.ibisworld.com), estimated annual sales of soy milk and almond milk at $1.0 billion, with a 7.2% average annual growth rate for 2010 through 2015. Almond milk, which displaced soy milk as the marketshare leader in the segment in 2013, garners 65.5% of sales.

Rice milk and coconut milk rank third and fourth, respectively, in the dairy alternative segments, each with a 3% to 5% marketshare.

Quinoa, lupine, peas, peanuts, cashews, and sesame seeds are used to make plant-based milks in countries overseas and possibly might enter the U.S. market.

### 89.5 Market Resources


90.1 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 in 2015 are estimated at $219.7 billion; beverage sales accounted for approximately $46.1 billion. At quick-service restaurants, beverages account for approximately 4% of the average customer check. Of the $201.1 billion in estimated total sales in 2015, quick-service restaurants are projected to sell an estimated $8.0 billion in beverages. These figures do not include beverage sales at bars and taverns or snack bars.

According to Technomic (www.technomic.com), sales of spirits, wine, and beer in restaurants, bars, and other licensed on-premise locations were approximately $110 billion. Adult beverage on-premise spending is increasing at about 5% per year. The Beverage Consumer Trend Report, by Technomic, reported that 71% of adults purchase beverages away from home at least twice a week.

A survey by Mintel (www.mintel.com) found that 44% of full-service restaurant customers had ordered a cocktail in the prior three months.

There are approximately 400,000 on-premise licensed locations serving alcoholic beverages in the U.S.

90.2 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: 24.2 billion
- Iced tea: 5.4 billion
- Diet carbonated soft drinks: 4.2 billion
- Traditional coffee: 3.5 billion
- Bottled water: 2.7 billion
- Milk: 2.5 billion
- Specialty coffee: 2.4 billion
- Non-carbonated soft drinks: 2.0 billion
- Juice: 1.9 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

Declines in consumption of carbonated soft drinks, brewed coffee, and milk, which account for nearly 50% of all beverages ordered at foodservice, have driven an overall drop in beverage servings at restaurants.

“Although consumers order a beverage 70% of the time when visiting restaurants and other foodservice outlets, beverage orders have declined 4% or 2 billion servings over a five year period. Consumers changing tastes and cost consciousness are behind declines. Iced/frozen coffee, specialty coffee, tap water, and bottled water top the list of growing beverages.”

The NPD Group, 10/13/15

90.3 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 orders 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.”

Technomic

According to The NPD Group, on-premise servings of alcoholic beverages are distributed as follows:

<table>
<thead>
<tr>
<th></th>
<th>Bars</th>
<th>Casual-Dining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beer</td>
<td>54%</td>
<td>50%</td>
</tr>
<tr>
<td>Cocktails</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>Wine</td>
<td>12%</td>
<td>18%</td>
</tr>
</tbody>
</table>

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.

90.4 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, Taco Bell, and White Castle have offered beer at a few locations but have not expanded the offering chain-wide.

Starbucks had 70 locations serving alcohol in 2015 and plans to have 2,000 by 2020.

Several fast-casual restaurants chains offer alcoholic beverage service. Chipotle Mexican Grill serves beer and margaritas at most of its 1,775 locations. Noodles & Company, a 439-unit chain, sells beer and wine. Moe’s Southwest Grill sells beer and wine at about 70 of its 581 units. Smashburger serves beer at more than 90% of its 288 U.S. locations. Baja Fresh Mexican Grill (171 locations) and Qdoba Mexican Grill (634 locations) serve beer and wine at some of their restaurants but have discontinued this service at others.

While beverage service is well-received by customers at fast-casual chains, Technomic estimates that even the most successful locations generate only about 5% of sales from alcoholic beverages.

One barrier to increasing beer sales at fast-casual restaurants is that most customers are reluctant to get back in line for a second drink. Zpizza has installed self-service beer technology at some of its California locations. Customers scan their IDs, open a digital tab, and then pour their own draft beer, paying by the fluid ounce. At tap room locations, alcohol sales are up to 20% of sales. Zpizza tap room locations see about 75% of sales from dine-in customers; traditional locations are about 75% takeout and delivery.

_________________________________________________________________
“Zpizza may have cracked the code on boosting alcohol sales in the fast-casual segment by putting bartending in the hands of customers.”

Nation’s Restaurant News, 12/14/15

_________________________________________________________________
90.5 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

90.6 Edible Cocktails
Edible cocktails have become popular in the U.K.; the trend is migrating to the U.S. What’s Hot In 2015, by the National Restaurant Association (www.restaurant.org), pointed to edible cocktails as a growing trend.

“When is a drink not a drink? Edible cocktails are all the rage. Basically, they are drinks you can eat or beverages that “distort the boundaries of food and drink”. From “cuptails”, to jelly shots, nitro meringues to dollops of boozy ice-cream floating in your fizz, cocktails are being reworked in new, munchable ways.”

The Guardian, 12/11/15
90.7 Beverage Trends 2016

Andrew Freeman, president of Andrew Freeman & Co. (www.afandco.com), identified the following trends for bars and restaurants in 2016:

- Restaurants and bars across the country are getting creative with kombucha. They’re incorporating the trendy fermented tea beverage into cocktails to create more botanical and fruitful alcoholic beverages and developing new twists, such as the Kombucharita.
- Restaurants and breweries are introducing their own house-made sodas and producers are creating their own alcoholic and non-alcoholic brews by infusing them with ginger and other botanical flavors.
- Growth in demand for mocktails is anticipated.

“Mocktail offerings are popping up all over U.S. food cities from San Francisco to New York. They target consumers watching their diets, designated drivers, pregnant women and even foodie children. Some chefs have experimented with pairing an entire meal with mocktails. This gives them a unique opportunity to blend ingredients that complement the food without the overpowering strength of alcohol – or the cost.”

Andrew Freeman, President
Andrew Freeman & Co.
Cheers, 1/12/16

- Nitro-coffee cocktails are beginning to evolve as a popular morning drink with the increasing popularity of nitro-coffee. Coffeeshops and restaurants are expanding on the trend, incorporating coffee into alcoholic drinks and non-alcoholic coffee beverages by infusing new techniques and flavors to create balanced coffee drinks.
- Martinis and gin-and-tonics will never go out of style, but bartenders are putting a creative spin on the old-school drinks with barrel-aged gins on the rise. Aged in whiskey, brandy, or rum barrels, these gins are infused with tastes of botanicals and sweetened with hints of vanilla, maple and brown sugar. They’re easy to sip and the perfect complement in any number of cocktails.
• Tropical cocktails are making their way back into the mainstream. Umbrella-decorated drinks are on the rise and are bringing a little more flair to the glass.
• Pairing wine with food is a long-standing tradition, but this concept has been refreshed with cocktails. Bartenders are creating drinks with flavors specifically designed to complement dishes, and operators are developing pairings for multicourse meals.
• Boozy ice cubes help keep a glass cold and the drink strong, and spiked popsicles are a fun adult indulgence. The Beyond Zero icemaker, a new innovation that freezes alcohol, is putting a cool spin on favorite cocktail drinks, making it easy to turn them into delicious frozen treats.
• Instagram-worthy garnishes, from gold-dusted flowers, dehydrated fruits, sugar stirrers and designer straws, are growing in popularity.
• Bloody Marys have always been popular and there are an increasing number of creative presentations of this fan-favorite. From inventive garnishes and new components to tableside carts at posh brunch spots throughout the country, Bloody Marys continue to evolve.
• With consumers looking for healthier, less-sweet food and drink alternatives, many are turning to green beverages. Sales of matcha, a powdered green tea with a hint of sweetness and many health benefits, were up 55% in 2015.
• More restaurants and wineries are now offering wines on tap as an innovative and effective way to pour wine. Rather than going through the traditional process of popping open a stubborn cork, pouring from tap helps to keep things moving, plus the ability to keep the wine in kegs increases preservation time.
• White wine – particularly the moderately oaked variety – will continue to increase in popularity. Even traditional red wine drinkers are now exploring more white wines.
PART XII: AWARD WINNERS
CLEAN PLATE AWARDS

91.1 Overview
Since 2007, Restaurant Business has invited notable chefs and restauranteurs to select their favorite plates at restaurants across the United States. The annual Clean Plate Awards are based on the selections.

91.2 Award Recipients 2015
In 2015, the Clean Plate Awards were as follows:
• BBQ Shrimp, W.H. Stiles Fish Camp, Ponce City Market (Atlanta, GA)
• Berkshire Pig Head Carnitas, CBD Provisions (Dallas, TX)
• Brisket Frito Pie, La Barbecue (Austin TX)
• Calves Liver with Sauteed Onions, Al Biernat’s (Dallas, TX)
• Catfish Salad, Lan Larb (New York, NY)
• Cubana, Xoco (Chicago, IL)
• Deconstructed Latte, Indaba Coffee (Spokane, WA)
• Doughnuts, Twin Peaks Coffee & Donuts (Tannersville, NY)
• Famous Ferdi Special, Mother’s Restaurant (New Orleans, LA)
• Filet Mignon, Empire Steak House (New York, NY)
• Fried Chicken, Willie Mae’s Scotch House (New Orleans, LA)
• Fusilli in Cartoccio, Roberto’s Restaurant (Bronx, NY)
• Langoustines, Costa di Mare at the Wynn Hotel (Las Vegas, NV)
• Maytag Blue Cheese Potato Chips, Jasper’s (Plano TX)
• Mimi’s Fried Chicken, Jasper’s (Plano, TX))
• Momotaro Tartare, Momotaro (Chicago, IL)
• Original Cheddar Fries, Snuffer’s Restaurant & Bar (Dallas, TX)
• Roasted Marrow Bones, Brasserie Ten Ten (Boulder, CO)
• Seared Diver Scallops, Girl & The Goat (Chicago, IL)
• Smoked Meat Croquettes, Joe Beef (Montreal, PQ, Canada)
• Temaki, KazuNori (Los Angeles, CA)
• Tortilla Soup, Fearing’s Restaurant at The Ritz-Carlton (Dallas, TX)
• Vegan Chicarrones Locos, El Rey Coffee Bar & Luncheonette (New York, NY)
91.3 Recent Awards

The following menu items were selected for Clean Plate Awards in 2013 and 2014:

