## CONTENTS

### PART I: MARKET OVERVIEW

1. **RESTAURANT SALES**
   - 1.1 Overview ................................................................. 26
   - 1.2 Total Sales .............................................................. 26
   - 1.3 Full-Service Restaurant Sales ..................................... 26
   - 1.4 Limited-Service Restaurant Sales ................................. 27
   - 1.5 Bar and Night Club Sales .......................................... 27
   - 1.6 Sales By Month ....................................................... 27

2. **MARKET SUMMARY**
   - 2.1 Overview ............................................................... 28
   - 2.2 Industry Sales ........................................................ 28
   - 2.3 Revenue Distribution .............................................. 30
   - 2.4 Restaurant Sales Growth .......................................... 30
   - 2.5 Restaurant Expenditures .......................................... 30
   - 2.6 Restaurant Performance Index .................................... 31
   - 2.7 Market Resources .................................................. 31

3. **RESTAURANT CENSUS**
   - 3.1 Restaurant Counts .................................................. 33
   - 3.2 Chain Restaurants .................................................. 34
   - 3.3 Market Resources .................................................. 35

4. **RESTAURANT FRANCHISES**
   - 4.1 Overview ............................................................... 36
   - 4.2 Franchise Restaurant Census ...................................... 36
   - 4.3 Market Assessment .................................................. 36
   - 4.4 Employment ........................................................... 37
   - 4.5 Market Resources .................................................. 37

5. **RESTAURANT VISITS**
   - 5.1 Restaurant Visits ................................................... 38
   - 5.2 Dine-In Versus Take-Out ........................................... 38
   - 5.3 Quick-Service and Full-Service Restaurant Visits ........... 39
   - 5.4 Market Resources .................................................. 40

6. **STATE-BY-STATE ANALYSIS**
   - 6.1 Restaurant Sales By State ........................................ 41
6.2 Restaurant Locations By State. ................................................. 42
6.3 Foodservice Employment By State. ........................................... 43

7 REGIONAL TRENDS. ................................................................. 46
7.1 Overview. ................................................................. 46
7.2 Restaurant Sales.......................................................... 46
7.3 Restaurant Customer Traffic.............................................. 47
7.4 Outlook ................................................................. 47
7.5 Market Resources. ......................................................... 48

8 NATIONAL DINING TRENDS SURVEY. ................................. 49
8.1 Overview................................................................. 49
8.2 Dining Out.............................................................. 49
8.3 Trendy Foods And Cuisine............................................... 50
8.4 Dining Preferences...................................................... 51
8.5 Social Media Posts...................................................... 52
8.6 Tipping................................................................. 53
8.7 Market Resources. ......................................................... 53

9 HOW AMERICANS EAT ............................................................. 54
9.1 The U.S. Food Dollar..................................................... 54
9.2 Distribution Of Daily Food Consumption............................. 54
9.3 Meal Sources............................................................ 56
9.4 Compliance With Dietary Guidelines................................. 57
9.5 Trends................................................................. 58
9.6 Market Resources. ......................................................... 58

10 DINING OUT - DEMOGRAPHICS.................................................. 59
10.1 Overview............................................................... 59
10.2 Dining By Restaurant Type.......................................... 59
10.3 Factors In Choosing A Restaurant................................... 60
10.4 Cuisine............................................................... 60
10.5 Market Resources. ......................................................... 61

11 DINING OUT - FREQUENCY....................................................... 62
11.1 Overview............................................................... 62
11.2 Dining Frequency....................................................... 63
11.3 Dining Out By Household Income And Age....................... 63
11.4 Market Resources. ......................................................... 64