• Ahi Yakusugi, Momotaro (Chicago, IL)
• Artisan Cheese Plate with Castelfranco radicchio “ham,” Meadowood (St. Helena, CA)
• Beef on tasting menu, Eleven Madison Park (New York, NY)
• Beijing Duck Feast, Sun Wah BBQ (Chicago, IL)
• Biscuits, Sweet Cheeks Q (Boston, MA)
• Bolognese sandwich on rye with onions, Eisenberg’s Sandwich Shop (New York, NY)
• Boudin Noir, Parachute (Chicago, IL)
• Burger and frozen custard, Shake Shack at JFK Airport (New York, NY)
• Cauliflower T-Bone, Superba Snack Bar (Venice, CA)
• Chicken and dumplings, Reserve Wine & Food (Grand Rapids, MI)
• Coconut rose water cake, Lantern (Chapel Hill, NC)
• Eel Pie with broccoli ice cream, radish and grilled broccoli, Le Pigeon (Portland, OR)
• Eggplant and Ricotta Casoncelli with veal ragu, Lula Cafe (Chicago, IL)
• Filet of beef steak, Quality Meats (New York, NY)
• Fried Brussels sprouts, The Radler (Chicago, IL)
• Fried hen-of-the-woods mushrooms, Elizabeth Restaurant (Chicago, IL)
• Hamachi crudo, qui (Austin TX)
• Kimchee Bokkum, Ban Po Jung (Chicago, IL)
• Maple-Bacon Doughnut, Dutch Monkey Doughnuts (Cumming, GA)
• Mapo Dofou, Xiao Bao Biscuit (Charleston, SC)
• Meatloaf sandwich on brioche, Gjelina Take Away (Long Beach, CA)
• Mini Wafels, Wafels & Dinges (New York, NY)
• Omakase Menu, Zuma at Epic Hotel (Miami, FL)
• Oysters, Rappahannock Oyster Co. (Washington, DC)
• Peking duck, Decoy (New York, NY)
• Portobello Fries, Bottega Louie (Los Angeles)
• Pozole Rojo, Dove’s Luncheonette (Chicago, IL)
• Preserved vegetables, buckwheat, marrow and dried beef, Bar Tartine (San Francisco, CA)
• Ramen, Yusho (Chicago, IL)
• Seasonal pizza, Napolese (Indianapolis, IN)
• Spinach Chickpea Cazuela with cumin and roasted garlic, Barcelona Wine Bar & Restaurant (Atlanta, GA)
• Tiradito, Matsuhisa (Los Angeles, CA)
• Tortillas, Cosme (New York, NY)
• Uovo in Raviolo, SD26 (New York, NY)
• Wise Guy Pizza, Freds at Barneys (New York, NY)
CONSUMER PICKS

92.1 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 April 2015 and presented online at http://nrn.com/industry-data/consumer-picks. The brand rankings are presented in this chapter.

92.2 Favorites By Segment
The top restaurant brands by segment are as follows:
Casual-Dining
1. The Melting Pot
2. Cheddar’s Casual Cafe
3. The Cheesecake Factory
4. Bonefish Grill
5. Carrabba’s Italian Grill
6. P.F. Chang’s China Bistro
7. Romano’s Macaroni Grill
8. Texas Roadhouse
9. Olive Garden Italian Restaurant
10. LongHorn Steakhouse
11. (tie) Famous Dave’s
11. (tie) O’Charley’s
13. BJ’s Restaurant & Brewhouse
14. Red Lobster
15. (tie) Genghis Grill
15. (tie) Joe’s Crab Shack
17. Chevys Fresh Mex
18. Johnny Carino’s/Carino’s Italian
19. Red Robin Gourmet Burgers
20. California Pizza Kitchen
21. Lone Star Steakhouse
22. (tie) Hard Rock Cafe
22. (tie) Old Chicago Pizza & Taproom
24. Wotback Steakhouse
25. (tie) Uno Chicago Grill/Pizzeria Uno
25. (tie) Ninety Nine Restaurant & Pub
27. TGI Fridays
28. Buca di Beppo
29. Mellow Mushroom Pizza Bakers
30. Logan’s Roadhouse
31. Sunny’s Real Pit Bar-B-Q
32. (tie) Applebee’s Neighborhood Grill & Bar
32. (tie) Mimi’s Cafe
34. One the Border Mexican Grill & Cantina
35. Dave & Buster’s
36. Chili’s Grill & Bar
37. Ruby Tuesday
38. Beef ‘O’ Brady’s
39. Buffalo Wild Wings Grill & Bar
40. Hooters

Family-Dining
1. First Watch
2. Cracker Barrel Old Country Store
3. The Original Pancake House
4. Bob Evans Restaurants
5. IHOP
6. Village Inn
7. Johnny Rockets
8. Big Boy
9. Huddle House
10. (tie) Shoney’s
10. (tie) Coco’s Bakery Restaurant
12. Shari’s Cafe and Pies
13. Perkins Restaurant & Bakery
14. Denny’s
15. Friendly’s
16. Waffle House

**Fine-Dining**
1. Ruth’s Chris Steak House
2. Morton’s The Steakhouse
3. The Capital Grill
4. McCormick & Schmick’s
5. Fleming’s Prime Steakhouse & Wine Bar

**Limited-Service**
1. In-N-Out Burger
2. Brewster’s Real Ice Cream
3. Ben & Jerry’s
4. Chick-fil-A
5. Häagen-Dazs
6. Rubio’s Fresh Mexican Grill
7. Tropical Smoothie Cafe
8. Marble Slab Creamery
9. (tie) Papa Murphy’s Take ‘N’ Bake
9. (tie) Penn Station East Coast Subs
11. Sarku Japan
12. (tie) McAlister’s Deli
12. (tie) Rita’s Italian Ice
14. Red Mango
15. Charley’s Grilled Subs
16. (tie) Potbelly Sandwich Shop
16. (tie) Caribou Coffee
16. (tie) Panera Bread
19. Schlotsky’s Deli
20. Raising Cane’s Chicken Fingers
21. (tie) Krispy Kreme Doughnuts
21. (tie) Jason’s Deli
21. (tie) Culver’s
24. Which Wich
25. Peet’s Coffee & Tea
26. Smoothie King
27. Chipotle Mexican Grill
28. Cold Stone Creamery
29. Corner Bakery Cafe
30. Pei Wei Asian Diner
31. Souplantaton/Sweet Tomatoes
32. Godfather’s Pizza
33. (tie) Hungry Howie’s Pizza
33. (tie) Steak ‘n Shake
35. Togo’s
36. (tie) Jet’s Pizza
36. (tie) Carvel
36. (tie) Fuddruckers
39. Jamba Juice
40. Mrs. Fields Cookies
41. (tie) Braum’s Ice Cream and Dairy Stores
41. (tie) Firehouse Subs
43. Jimmy John’s Gourmet Sandwiches
44. Noodles & Company
45. Sizzler
46. Zaxby’s
47. (tie) Baja Fresh Mexican Grill
47. (tie) Baskin-Robbins
49. Smashburger
50. Golden Corral
51. Marco’s Pizza
52. Ponderosa/Bonanza Steakhouse
53. Wingstop
54. Jersey Mike’s Subs
55. Round Table Pizza
56. Cinnabon
57. Ryan’s
58. Dickey’s Barbeque Pit
59. (tie) Qdoba Mexican Grill
59. (tie) Einstein Bros. Bagels
61. Great American Cookies
62. Blimpie America’s Sub Shop
63. Fazoli’s
64. Bojangles’ Famous Chicken ‘n Biscuits
65. Five Guys Burgers & Fries
66. Rally’s Hamburgers
67. Starbucks Coffee
68. Boston Market
69. Au Bon Pain
70. Bruegger’s Bagels
71. Captain D’s Seafood Kitchen
72. Moe’s Southwest Grill
73. El Pollo Loco
74. Quiznos
75. (tie) Papa John’s Pizza
75. (tie) Subway
77. Whataburger
78. (tie) Old Country Buffet
78. (tie) Popeye’s Louisiana Kitchen
80. Pizza Hut
81. Sonic America’s Drive-In
82. Checkers
83. Home Town Buffet
84. Orange Julius
85. White Castle
86. Del Taco
87. (tie) Domino’s
87. (tie) Taco John’s
89. Carl’s Jr.
90. CiCi’s Pizza
91. (tie) A&W Restaurants
91. (tie) Tim Hortons
93. Church’s Chicken
94. Dairy Queen
95. Panda Express
96. (tie) Wendy’s
96. (tie) Long John Silver’s
98. Auntie Anne’s
99. Arby’s
100. Hardee’s
101. Taco Bell
102. Jack in the Box
103. Little Caesars Pizza
104. Dunkin’ Donuts
105. Sbarro
106. KFC
107. Wienerschnitzel
108. Krystal
109. Burger King
110. McDonald’s
111. Chuck E. Cheese’s

92.3 Market Resources
WD Partners, 7007 Discovery Boulevard, Dublin, OH 43017. (614) 634-7000.
(www.wdpartners.com)
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CONSUMERS’ CHOICE AWARDS

93.1 Overview
Technomic (www.technomic.com) presents annual Chain Restaurant Consumers’ Choice Awards. The awards were first presented in 2013. The 2015 awards were based on surveys following 80,000 restaurant visits where consumers rated 120 restaurant chains on more than 60 different attributes.

93.2 Award Winners 2015

Availability of Healthy Options
• Quick-service: Jamba Juice
• Fast-casual: Jason’s Deli
• Full-service: Seasons 52

Intent to Recommend
• Quick-service: Papa Murphy’s
• Fast-casual: Raising Cane’s Chicken Fingers
• Full-service: Cheddar’s

Pleasant, Friendly Service
• Quick-service: Chick-fil-A
• Fast-casual: McAlister’s Deli
• Full-service: Cracker Barrel Old Country Store

Unique Menu Items
• Quick-service: Cold Stone Creamery
• Fast-casual: Zaxby’s
• Full-service: The Cheesecake Factory

Welcoming, Comfortable Atmosphere
• Quick-service: Caribou Coffee
• Fast-casual: Firehouse Subs
• Full-service: Maggiano’s Little Italy
93.3 Market Resources
Technomic, Inc., 300 South Riverside Plaza, Suite 1200 South, Chicago, IL 60606.
(312) 876-0004. (www.technomic.com)
94.1 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.

In 2015, Open Table designated Diners Choice Awards based more than five million reviews of more than 20,000 restaurants across the United States.

94.2 Best Restaurant
The following are the winners of the 2015 Diners’ Choice Award for Best Overall Restaurant:

• Acquerello (San Francisco, CA)
• Addison Restaurant (San Diego, CA)
• Afternoon Tea - The Phoenician (Scottsdale, AZ)
• Ambience (Los Altos, CA)
• Arethusa al Tavolo (Bantam, CT)
• Arroyo Vino (Santa Fe, NM)
• Artisanal Restaurant (Banner Elk, NC)
• Atera (New York, NY)
• Auberge du Soleil (Rutherford, CA)
• Bacchanalia (Atlanta, GA)
• barmini by José Andrés (Washington, DC)
• Bavettes (Chicago, IL)
• Benu (San Francisco, CA)
• Blue Hill at Stone Barns (Pocantico Hills, NY)
• Boka (Chicago, IL)
• Bones (Atlanta, GA)
• Bouchard Restaurant and Inn (Newport, RI)
• Bouley (New York, NY)
• Cafe Juanita (Kirkland, WA)
• Cafe Monarch (Scottsdale, AZ)
• Cafe Provence (Prairie Village, KS)
• Carlos’ Bistro (Colorado Springs, CO)
• Castagna Restaurant (Portland, OR)
• Charleston (Baltimore, MD)
• Chez Nous French Restaurant (Humble, TX)
• Chez Francois - Vermilion (Vermilion, OH)
• Chimney Park (Windsor, CO)
• Circle Brunch - The Breakers (Palm Beach, FL)
• Clementines (Avon-By-The-Sea, NJ)
• Collage Restaurant (St Augustine, FL)
• Daniel (New York, NY)
• Del Posto (New York, NY)
• Eleven Madison Park (New York, NY)
• Farmhouse Inn & Restaurant (Forestville, CA)
• Fearrington House Restaurant (Pittsboro, NC)
• Forage (Salt Lake City, UT)
• Geronimo (Santa Fe, NM)
• Gramercy Tavern (New York, NY)
• Halls Chophouse (Charleston, SC)
• Hannas Prime Steak (Rancho Santa Margarita, CA)
• Jillian’s (Palm Desert, CA)
• Joan’s in the Park (Saint Paul, MN)
• Joseph Tambellini (Pittsburgh, PA)
• Kai - Sheraton Wild Horse Pass Resort (Chandler, AZ)
• King Umberto Restaurant (Elmont, NY)
• KUSAKABE (San Francisco, CA)
• L’Auberge Chez Francois (Great Falls, VA)
• La Folie (San Francisco, CA)
• La Mer at Halekulani (Honolulu, HI)
• La Grenouille (New York, NY)
• Laurel (Philadelphia, PA)
• Le Cep (Fort Worth, TX)
• Le Bernardin (New York, NY)
• Les Nomades (Chicago, IL)
• Mama’s Fish House (Paia, HI)
• Marché Moderne (Costa Mesa, CA)
• McNinch House (Charlotte, NC)
• Michael’s - South Point Casino (Las Vegas, NV)
• Mistral - Sherman Oaks (Sherman Oaks, CA)
• Montalcino Ristorante Italiano (Issaquah, WA)
• n/naka (Los Angeles, CA)
• Nicholas (Red Bank, NJ)
• Norman’s at the Ritz-Carlton Orlando (Orlando, FL)
• o ya (Boston, MA)
• Orchids at Palm Court (Cincinnati, OH)
• Per Se (New York, NY)
94.3 Other Categories

Diners’ Choice Awards are also designated in the following categories:

- Brunch (www.opentable.com/m/best-brunch-restaurants-in-america)
- Fit for Foodies Restaurants (www.opentable.com/m/best-restaurants-for-foodies-in-america)
- Hot Spots (www.opentable.com/m/hottest-restaurants-in-america)
- Most Notable Wine Lists (www.opentable.com/m/best-wine-list-restaurants-in-america)
- Most Romantic Restaurants (www.opentable.com/m/most-romantic-restaurants-in-america)
- Most Scenic Views (www.opentable.com/m/best-scenic-view-restaurants-in-america)
- Neighborhood Gems (www.opentable.com/m/best-neighborhood-gem-restaurants-in-america)
- Outdoor Dining (www.opentable.com/m/best-outdoor-dining-restaurants-in-america)
• Top Barbeque Restaurants
  (www.opentable.com/m/best-BBQ-restaurants-in-america)
• Top Steakhouses (www.opentable.com/m/best-steakhouses-in-america)
• Top Vegetarian & Vegan Friendly Restaurants
  (www.opentable.com/m/best-restaurants-for-vegetarians-and-vegans-in-america)

94.4 Market Resources
Open Table, 1 Montgomery Street, Suite 700, San Francisco CA 94104.
(www.opentable.com)
DISTINGUISHED RESTAURANTS

95.1 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.

95.2 List Of Distinguished Restaurants

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)
• Méliisse 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 Restorante e Bar (Waltham)
• Óran 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 Bottom)
• 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)
• Caffe’ 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)
• III 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)

**95.3 Market Resources**
DiRona, 105 West Michigan Avenue, Marshall, MI 49068. (269) 789-9316. (www.dirona.com)
96.1 List of Inductees

*Nation’s Restaurant News* founded the Fine-Dining Hall of Fame for 1999. The following restaurants have been inducted:

- Abacaus (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)
• Ema’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)
• Hot and Hot Fish Club (Birmingham, AL)
• Hotel Bel-Air Restaurant (Los Angeles, CA)
• Incanto (San Francisco, CA)
• Jack’s Oyster House (Albany, NY)
• James at the Mill (Johnson, AR)
• Janos Restaurant (Tucson, AZ)
• Jar (Los Angeles, CA)
• Jasper’s Ristorante (Kansas City, MO)
• 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)
• Momofuku Ko (New York, NY)
• 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)
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FIVE-DIAMOND AWARDS

97.1 Overview

AAA (www.aaa.com) began 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.

97.2 Five-Diamond Award Winners

AAA designated the following restaurants with Five Diamond ratings for 2015:

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)
• Saison (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
• Palm d’Or (in The Biltmore Coral Gables, Miami)
• 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)
• Wheatleigh’s Dining Room (in the Wheatleigh, Lenox)

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)
• Twist (in the Mandarin Oriental, Las Vegas)

New York
• Blue Hill at Stone Barns (Tarrrytown)
• 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 Fearrington House Restaurant (in The Fearrington House Inn, Fearrington Village)

Ohio
• Orchids at Palm Court (in the Hilton Cincinnati, Netherlands Plaza, Cincinnati)

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)
98.1 Award Winners

Forbes Travel Guide (www.forbestravelguide.com), formerly Mobil Travel Guide, publishes a Five- and Four-Star rating system to provide a reliable source for selecting restaurants, hotels, motels, inns, and resorts in more than 3,000 towns and cities in the United States and Canada.

The following restaurants received Five-Star rating in 2015:

Arizona
• Kai (Chandler)

California
• Aubergine, the Restaurant at L’Auberge Carmel (Carmel)
• Manresa (Los Gatos)
• Mélisse (Santa Monica)
• Studio (Laguna Beach)
• The French Laundry (Yountville)
• The Restaurant at Meadowood (St. Helena)

Colorado
• Penrose Room (Colorado Springs)

District of Columbia
• Plume (Washington)

Florida
• Azul (Miami)
• Naoe (Sunny Isles Beach)

Georgia
• Georgian Room (Sea Island)

Hawaii
• La Mer (Honolulu)
Illinois
• Alinea (Chicago)
• Grace (Chicago)
• Sixteen (Chicago)

Maine
• The White Barn Inn Restaurant (Kennebunkport)

Massachusetts
• Menton (Boston)
• The Dining Room at Wheatleigh (Lenox)

Nevada
• Joël Robuchon at the Mansion (Las Vegas)
• Restaurant Guy Savoy (Las Vegas)
• Twist by Pierre Gagnaire (Las Vegas)

New York
• Daniel (New York)
• Del Posto (New York)
• Eleven Madison Park (New York)
• Jean Georges (New York)
• Le Bernardin (New York)
• Masa (New York)
• per se (New York)

North Carolina
• Herons (Cary)
• The Fearrington House Restaurant (Pittsboro)

Pennsylvania
• Lautrec (Framington)
• TÈ Restaurant (Leola)

Rhode Island
• Seasons (Watch Hill)

South Carolina
• Charleston Grill (Charleston)
• Circa 1886 (Charleston)
• Peninsula Grill (Charleston)
• The Ocean Room (Kiawah Island)
Texas
• The Inn at Dos Brisas (Brenham)

Virginia
• The Inn at Little Washington Dining Room (Washington)
FOOD & WINE’S BEST NEW CHEFS

99.1 Overview

*Food & Wine* recognizes 10 Best New Chefs annually. To qualify, chefs must have run a kitchen for no longer than five years.

99.2 Award Winners 2015

Announced in the July 2015 issue of *Food & Wine*, the following were recognized as the Best New Chefs of 2015:
- Zoi Antonitsas (Westward; Seattle, WA)
- Jake Bickelhaupt (42 grams; Chicago, IL)
- Jonathan Brooks (Milktooth, Indianapolis, IN)
- Katie Button (Cúrate, Nightbell; Asheville, NC)
- Jim Christiansen (Heyday; Minneapolis, MN)
- Michael Fojtasek & Grae Nonas (Olamaie; Austin, TX)
- Tim Maslow (Strip-T’s; Watertown, MA and Ribelle; Brookline, MA)
- Ori Menashe (Bestia; Los Angeles, CA)
- Carlos Salgado (Taco María; Costa Mesa, CA)
- Bryce Shuman (Betony, New York, NY)

99.3 Recent Award Winners

*Food & Wine* recognized the following as the Best New Chefs in recent years:

2014
- Matthew Accarrino (SPQR; San Francisco, CA)
- Dave Beran (Next; Chicago, IL)
- Greg Denton & Gabrielle Quiñónez Denton (Ox; Portland, OR)
- Eli Kulp (Fork; Philadelphia, PA)
- Matt McCallister (FT33; Dallas, TX)
- Joe Ogrodnek & Walker Stern (Dover; Brooklyn, NY)
- Paul Qui (Qui; Austin, TX)
- Cara Stadler (Tao Yuan; Brunswick, ME)
- Ari Taymor (Alma; Los Angeles, CA)
- Justin Yu (Oxheart; Houston, TX)
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)

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)
**100 GREAT PIZZA RESTAURANTS**

**100.1 Overview**

The following section lists several awards and designations that recognize pizza restaurants throughout the U.S.

**100.2 List Of Recognitions 2015**

**Best Pizza Restaurants** (Gayot, www.gayot.com)
- 2Amys Neapolitan Pizzeria (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)

**Epicurious** (www.epicurious.com)
- Antico Pizza Napoletana (Atlanta, GA)
- Harry’s Pizzeria (Miami, FL)
- Milo & Olive (Los Angeles, CA)
- Nonna (Dallas, TX)
- Osteria (Philadelphia, PA)
- Picco (Boston. MA)
- Pig Ate My Pizza (Robbinsdale, MN)
- Reno (Chicago, IL)
- The Independent Pizzeria (Seattle, WA)
- Totonno’s Pizzeria Napoletana

**Food & Wine**
- 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)
Platinum Fork Awards (LocalEats, www.localeats.com)
- 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)

The 33 Best Pizza Shops In America 2015 (www.thrillist.com)
- Arca Four (Boston, MA)
- Al Forno (Providence, RI)
- Antico Pizza Napoletana (Atlanta, GA)
- Bread and Salt (Pittsburgh, PA)
- Cane Rosso (Dallas, TX)
- Coalfire (Chicago, IL)
- Coals Artisan Pizza (Louisville, KY)
- Di Fara (Brooklyn, NY)
- Double Mountain (Hood River, OR)
- Flour + Water (San Francisco, CA)
- Frank & Helen’s (St. Louis, MO)
- Frank Pepe Pizzeria Napoletana (New Haven, CT)
- Galleria Umberto (Boston, MA)
- Loui’s (Hazel Park, MI)
- Motorino (New York, NY)
- Papa’s Tomato Pies (Robbinsville, NJ)
- Pequods (Chicago, IL)
- Pizza Domenica (New Orleans, LA)
- Pizzaiola (Oakland, CA)
- Pizzeria Beddia (Philadelphia, PA)
- Pizzeria Mozza (Los Angeles, CA)
- Post Office Pies (Birmingham, AL)
- Punch Pizza (Saint Paul, MN)
- Roberta’s (Brooklyn, NY)
- Sally’s Apizza (New Haven, CT)
- Serious Pie (Seattle, WA)
- Slab (Portland, ME)
- Supino Pizzeria (Detroit, MI)
- Tony’s Pizzeria Napoletana (San Francisco, CA)
- Via 313 (Austin, TX)
• Vipizza (Queens, NY)
• Vito and Nick’s (Chicago, IL)

**Trip Advisor** ([www.tripadvisor.com](http://www.tripadvisor.com))
• Antico Pizza Napoletana (Atlanta, GA)
• Bill’s Pizza (Palm Springs, CA)
• Frank Pepe Pizzeria Napoletana (New Haven, CT)
• John’s of Bleecker Street (New York, NY)
• Juliana’s Pizza (Brooklyn, NY)
• Keste (New York, NY)
• Mooose Tooth Pub and Pizzeria (Anchorage, AK)
• Pizza Time Of St. Augustine (St. Augustine, FL)
• Regina Pizzeria (Boston, MA)
• Tony’s Pizza Napoletana (San Francisco, CA)

**Zagat 2015** ([www.zagat.com](http://www.zagat.com))
• Dough Pizzeria Napoletana (Dallas, TX)
• Frankie’s Pizza (Miami, FL)
• Galleria Umberto (Boston, MA)
• Home Slice Pizza (Austin, TX)
• Lovely’s Fifty Fifty (Portland, OR)
• Lucali (New York, NY)
• Michael’s Pizzeria (Long Beach, CA)
• Santucci’s (Philadelphia, PA)
• Santucci’s Original Square Pizza (Philadelphia, PA)
• Spacca Napoli Pizzeria (Chicago, IL)
• Tony’s Pizza Napoletana (San Francisco, CA)
• Veraci Pizza (Seattle, WA)
101.1 Overview

The following section lists several awards and designations that recognize seafood restaurants throughout the U.S.

101.2 List Of Recognitions 2015

10 Best Seafood Restaurants - Reader’s Choice *(USA Today)*
- Bowens Island Restaurant (Charleston, SC)
- Cantler’s (Annapolis, MD)
- Elliot’s Oyster House (Seattle, WA)
- Joe’s Stone Crab (Miami, FL)
- Legal Sea Foods (Boston, MA)
- Mabel’s Lobster Claw (Kennebunkport, ME)
- Mama’s Fish House (Maui, HI)
- Red Fish Grill (New Orleans, LA)
- Uncle’s Fish Market & Grill (Honolulu, HI)
- Union Oyster House (Boston, MA)

- Esca (New York, NY)
- Fish (Charleston, SC)
- GT Fish & Oyster (Chicago, IL)
- o ya (Boston, MA)
- Pêche Seafood Grill (New Orleans, LA)
- Perla’s Seafood & Oyster Bar (Austin, TX)
- RingSide Fish House (Portland, OR)
- Stoic & Genuine (Denver, CO)
- The Sardine Factory (Monterey, CA)
- The Hoke Kitchen & Bar (La Jolla, CA)

2015 America’s Best Seafood Dives *(Coastal Living)*
- Alive and Kicking Lobsters (Cambridge, MA)
- Bob’s Clam Hut (Kittery, ME)
- Cap’n Jack’s Restaurant (South Kingston, RI)
• Captain Lou’s (South Haven, MI)
• Channel Marker Restaurant (Atlantic Beach, NC)
• Deanie’s Seafood of Bucktown (Metairie, LA)
• Dirty Al’s Seafood Restaurant (South Padre Island, TX)
• Ecola Seafoods Restaurant & Market (Cannon Beach, OR)
• Half Shell Raw Bar (Key West, FL)
• LeJeune’s Market by the Bay (Fairhope, AL)
• Macky’s Bayside Bar & Grill (Ocean City, MD)
• Navy Beach Restaurant (Montauk, NY)
• OleBob’s Galley Café (Ilwaco, WA)
• Petey’s Summertime Seafood and Bar (Rye, NH)
• Rosetti’s Café (Biloxi, MS)
• Shoreline Beach Café (Santa Barbara, CA)
• The Albright (Santa Monica, CA)
• The Breakfast Club (Tybee Island, GA)
• The Red Bar (Santa Rosa Beach, FL)
• Westfair Fish & Chips (Westport, CT)
• Yorktown Pub (Yorktown, VA)

America’s Best Seafood Shacks (The Daily Meal, www.thedailymeal.com)
• Abbott’s Lobster in the Rough (Noank, CT)
• Alabama Jack’s (Key Largo, FL)
• Arnold’s Lobster & Clam Bar (Cape Cod, MA)
• Big John’s Seafood Patio (Erath, LA)
• Bowen Island Restaurant (Charleston, SC)
• Brown’s Lobster Pond (Seabrook, NH)
• Calumet Fishes (Chicago, IL)
• City Seafood (Everglades City, FL)
• Da Poke Shack (Kona, HI)
• Doc’s Seafood (Orange Beach, AL)
• Doug’s Fish Fry (Skaneatles, NY)
• Five Islands Lobster Company (Five Islands, ME)
• Hangar on the Wharf (Juneau, AK)
• Hudson’s on the Docks (Hilton Head, SC)
• Iggy’s Doughboy and Chowder House (Warwick, RI)
• Jolly Roger Seafood House (Port Clinton, OH)
• J.T. Farnham’s (Essex, MA)
• Malibu Seafood (Malibu, CA)
• Red’s Eats (Wisaccet, ME)
• Snoopy’s Pier (Corpus Christi, TX)
• Splash Cafe (Pismo Beach, CA)
• The Bite (Martha’s Vineyard, MA)
• The Clam Bar at Napeague (Hampton, NY)
• The Clam Box (Ipswich, MA)
• The Clam Shack (Kennebunkport, ME)
• The Crab Shack (Savannah, GA)
• The Lobster Shack at Two (Cape Elizabeth, ME)
• The Original Mo’s (Newport, RI)
• The Wreck of Richard and Charlene (Mount Pleasant, SC)
• Tide’s Tavern (Gig Harbor, WA)
• Woodman’s of Essex (Essex, MA)
• Woody’s Crab House (North East, MD)
• Yacht Provision Company (Southport, NC)

**Best Seafood Restaurants (Travel + Leisure)**

- 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)
Platinum Fork Awards (LocalEats, www.localeats.com)
- 15th Street Fisheries & Dockside Cafe (Ft. Lauderdale, FL)
- Frenchy’s Original Cafe (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 Cafe (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)

Tom Horan’s Top Ten Seafood Houses (www.tomhoran.com)
- Bourbon House (New Orleans, LA)
- Capt. Anderson’s Restaurant (Panama City Beach, FL)
- Eddie V’s Prime Seafood (Scottsdale, AZ)
- Elliott’s Oyster House (Seattle, WA)
- Lynnhaven Fish House (Virginia Beach, VA)
- Osetra (San Diego, CA)
- RingSide Fish House (Portland, OR)
- The Sea Fire Grill (New York, NY)
- Tony Mandola’s (Houston, TX)
- Z’s Oyster Bar & Steakhouse (Louisville, KY)
102.1 Overview
The following section lists several awards and designations that recognize
steakhouses throughout the U.S.

102.2 List Of Recognitions 2015
Best American Steakhouses (www.bestamericansteakhouses.com)
• Bob’s Steak and Chop House (several locations)
• Carne Chophouse (Tampa, FL)
• Chicago Chop House (Chicago, IL)
• Dressler’s Restaurant (Charlotte, NC)
• Eddie Merlot’s (several locations)
• Hyde Park Prime Steakhouse (several locations)
• Jimmy Kelly’s Steakhouse (Nashville, TN)
• Meat Market (several locations)
• Pampas Brazilian Grille (Las Vegas, NV; Palo Alto, CA)
• Stockyards Steakhouse (Phoenix, AZ)
• The Prime Rib (several locations)
• Tropical Acres (Ft. Lauderdale, FL)
• Uncle Jack’s (several locations)

Gayot (www.gayot.com)
• American Cut (Las Vegas, NV)
• Bazaar Meat by José Andrés (Las Vegas, NV)
• Butcher & Singer (Philadelphia, PA)
• Chianina Steakhouse (Long Beach, CA)
• Chophouse New Orleans (New Orleans, LA)
• Del Campo (Washington, DC)
• Knife (Dallas, TX)
• McKendricks Steak House (Atlanta, GA)
• Miller’s Guild (Seattle, WA)
• St. Elmo Steak House (Indianapolis, IN)
Great Steak Houses of North America ([http://greatsteakofna.com](http://greatsteakofna.com))
- Benjamin Steak House (New York and White Plains, NY)
- Elway’s (Denver, CO)
- 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)

Platinum Fork Awards ([LocalEats, www.localeats.com](http://www.localeats.com))
- 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 ([www.thedailymeal.com](http://www.thedailymeal.com))
- 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** ([www.thrillist.com](http://www.thrillist.com))
- 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** ([www.tomhoran.com](http://www.tomhoran.com))
- Benjamin Steak House (New York, NY)
- Bern’s Steak House (Tampa, FL)
- Chicago Cut Steakhouse (Chicago, IL)
- Dickie Brennan’s Steakhouse (New Orleans, LA)
- E.B. Green’s Steakhouse (Buffalo, NY)
- Island Prime (San Diego, CA)
- Steamboat House (Houston, TX)
- Stock-Yard Restaurant (Nashville, TN)
- The Prime Rib (Baltimore, MD)
- Vic & Anthony’s (Houston, TX)
- Z’s Oyster Bar & Steakhouse (Louisville, KY)
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JAMES BEARD FOUNDATION AWARDS

103.1 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.

103.2 Award Winners 2015

Outstanding Restaurant
• Blue Hill at Stone Barns (Pocantico Hills, NY)

Best New Restaurant
• Bâtard (New York, NY)

Outstanding Chef
• Michael Anthony: Gramercy Tavern (New York, NY)

Rising Star Chef
• Jessica Largey: Mamresa (Los Gatos, CA)

Outstanding Baker
• Jim Lahey: Sullivan Street Baker (New York, NY)

Outstanding Pastry Chef
• Christina Tosi: Momofuku (New York, NY)

Best Chef: Great Lakes
• Jonathon Sawyer: The Greenhouse Tavern (Cleveland, OH)

Best Chef: Mid-Atlantic
• Spike Gjerde: Woodberry Kitchen (Baltimore, MD)

Best Chef: Midwest
• Gerard Craft: Nice (Clayton, MO)
Best Chef: New York City
• Mark Ladner: Del Posto (New York, NY)

Best Chef: Northeast
• Barry Maiden: Hungry Mother (Cambridge, MA)

Best Chef: Northwest
• Blaine Wetzel: The Willows Inn on Lummi Island (Lummi Island, WA)

Best Chef: South
• Alon Shaya: Domenica (New Orleans, LA)

Best Chef: Southeast
• Jason Stanhope: FIG (Charleston, SC)

Best Chef: Southwest
• Aaron Franklin: Franklin Barbecue (Austin, TX)

Best Chef: West
• Stuart Brioza and Nicole Krasinski: State Bird Provisions (San Francisco, CA)

103.3 Recent Award Winners
Outstanding Restaurant
• 2014: The Slanted Door (San Francisco, CA)
• 2013: Blue Hill (New York, NY)
• 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
• 2014: Pêche Seafood Grill (New Orleans, LA)
• 2013: State Bird Provisions (San Francisco, CA)
• 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
• 2014: Nancy Silverton (Pizzeria Mozzo; Los Angeles, CA)
• 2013: David Chang (Momofuku Noodle Bar; New York, NY) and Paul Kahan (Blackbird; Chicago, IL)
• 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
• 2014: Jimmy Bannos Jr. (The Purple Pig; Chicago, IL) and Blaine Wetzel (The Willows Inn on Lummi Island; Lummi Island, WA)
• 2013: Danny Bowien (Mission Chinese Food; San Francisco and New York, NY)
• 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
• 2014: Dominique Ansel (Dominique Ansel Bakery; New York, NY)
• 2013: Brooks Headley (Del Posto; New York, NY)
• 2012: Mindy Segal (Mindy’s HotChocolate; Chicago, IL)
• 2011: Angela Pinkerton (Eleven Madison Park; New York, NY)
• 2010: Nicole Plue (Redd; Yountville, CA)

103.4 Market Resources
James Beard Foundation, 167 West 12th Street, New York, NY 10011. (212) 675-4984. (www.jamesbeard.org)
MENU MASTERS AWARDS

104.1 Overview
Selected annually by Nation’s Restaurant News, the Menu Masters Awards (www.menumasters.com) honor companies and individuals that have created the most successful new menu developments. This chapter lists current and recent award winners.

104.2 Winners By Category
Best Healthy Innovations
- 2015: Which Wich - Vegan Chicken Banh Mi, Buffalo Chicken
- 2014: First Watch - Quinoa Power Bowls
- 2013: Silver Diner - Kids Menu
- 2012: The Cheesecake Factory - “SkinnyLicious” Menu
- 2011: Subway - Build Your Better Breakfast
- 2010: KFC - Kentucky Grilled Chicken

Best Limited-Time Offer
- 2015: Popeyes Louisiana Kitchen - Buttermilk Biscuit Butterfly Shrimp
- 2014: Wendy’s - Pretzel Bacon Burger
- 2013: Papa John’s Pizza - Buffalo Chicken Pizza
- 2012: Quaker Steak & Lube - Shake, Wrap & Roll!
- 2011: Popeyes Louisiana Kitchen - Wicked Chicken
- 2010: Red Robin Gourmet Burgers - Southwest Ancho Chicken Salad

Best Menu/Line Extension
- 2015: Smashburger - Organic Arugula, Truffle Mushroom & Swiss Burger
- 2014: McDonald’s - Premium McWraps
- 2013: Noodles & Company - Slow Braised, Naturally Raised Pork
- 2012: Wendy’s - The W Cheeseburger
- 2011: Shari’s Restaurant & Pies - Blackberry Season
- 2010: Au Bon Pain - Chicken Artichoke Sandwich

Best Menu Revamp
- 2015: Bonefish Grill
- 2014: Joe’s Crab Shack
• 2013: Red Lobster
• 2012: Buffalo Wild Wings
• 2011: Old Chicago Pizza & Pasta
• 2010: Tropical Smoothie Cafe

Best Menu Trendsetter
• 2015: Mendocino Farms
• 2014: True Food Kitchen
• 2013: Cooper’s Hawk Winery & Restaurants
• 2012: Mama Fu’s
• 2011: UMass Dining
• 2010: Burgerville

Best New Menu Item
• 2015: Chick-fil-A - Grilled Chicken Sandwich
• 2014: Chili’s Bar & Grill - Pizza Flatbreads
• 2013: Taco Bell - Doritos Locos Tacos
• 2012: Sonic Corp. - Premium Beef Hot Dogs
• 2011: Panda Express - Honey Walnut Shrimp
• 2010: Outback Steakhouse - Sweet Glazed Roasted Pork Tenderloin

Chef/Innovator
• 2015: Jimmy Bannos, Jr. (The Purple Pig)
• 2014: Michael Smith (Michael Smith Restaurant)
• 2013: Jonathon Sawyer (Greenhouse Tavern)
• 2012: Stan Frankenthaler (Dunkin’ Brands)
• 2011: Scott Davis (Panera Bread)
• 2010: Brad Blum (Romano’s Macaroni Grill)
• 2009: David Burke (David Burke Kitchen)
• 2008: Paul Carr (Aramark)
• 2007: Cliff Pleau (Darden Restaurants)
• 2006: Dan Coudreaut (McDonald’s)
• 2005: Kurt Hankins (Applebee’s)
• 2004: Oona Settembre (PepsiCo)
• 2003: Robert Okura (The Cheesecake Factory)
• 2002: Stephen Anderson (The Cheesecake Factory)
• 2001: Johnny Law (McDonald’s)

Menu Masters Hall of Fame
• 2015: John Besh (Besh Restaurant Group)
• 2014: Mary Sue Milliken & Susan Feniger (Border Grill)
• 2013: Chef José Andrés (Think Food Group)
• 2012: Jose Garces (Amada, Tinto, Village Whiskey)
• 2011: Tom Colicchio (Colicchio & Sons, ‘wichcraft)
• 2010: Jon Luther (Dunkin’ Brands)
• 2009: Wolfgang Puck (Spago, Postrio)
• 2008: Roger Berkowitz (Legal Sea Foods)
• 2007: Burt Cutino (The Sardine Factory)
• 2006: Emeril Lagasse (Emeril’s)
• 2005: David Overton (The Cheesecake Factory)
• 2004: Martin Yan (Yan Can Restaurants)
• 2003: Paul Prudhomme (K-Paul’s Louisiana Kitchen)
• 2002: Jasper White (Jasper’s, Summer Shack)
• 2001: Richard Melman (Lettuce Entertain You Enterprises)
• 2000: Jacques Pepin (French Culinary Institute)
• 1999: Colonel Sanders (Kentucky Fried Chicken)
• 1998: Warren LeRuth (LeRuth’s)

104.3 Market Resources
Nation’s Restaurant News, 249 W. 17th Street, New York, NY 10011. (212) 204-4200. (www.nrn.com)
105.1 Overview
Michelin published its first guide in 1900 in France. In 2005, The Michelin Guide (www.michelinguide.com) 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 the San Francisco/Napa region for 2015.

105.2 Chicago 3-Star Restaurant
- Alinea

105.3 New York 3-Star Restaurants
- Chef's Table at Brooklyn Fare (Brooklyn)
- Eleven Madison Park
- Jean Georges
- Le Bernardin
- Masa
- Per Se

105.4 San Francisco and Napa Region 3-Star Restaurants
- The French Laundry (Yountville)
- The Restaurant at Meadowood (St. Helena)
106.1 Award Winners 2015

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 2015 for their community-focused contributions:

**Alabama**
- Shoreline Grill (Salem)
- Taco Bell/Tacala Companies (Vestavia Hills)

**Arizona**
- The Dhaba (Tempe)

**California**
- Black Bear Diners, Inc. (Redding)
- Bravo’s Soup & Sandwich Shoppe (Elk Grove)
- Buffalo Wild Wings/Franchisee Karim Webb (Los Angeles)
- El Pollo Loco (Costa Mesa)
- Milano Restaurants International Corp. (Freson)
- Mulvaney’s B&L (Sacramento)
- Universal Studios Hollywood (Universal City)

**Colorado**
- Epicurean Group Inc. (Centennial)
- The Kitchen (Boulder)

**Delaware**
- High 5 Hospitality d.b.a. Buffalo Wild Wings (Bear)

**District of Columbia**
- Argonaut Tavern (Washington)
- EatWell DC (Washington, DC)
- Passion Food Hospitality (Gus DiMillo, partner)
Florida
• Gecko’s Grill & Pub: Michael Quillen (Sarasota)
• Jessi’s Family Restaurant Inc. (Pinellas Park)
• Pizza Gallery & Grill (Viera)
• Tijuana Flats (Alamonte Springs)

Georgia
• Here To Serve Restaurants (Atlanta)
• Norsan Group Restaurants (Duluth)
• Ray’s on the River (Atlanta)
• Sterling Spoon Culinary Management and Marlow’s Tavern (Atlanta)
• Tin Lizzy’s Cantina (Atlanta)
• Zaxby’s (Athens)

Hawaii
• Da Kitchen Cafe (Kahului)

Idaho
• Trinity at City Beach (Sandpoint)

Illinois
• Pita House Restaurant (Schaumburg)

Iowa
• Full Court Press, Inc (Des Moines)
• Mickey’s Irish Pub (Waukee)

Louisiana
• Nonna (Monroe)
• Phil’s Grill (Harahan)
• The Crazy Lobster (New Orleans)

Maine
• Dysart’s (Hermon)

Maryland
• Ben Yehuda Café & Pizzeria (Silver Spring)
• Black Restaurant Group (Bethesda)
• Galazy Bay/Irish Restaurant Company (Annapolis)

Montana
• Glacier Restaurant Group (Whitefish)
Nebraska
• Cappy’s Hotspot Bar & Grill/Nightclub (Lincoln)
• Dish (Lincoln)
• Lazlo’s Brewery & Grill (Lincoln)
• Liberty Tavern (Omaha)
• Runza Restaurants (Lincoln)

Nevada
• Origin Indian Restaurant & Bar (Las Vegas)

New Hampshire
• The Common Man (Ashland)

New Jersey
• Doherty Enterprises, Inc. (Allendale)

North Carolina
• Apple Gold Group (Raleigh)
• Jan-Marie Merrill (Durham)
• LM Restaurants (Raleigh)

Ohio
• Ciao Ristorante (Sylvania)
• Real Seafood Company (Toledo)

Oklahoma
• Old Germany Restaurant (Choctaw)

Oregon
• Bandon Dunes Golf Resort (Bandon)
• Beau Delicious International dba Café Yumm! (Eugene)
• Cattleman’s Saloon (Rogue River)
• Po’Shines (Portland)

Pennsylvania
• Auntie Anne’s, Inc (Lancaster)
• Arooga’s Grille House & Sports Bar (Harrisburg)
• Irish Pub (Philadelphia)
• Punxsy Pizzza (Punxutawney)
• The Rose Group (Newtown)
• The Supper Club at the Greensburg Train Station (Greenburg)
Rhode Island
• Brick Alley Pub & Restaurant (Newport)
• Gregg’s Restaurant & Pubs (East Greenwich)

South Carolina
• Table 301 Restaurant Group, Carl Soboncinski (Greenville)

Tennessee
• Huey’s Restaurant (Memphis)
• JNS Holdings LLC (Nashville)

Texas
• Cured, Steve McHugh of Cured (San Antonio)
• Fish City Grill (Addison)
• Papouli’s Greek Grill (San Antonio)
• Snappy Salad’s (Dallas)
• ThunderCloud Subs (Austin)
• West End Pizza Company (Fredericksburg)

Utah
• Utah Del (Salt Lake City)

Virginia
• Village Square Restaurant (Winchester)

Washington
• Azteca Mexican Grill, Randy Thurman, executive director (Seattle)
• Dutch Bros. Coffee, Kevin Parker, owner (Spokane)
• El Gaucho (Seattle)
• Frasers Gourmet Hideaway (Oak Harbor)
• Starbucks (Seattle)
TRAVELERS’ CHOICE AWARDS

107.1 Overview
TripAdvisor (www.tripadvisor.com) branded sites make up the largest travel community in the world, reaching 350 million unique monthly visitors and more than 290 million reviews and opinions covering more than 5.3 million accommodations, restaurants and attractions.

Annually, TripAdvisor designates Travelers’ Choice Awards in several categories based on traveler feedback. This chapter lists the award winners in the Restaurants category.

107.2 Awards 2015
• Bouley (New York, NY)
• Alina (Chicago, IL)
• Le Bernardin (New York, NY)
• Uchi (Austin, TX)
• Halls Chophouse (Charleston, SC)
• Victoria & Albert’s (Orlando, FL)
• Canlis Restaurant (Seattle, WA)
• Chez Panisse (Berkeley, CA)
• Daniel (New York, NY)
• Papas Bros. Steakhouse (Houston, TX)
• Restaurant Gary Danko (San Francisco, CA)
• Eleven Madison Park (New York, NY)
• Circa 1886 Restaurant (Charleston, SC)
• Mama’s Fish House (Paia, HI)
• Lahaina Grill (Lahaina, HI)
• The French Laundry (Yountville, CA)
• Colicchio & Sons (New York, NY)
• Per Se (New York, NY)
• Girl & The Goat (Chicago, IL)
• Bavette’s Bar and Boeuf (Chicago, IL)
• Butcher & The Boar (Minneapolis, MN)
• Kokkari Estiatorio (San Francisco, CA)
• The River Cafe (Brooklyn, NY)
• L’Atelier de Joël Robuchon (Las Vegas, NV)
• Rasika (Washington, DC)

107.3 Market Resources
TripAdvisor, 400 1st Avenue, Needham, MA 02494. (781) 800-5000.
(www.tripadvisor.com)
108.1 Overview
Since 1949, the American Academy of Hospitality Sciences (AAHS) has recognized restaurants with its Star Diamond Award (www.stardiamondaward.com).

108.2 Five Star Diamond Awards 2015
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)
- Empire Steak House (New York, NY)
- Garwood Lounge & Piano Bar (Fisher Island, FL)
- Giginotra (New York, NY)
- Giumarello’s (Westmont, NJ)
- Hendrick’s Tavern (Roslyn, NY)
- ilili Restaurant (New York, NY)
- J&G Steakhouse (Washington, DC)
- Jean Georges (New York, NY)
- Jungsik (New York, NY)
- Le Bernardin (New York, NY)
- Le Cirque (New York, NY)
- La Dorada (Coral Gables, FL)
- LeMont Restaurant (Pittsburgh, PA)
- Mark’s American Cuisine (Houston, TX)
- Maya Restaurant (New York, NY)
- MEGU Midtown (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)
• Pearl East (Manhasset, NY)
• Per Se Restaurant (New York, NY)
• Pistache French Bistro (West Palm Beach, FL)
• Quattro Gastronomia Italiana (Miami Beach, FL)
• Seasonal Restaurant & Weinbar (New York, NY)
• Smoke Rise Village Inn (Kinnelon, NJ)
• Southern Hospitality (Denver, CO)
• Southern Hospitality (New York, NY)
• 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 Hunt & Fish Club (New York, NY)
• The Mercer Kitchen (New York, NY)
• Toku (Manhasset, NY)
• Vetro Restaurant & Lounge (Howard Beach, NY)
• Zuma (New York, NY)

108.3 Market Resources
The American Academy of Hospitality Sciences, 240 Central Park South, New York, NY 10019. (212) 582-5812. (www.stardiamondaward.com)
TOP 40 RESTAURANTS

109.1 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. This chapter presents the 2015 selections.

109.2 Selections 2015
• Alinea (Chicago, IL)
• Aubergine (Carmel, CA)
• Bouley (New York, NY)
• Chef Mavro (Honolulu, HI)
• Coi (San Francisco, CA)
• Daniel (New York, NY)
• Eleven Madison Park (New York, NY)
• Everest (Chicago, IL)
• Frasca Food and Wine (Denver, CO)
• Grace (Chicago, IL)
• Jean-Georges (New York, NY)
• Joël Robuchon (Las Vegas, NV)
• L’Espalier (Boston, MA)
• La Belle Vie (Minneapolis, MN)
• Le Bernardin (New York, NY)
• Le Cirque (New York, NY)
• Mélisse (Los Angeles, CA)
• Michael Mina (San Francisco, CA)
• Naoe (Miami, FL)
• Patina (Los Angeles, 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)
• Saison (San Francisco, CA)
• Studio (Long Beach, CA)
• Sushi Nakazawa (New York, NY)
• The Barn at Blackberry Farm (Walland, TN)
• The French Laundry (Yountville, CA)
• The Inn at Little Washington (Washington, VA)
• The Mansion Restaurant at Rosewood Mansion on Turtle Creek (Dallas, TX)
• The Restaurant at Meadowood (St. Helena, CA)
• The Willows Inn (Lummi Island, WA)
• Tru (Chicago, IL)
• Twist by Pierre Gagnaire (Las Vegas, NV)
• Urasawav (Los Angeles, CA)
• Vetri (Philadelphia, PA)
• Vie (Western Springs, IL)

109.3 Market Resources
Gayot, 4311 Wilshire Boulevard, Suite 405, Los Angeles, CA 90010. (323) 965-3529. (www.guyot.com)
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TOP 101 RESTAURANTS

110.1 Overview

The Daily Meal (www.thedailymeal.com), an online resource by Spanfeller Media Group, publishes an annual list of the top 101 restaurants in the United States. Restaurants 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.

110.2 Top Selections 2015

1. Daniel (New York, NY)
2. Le Bernardin (New York, NY)
3. Joël Robuchon (Las Vegas, NV)
4. Alinea (Chicago, IL)
5. Jean-Georges (New York, NY)
6. Del Posto (New York, NY)
7. French Laundry (Yountville, CA)
8. Eleven Madison Park (New York, NY)
9. Per Se (New York, NY)
10. Spago (Los Angeles, CA)
11. Next (Chicago, IL)
12. Commander’s Palace (New Orleans, LA)
13. Blue Hill Stone Barns (Pocantico Hills, NY)
14. Girl & the Goat (Chicago, IL)
15. Bouchon Bistro (Yountville, CA)
16. Momofuku Ko (New York, NY)
17. Husk (Charleston, SC)
18. Guy Savoy (Los Angeles, CA)
19. The Restaurant at Meadowood (St. Helena, CA)
20. Blue Hill (New York, NY)
21. Blackbird (Chicago, IL)
22. Galatoire’s (New Orleans, LA)
23. Masa (New York, NY)
24. O Ya (Boston, MA)
25. Bazaar (Los Angeles)
26. The NoMad (New York, NY)
27. Momofuku Ssäm (New York, NY)
28. Vetri (Philadelphia, PA)
29. Inn at Little Washington (Washington, VA)
30. Péhe (New Orleans, LA)
31. Babbo (New York, NY)
32. Canlis (Seattle, WA)
33. Hominy Grill (Charleston, SC)
34. Cosme (New York, NY)
35. Nobu (New York, NY)
36. Cut (Los Angeles, CA)
37. The Publican (Chicago, IL)
38. Gramercy Tavern (New York, NY)
39. Chez Panisse (Berkeley, CA)
40. Chef’s Table at Brooklyn Fare (Brooklyn, NY)
41. Zuni Cafe (San Francisco, CA)
42. Fore Street (Portland, ME)
43. Gotham Bar & Grill (New York, NY)
44. August (New Orleans, LA)
45. Menton (Boston, MA)
46. Estela (New York, NY)
47. Fearing’s (Dallas, TX)
48. Manresa (Los Gatos, CA)
49. Sushi Yasuda (New York, NY)
50. The Barn at Blackberry Farm (Walland, TN)
51. Clio (Boston, MA)
52. Quince (San Francisco)
53. Lucques (Los Angeles, CA)
54. minibar (Washington, DC)
55. City Grocery (Oxford, MS)
56. ABC Kitchen (New York, NY)
57. Animal (Los Angeles, CA)
58. Osteria Mozza (Los Angeles, CA)
59. Frasca Food & Wine (Boulder, CO)
60. Rasika (Washington, DC)
61. Zahav (Philadelphia, PA)
62. State Bird Provisions (San Francisco, LA)
63. Tru (Chicago, IL)
64. Valentino (Santa Monica, CA)
65. Bazaar Meat (Las Vegas, NV)
66. Chi Spacca (Los Angeles, CA)
67. Everest (Chicago, IL)
68. Highland Bar & Grill (Birmingham, AL)
69. Le Pigeon (Portland, OR)
70. The Four Seasons (New York, NY)
71. Peter Chang’s China Grill (Fredericksburg, VA)
72. The Ordinary (Charleston, SC)
73. Trois Mec (New Orleans, LA)
74. é by José Andrés (Las Vegas, NV)
75. Juni (New York, NY)
76. Sushi Nakazawa (New York, NY)
77. Willows Inn (Lummi Island, WA)
78. Bâtard (New York, NY)
79. Gary Danko (San Francisco, CA)
80. Lameire (Richmond, VA)
81. McCrady’s (Charleston, SC)
82. Ippudo (New York, NY)
83. Mission Chinese (San Francisco, CA)
84. Oxheart (Houston, TX)
85. Beast (Portland, OR)
86. Benu (San Francisco, CA)
87. Michael Mina (San Francisco, CA)
88. Topolobampo (Chicago, IL)
89. Underbelly (Houston, TX)
90. The Optimist (Atlanta, GA)
91. Providence (Los Angeles, CA)
92. Camino (Lakland, CA)
93. Carbone (New York, NY)
94. Norman’s (Orlando, FL)
95. Uchi (Austin, TX)
96. Spiaggia (Chicago, IL)
97. The Catbird Seat (Nashville, TN)
98. Roast (Detroit, MI)
99. Jitlada (Los Angeles, CA)
100. Pubbelly (Miami, FL)
101. Ox (Portland, OR)

110.3 Market Resources
The Daily Meal, 156 5th Avenue, Suite 400, New York, NY 10010.
(www.thedailymeal.com)
TOP 100 BEER BARS

111.1 Award Winners 2015

*Draft* designates America’s 100 Best Beer Bars annually. The following are the 2015 designations:

- 7 Monks Taproom (Traverse City, MI)
- Apex (Portland, OR)
- Armsby Abbey (Worcester, MA)
- Avenue Pub (New Orleans, LA)
- Bailey’s TapRoom (Portland, OR)
- Bangers & Lace (Chicago, IL)
- Bazi Bierbrasserie (Portland, OR)
- Beer Bar (Salt Lake City, UT)
- Beer Revolution (Oakland, CA)
- Beer Run (Charlottesville, VA)
- Beer Street (Brooklyn, NY)
- Belmont Station (Portland, OR)
- Beveridge Place Pub (Seattle, WA)
- Bier Station (Kansas City, MO)
- Bierkraft (Brooklyn, NY)
- Blind Lady Ale House (San Diego, CA)
- Blind Tiger (New York, NY)
- Brick Store Pub (Decatur, GA)
- Bridge (St. Louis, MO)
- Brouwerij Lane (Brooklyn, NY)
- Busy Bee Cafe (Raleigh, NC)
- ChurchKey (Washington, DC)
- Closed for Business (Charleston, SC)
- Clubhouse BFD (Rochester Hills, MI)
- Craft and Growler (Dallas, TX)
- Craft Brewed (Nashville, TN)
- Craft Conundrum (Charleston, SC)
- Craft Pride (Austin, TX)
- Crescent Moon (Omaha, NE)
- Deep Ellum (Allston, MA)
- Draught House Pub & Brewery (Austin, TX)
- Ebenezer’s Pub (Lovell, ME)
• El Bait Shop (Des Moines, IA)
• Encinitas Ale House (Encinitas, CA)
• Eulogy Belgian Tavern (Philadelphia, PA)
• Falling Rock Tap House (Denver, CO)
• Firkin (Libertyville, IL)
• Fountainhead (Chicago, IL)
• Growlers Pourhouse (Charlotte, NC)
• HalfCut (Cincinnati, OH)
• Hamilton’s Tavern (San Diego, CA)
• Heorot (Muncie, IN)
• Holy Grail (Louisville, KY)
• Hopleaf (Chicago, IL)
• Hops + Crafts (Nashville, TN)
• Imperial Bottle Shop & Taproom (Portland, OR)
• Krug Park (Omaha, NE)
• Laser Wolf (Ft. Lauderdale, FL)
• Local Option (Chicago, IL)
• Lord Hobo (Cambridge, MA)
• Mahogany Bar (Hattiesburg, MS)
• Map Room (Chicago, IL)
• Max’s Taphouse (Baltimore, MD)
• Memphis Taproom (Philadelphia, PA)
• Mikkeller Bar (San Francisco, CA)
• Mitten Bar (Ludington, MI)
• Monk’s Café (Philadelphia, PA)
• Mr. Beery’s (Sarasota, FL)
• Novare Res Bier Café (Portland, ME)
• O’Brien’s American Pub (San Diego, CA)
• Oak Barrel Tavern (Charleston, SC)
• Palm Tavern (Milwaukee, WI)
• Petrol Station (Houston, TX)
• Pine Box (Seattle, WA)
• Proletariat (New York, NY)
• Rattle N Hum (New York, NY)
• Redlight Redlight (Orlando, FL)
• Republic (Minneapolis, MN)
• Romans’ Pub (Milwaukee, WI)
• Saraveza Bottle Shop & Pasty Tavern (Portland, OR)
• Sergio’s World Beers (Louisville, KY)
• Spuyten Duyvil (Brooklyn, NY)
• Strangelove’s (Philadelphia, PA)
• Strangeways (Dallas, TX)
• Stumbling Monk (Seattle, WA)
• Sugar Maple (Milwaukee, WI)
• Tap and Handle (Fort Collins, CO)
• Tapwerks Ale House (Oklahoma City, OK)
• Teresa’s Next Door (Wayne, PA)
• The Beer Trappe (Lexington, KY)
• The Birch (Norfolk, VA)
• The Brewer’s Art (Baltimore, MD)
• The Grey Lodge Public House (Philadelphia, PA)
• The Happy Gnome (St. Paul, MN)
• The Hay Merchant (Houston, TX)
• The Jeffrey (New York, NY)
• The Mayor of Old Town (Fort Collin, CO)
• The Nook (Huntsville, AL)
• The Porter Beer Bar (Atlanta, GA)
• The Publick House (Brookline, MA)
• The Raleigh Times Bar (Raleigh, NC)
• The Sixgill (Seattle, WA)
• The Surly Goat (West Hollywood, CA)
• The Trappist (Oakland, CA)
• Three Penny Taproom (Montpelier, VT)
• Tiger! Tiger! (North Park, CA)
• Tony’s Darts Away (Burbank, CA)
• Top Hops Beer Shop (New York, NY)
• Torst (Brooklyn, NY)
• Tria Taproom (Philadelphia, PA)
112.1 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 2015, there were more than 3,600 recipients of these awards.

112.2 Award Recipients 2015

U.S. Grand Award recipients for 2015 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)
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WORLD’S BEST RESTAURANTS

113.1 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.

113.2 Award Winners For 2015

Restaurant’s The World’s 50 Best Restaurants list for 2015 is as follows:

1. El Celler de Can Roca (Girona, Spain)
2. Osteria Francescana (Modena, Italy)
3. Noma (Copenhagen, Denmark)
4. Central (Lima, Peru)
5. Eleven Madison Park (New York, NY, United States)
6. Mugaritz (Guipúzcoa, Spain)
7. Dinner by Heston Blumenthal (London, United Kingdom)
8. Narisawa (Tokyo, Japan)
9. D.O.M. (Sao Paolo, Brazil)
10. Gaggan (Bangkok, Thailand)
11. Mirazur (Menton, France)
12. L’arpege (Paris, France)
13. Asador Etxebarri (Bisquay, Spain)
14. Astrid y Gaston (Lima, Peru)
15. Steirereck (Vienna, Austria)
16. Pujol (Mexico City, Mexico)
17. Arzak (San Sebastian, Spain)
18. Le Bernardin (New York, NY, United States)
19. Azurmendi (Larrabetzu, Spain)
20. The Ledbury (London, United Kingdom)
21. Le Chateaubriand (Paris, France)
22. Nahm (Bangkok, Thailand)
23. White Rabbit (Moscow, Russia)
24. Ultraviolet (Shanghai, China)
25. Fäviken (Järpen, Sweden)
26. Alinea (Chicago, IL, United States)
27. Piazza Duomo (Alba, Italy)
28. Test Kitchen (Cape Town, South Africa)
29. RyuGin (Tokyo, Japan)
30. Vendome (Bergisch Gladbach, Germany)
31. Frantzen (Stockholm, Sweden)
32. Attica (Melbourne, Australia)
33. Aqua (Wolfsburg, Germany)
34. Le Calendre (Rubano, Italy)
35. Quintonil (Mexico City, Mexico)
36. L’astrance (Paris, France)
37. Biko (Mexico City, Mexico)
38. Amber (Hong Kong)
39. QuiQue Dacosta (Denia, Spain)
40. Per Se (New York, NY, United States)
41. Mani (Sao Paolo, Brazil)
42. Borago (Santiago, Chile)
42. Tickets (Barcelona, Spain)
44. Maido (Lima, Peru)
45. Relae (Copenhagen, Denmark)
46. Restaurant Andre (Singapore)
47. Ducasse au Plaza Athenée (Paris, France)
48. Schloss Schauenstein (Fürstenau, Switzerland)
49. Blue Hill at Stone Barns (Pocatino Hills, NY, United States)
50. The French Laundry (Yountville, CA, United States)
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ZAGAT SELECTIONS

114.1 Overview
Since 1979, Zagat Survey (www.zagat.com) has published guides based on ratings of restaurants by diners. During the 2000s, the Zagat Survey included 70 cities, with reviews based on the input of over 250,000 individuals. Google acquired Zagat in 2011.

114.2 Fast-Casual Selections
According to August 2015 surveys by Zagat (www.zagat.com), the local/regional favorite fast-casual restaurants are as follows:

**Atlanta, GA**
- Della’s Chicken Sausage Stand
- MetroFresh
- Grindhouse Killer Burgers
- Farm Burger
- Your Pie

**Chicago, IL**
- Tortas Frontera
- Big & Little’s
- Luke’s Lobster
- Leghorn Chicken
- Protein Bar

**Austin, TX**
- Hopdoddy Burger Bar
- Tarka Indian Kitchen
- East Side King
- Ramen Tatsu-ya
- Noble Sandwich Shop

**Dallas, TX**
- Torchy’s Tacos
- Hopdoddy
- BBBop
- East Hampton Sandwich
- Liberty Burger

**Boston, MA**
- Roxy’s Gourmet Grilled Cheese
- Sweetgarden
- Wahlburgers
- SoulFire
- Clover

**Denver, CO**
- Tocabe American Indian Eatery
- Biker Jim’s Gourmet Dogs
- Dog Haus
- Hopdoddy
- Modmarket
### Houston, TX
- Torchy’s Tacos
- Pizaro’s Pizza
- Hubcap Grill
- Local Foods
- Dish Society

### Los Angeles, CA
- Dog Haus
- Wurstküche
- The Larder
- Blaze Pizza
- Tender Greens

### Miami, FL
- Pincho Factory
- Jimmy’z Kitchen
- The Cheese Course
- My Ceviche
- Bobby’s Burger Palace

### New York, NY
- Num Pang
- Mighty Quinn’s Barbeque
- Taim
- Xi’an Famous Foods
- Luke’s Lobster

### Philadelphia, PA
- Paesano’s
- Hai Street Kitchen
- Luke’s Lobster
- Honeygrow
- Hip City Veg

### San Diego, CA
- Carnita’s Snack Shack
- Napizza
- Tender Greens
- The Kebob Shop
- Oscar’s Mexican Food

### San Francisco, CA
- LYFE Kitchen
- Ike’s Place
- Curry Up Now
- Asian Box
- Sushirrito

### Seattle, WA
- Zippy’s
- Marination
- 8 oz. Burger
- Katsu Burger
- Li’l Woody’s

### Washington, DC
- Amsterdam Falafelshop
- Cav Mezze Grill
- G By Mike Isabella
- ShopHouse
- TaKorean

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### 114.3 Selections in Major Cities

#### Best Burgers
- 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: LoKai 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)

**Best Business Lunch**
- Atlanta, GA: Bones
- Austin, TX: Trio
- Boston, MA: Menton
- Chicago, IL: Topolobampo
- Dallas, TX: Mansion Restaurant/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

**Best Business Trip Dining**
- Atlanta, GA: Bacchanalia
- Atlantic City, NJ: Old Homestead
- Austin, TX: Uchi
- Baltimore, MD: Charleston
- Boston, MA: O Yà
- Charlotte, NC: Barrington’s
- Chicago, IL: Les Nomades
• Cincinnati, OH: Boca
• Cleveland, OH: Chez Francois
• Columbus, OH: L’Antibes
• Connecticut: Le Petit Cafe (Branford)
• Dallas/Ft. Worth, TX: Bonnell’s
• Denver, CO: Fruition
• Detroit, MI: Lark
• Fort Lauderdale, FL: La Brochette
• Honolulu, HI: Sushi Sasabune
• Houston, TX: Le Mistral
• Kansas City, MO: Justus Drugstore
• Las Vegas, NV: Joël Robuchon at the Mansion
• Long Island, NY: North Fork Table
• Los Angeles, CA: Matsuhisa
• Miami, FL: Naoe
• Milwaukee, WI: Roots
• Minneapolis/Saint Paul, MN: La Belle Vie
• Naples, FL: Cote d’Azur
• New Jersey: Restaurant Nicholas (Red Bank)
• New Orleans, LA: Bayona
• New York, NY: Le Bernardin
• Orange County, CA: Marche Moderne
• Orlando, FL: Victoria & Albert’s
• Palm Beach, FL: Marcello’s La Sirena
• Philadelphia, PA: Vetri
• Phoenix/Scottsdale, AZ: Kai
• Portland, OR: Painted Lady
• Sacramento, CA: Taste
• Salt Lake City, UT: Mariposa
• San Antonio, TX: Dough
• San Diego, CA: Market
• San Francisco, CA: Gary Danko
• Seattle, WA: Cafe Juanita
• St. Louis, MO: Niche
• Tampa/Sarasota, FL: Beach Bistro
• Tucson, AZ: Fleming’s Prime
• Washington, DC: Marcel’s
• Westchester/Hudson Valley, NY: Sushi Nanase

**Best Hotel Restaurants**

• 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)
• Miami, FL: Palme d’Or (Biltmore)
• Milwaukee, WI: Osteria del Mondo (Knickerbocker)
• Minneapolis, MN: Manny’s Steakhouse (W Minneapolis)
• New Orleans, LA: Stella! (Hotel Provincial)
• New York, NY: Jean Georges (Trump International)
• Orlando, FL: Victoria & Albert’s (Disney’s Grand Floridian)
• 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 City Ctr)
• 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)

Best 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: Mercadito-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
Best Sandwich Restaurant

- 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

Best Service

- Atlanta, GA: Bone’s Restaurant
- Austin, TX: Congress
- Baltimore, MD: Charleston
- Boston, MA: Menton
- Chicago, IL: Next
- Cincinnati, OH: Orchids at Palm Court
- 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)

114.4 Market Resources
Zagat Survey, 76 9\textsuperscript{th} Avenue, 4\textsuperscript{th} Floor, New York, NY 10011. (www.zagat.com)
PART XIII: FOOD & BEVERAGE DESIGNATIONS
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NATIONAL FOOD & BEVERAGE HOLIDAYS

115.1 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.

115.2 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 Gumdrop 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
• 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: National Blueberry Popover 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: National Chicken and Dumplings 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

### 115.3 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)

115.4 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
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STATE FOODS

116.1 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:

116.2 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 (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.culinaryinstitut temi.com)
• Culinary Institute of Michigan, 1903 Marquette Avenue, Muskegon, MI 49442.

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.hospitality.fiu.edu)
• Chaplin School of Hospitality & Tourism Management, Biscayne Bay Campus, 3000 N.E. 151st Street, North Miami, FL 33181

International Culinary Center (www.internationalculinarycenter.com)
• Main Campus: 462 Broadway, New York, NY 10013
• West Coast: 700 West Hamilton Avenue, Campbell, CA 95008

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-arts-as)
• 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
• 310 Ward Parkway, Kansas City, MO 64112

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
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 (http://hospitalitybusiness.broad.msu.edu)
- School of Hospitality Business, 645 N. Shaw Lane, Room 232, East Lansing, MI 48824

- Culinary Academy of South Dakota, 1800 E. Spruce Street, Mitchell, SD 57301

New England Culinary Institute (www.neici.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 (www.sandiegoculinary.edu)
- 8024 La Mesa Boulevard, La Mesa, CA 91941

Southwest Minnesota State University (www.smsu.edu/academics/programs/culinology/Index.cfm)
- Culinology 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 (http://sullivan.edu/national-center-for-hospitality-studies)
• 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 (www.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, 909 Third Avenue, New York, NY 10022. (212) 490-2500. (www.alixpartners.com)

Baum + Whiteman, 912 President Street, Brooklyn, NY 11215. (718) 622-0200. (www.baumwhiteman.com)

Beverage Information Group, 17 High Street, 2nd Floor, Norwalk, CT 06851. (203) 855-8499. (www.bevinfo.com)


Black Box Intelligence, 17304 Preston Road, #430, Dallas, TX 75252. (972) 364-0490. (www.blackboxintelligence.com)

Canadean, 179 South Street, Suite 200, Boston, MA 02111. (617) 747-4100. (www.canadean.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.csgis.com)


Consumer Edge Insight, 1 Landmark Square, Stamford, CT 06901. (203) 504-8122. (www.consumeredgeinsight.com)

Datassential, 18 S. Michigan Avenue, Chicago, IL 60603. (312) 655-0622. (www.datassential.com)
Experian Marketing Services, 29 Broadway, 6th Floor, New York, NY 10006. (866) 256-4468. (www.experian.com/marketing-services/marketing-services.html)

GfK, 200 Liberty Street, 4th Floor, New York, NY 10281. (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)

InMoment, 310 East 4500 South, Suite 450, Salt Lake City, UT 84107. (800) 530-4251. (www.inmoment.com)

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

IRI, 150 North Clinton Street, Chicago, IL 60661. (312) 726-1221. (www.iriworldwide.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)


Ramboll Environ, 4350 Fairfax Drive, #300, Arlington, VA 22203. (703) 516-2300. (www.ramboll-environ.com)

Restaurant Research, LLC, 1 Cricklewood Road, Redding, CT 06896. (203) 938-4703. (www.chainrestaurantdata.com)

Revenue Management Solutions, 777 South Harbour Island Boulevard, Suite 890, Tampa, FL 33602. (813) 277-0034. (www.revenuemanage.com)

Sandelman & Associates, 25790 West Apache Lane, Barrington, IL 60010. (847) 277-7603. (www.sandelman.com)

Scarborough Research (Nielsen), 85 Broad Street, New York, NY 10004. (855) 807-2272. (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 Hartman Group, 3150 Richards Road, Suite 200, Bellevue, WA 98005. (425) 452-0818. (www.hartman-group.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.wdppartners.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, 440 First Street, Suite 350, Washington, DC 20001. (202) 737-2337.  (www.beerinstitute.org)

Brewers Association, P.O. Box 1679, Boulder, CO 80306. (303) 447-0816.  (www.brewersassociation.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)


National Association of Pizzeria Operators, 908 South 8th Street, Suite 200, Louisville, KY 40203. (502) 736-9530.  (www.pizzatoday.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, 1101 New York Avenue NW, Washington, DC 20005. (202) 783-7971.  (www.nccr.net)

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

Research Chefs Association, 1100 Johnson Ferry Road, Suite 300, Atlanta, GA 30342. (678) 298-1178. (www.culinology.com)

Society of Hospitality and Foodservice Management, 328 E. Main Street, Louisville, KY 40202. (502) 574-9931. (www.sfm-online.org)

Specialty Coffee Association of America, 117 W. 4th Street, Suite 300, Santa Ana, CA 92701. (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 Business News, 4801 Main Street, Suite 650, Kansas City, MO 64112. (816) 756-1000. (www.foodbusinessnews.net)

FoodService Director, 1 Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181. (630) 574-5075. (www.foodservicedirector.com)


Nation’s Restaurant News, 1166 Avenue of the Americas, 10th Floor, New York, NY 10036. (212) 204-4200. (www.nrn.com)


Restaurant Business, 1 Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181. (630) 574-5075. (www.restaurantbusinessonline.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 and Retailers Association, 1503 W. 31st Avenue, Suite 202, Anchorage, AK 99503. (907) 274-8133. (www.alaskacharr.com)

Arizona
• Arizona Restaurant Association, 465 W. St. Mary’s Road, #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 Waialae 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.idaho-lodging-restaurants.com)

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 and 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 West Washtenaw Street, Lansing, MI 48933. (517) 482-5244. (www.michiganrestaurant.org)

Minnesota
• Minnesota Restaurant, Lodging, Resort & Campground Association, 1959 Sloan Place, Suite 120, 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.morestaurants.org)
• Missouri Restaurant Association, 4049 Pennsylvania, Suite 204, Kansas City, MO 64111. (816) 753-5222. (www.morestaurants.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 East Tropicana Avenue, Suite 114-A, Las Vegas, NV 89119. (702) 878-2313. (www.nvrestaurants.com)

New Hampshire
• New Hampshire Lodging & Restaurant Association, 16 Centre Street, Concord, NH 03301. (603) 228-9585. (www.nhlra.com)
New Jersey
• New Jersey Restaurant & Hospitality 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 & Lodging Association, 6036 Six Forks Road, Raleigh, NC 27609. (919) 844-0098. (www.ncrla.org)

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.prla.org)

Rhode Island
• Rhode Island Hospitality Association, 94 Sabra Street, Cranston, RI 02910. (401) 223-1120. (www.rihospitality.org)

South Carolina
• South Carolina Restaurant & 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 & Tourism 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.utahrestaurantassociation.org)

Vermont
• Vermont Chamber of Commerce, Hospitality Division, P.O. Box 37, Montpelier, VT 05601. (802) 223-3443. (www.vtchamber.com)

Virginia
• Virginia Restaurant, Lodging & Travel Association, 2101 Libbie Avenue, Richmond, VA 23230. (804) 288-3065. (www.vrlta.org)

Washington
• Washington Restaurant Association, 510 Plum Street S.E., Suite 200, Olympia, WA 98501. (360) 956-7279. (www.warestaurant.org)

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.wirestaurant.org)

Wyoming
• Wyoming Lodging and Restaurant Association, P.O. Box 1003, Cheyenne, WY 82003. (307) 634-8816. (www.wlra.org)
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