12 PUBLICLY TRADED RESTAURANT CORPORATIONS.................. 65
12.1 Overview............................................................... 65
12.2 Restaurant Stocks and Market Capitalization....................... 65
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>19.2 Restaurant Visits By Millennials.</td>
<td>98</td>
</tr>
<tr>
<td>19.3 Dining Out</td>
<td>99</td>
</tr>
<tr>
<td>19.4 Preferred Restaurants For Dinner.</td>
<td>100</td>
</tr>
<tr>
<td>19.5 Dining Priorities</td>
<td>100</td>
</tr>
<tr>
<td>19.6 Favorite Restaurant Chains.</td>
<td>101</td>
</tr>
<tr>
<td>20 GENERATION Z CUSTOMERS</td>
<td>102</td>
</tr>
<tr>
<td>20.1 Overview</td>
<td>102</td>
</tr>
<tr>
<td>20.2 Restaurant Visits By Generation Zs.</td>
<td>102</td>
</tr>
<tr>
<td>20.3 Restaurant Spending By Teens.</td>
<td>103</td>
</tr>
<tr>
<td>20.4 Favorite Restaurant Chains.</td>
<td>103</td>
</tr>
<tr>
<td>21 CONSUMER PREFERENCES</td>
<td>104</td>
</tr>
<tr>
<td>21.1 Overview</td>
<td>104</td>
</tr>
<tr>
<td>21.2 Factors Contributing To High Customer Satisfaction.</td>
<td>104</td>
</tr>
<tr>
<td>21.3 Market Resources</td>
<td>118</td>
</tr>
<tr>
<td>22 CUSTOMER SATISFACTION</td>
<td>119</td>
</tr>
<tr>
<td>22.1 Overview</td>
<td>119</td>
</tr>
<tr>
<td>22.2 ACSI Scores</td>
<td>119</td>
</tr>
<tr>
<td>22.3 Customer Satisfaction Scores.</td>
<td>119</td>
</tr>
<tr>
<td>22.4 Market Resources</td>
<td>120</td>
</tr>
<tr>
<td>PART IV: THE MEAL</td>
<td>121</td>
</tr>
<tr>
<td>23 CUISINE</td>
<td>122</td>
</tr>
<tr>
<td>23.1 Regional Cuisine</td>
<td>122</td>
</tr>
<tr>
<td>23.2 Ethnic Cuisine</td>
<td>124</td>
</tr>
<tr>
<td>24 DAYPARTS</td>
<td>128</td>
</tr>
<tr>
<td>24.1 Daypart Traffic</td>
<td>128</td>
</tr>
<tr>
<td>24.2 Breakfast</td>
<td>129</td>
</tr>
<tr>
<td>24.3 Lunch</td>
<td>130</td>
</tr>
<tr>
<td>24.4 Dinner</td>
<td>132</td>
</tr>
<tr>
<td>24.5 Late-Night</td>
<td>133</td>
</tr>
<tr>
<td>25 MEALPARTS</td>
<td>134</td>
</tr>
<tr>
<td>25.1 Overview</td>
<td>134</td>
</tr>
<tr>
<td>25.2 Appetizers</td>
<td>135</td>
</tr>
<tr>
<td>25.3 Dessert</td>
<td>136</td>
</tr>
<tr>
<td>25.4 Entrees</td>
<td>137</td>
</tr>
<tr>
<td>25.5 Salads</td>
<td>138</td>
</tr>
<tr>
<td>25.6 Sides</td>
<td>139</td>
</tr>
<tr>
<td>25.7 Soups</td>
<td>140</td>
</tr>
<tr>
<td>Section</td>
<td>Title</td>
</tr>
<tr>
<td>---------</td>
<td>-------</td>
</tr>
<tr>
<td>26</td>
<td>MENU ITEMS</td>
</tr>
<tr>
<td>26.1</td>
<td>Beef &amp; Pork</td>
</tr>
<tr>
<td>26.2</td>
<td>Breakfast All Day</td>
</tr>
<tr>
<td>26.3</td>
<td>Burgers</td>
</tr>
<tr>
<td>26.4</td>
<td>Cake &amp; Pie</td>
</tr>
<tr>
<td>26.5</td>
<td>Chicken</td>
</tr>
<tr>
<td>26.6</td>
<td>Eggs</td>
</tr>
<tr>
<td>26.7</td>
<td>Fries</td>
</tr>
<tr>
<td>26.8</td>
<td>Hot Dogs &amp; Sausages</td>
</tr>
<tr>
<td>26.9</td>
<td>Pizza</td>
</tr>
<tr>
<td>26.10</td>
<td>Sandwiches</td>
</tr>
<tr>
<td>26.11</td>
<td>Seafood</td>
</tr>
<tr>
<td>26.12</td>
<td>Whole Grains</td>
</tr>
<tr>
<td>27</td>
<td>SNACKS</td>
</tr>
<tr>
<td>27.1</td>
<td>Overview</td>
</tr>
<tr>
<td>27.2</td>
<td>Market Assessment</td>
</tr>
<tr>
<td>27.3</td>
<td>Restaurant Snacks</td>
</tr>
<tr>
<td>27.4</td>
<td>Snacking Throughout The Day</td>
</tr>
<tr>
<td>27.5</td>
<td>Favorite Snacks</td>
</tr>
<tr>
<td>PART V:</td>
<td>CITY-BY-CITY ANALYSIS</td>
</tr>
<tr>
<td>28</td>
<td>DINING OUT</td>
</tr>
<tr>
<td>28.1</td>
<td>Restaurant Visits</td>
</tr>
<tr>
<td>28.2</td>
<td>Full-Service Restaurant Visits</td>
</tr>
<tr>
<td>28.3</td>
<td>Quick-Service Restaurant Visits</td>
</tr>
<tr>
<td>28.4</td>
<td>Market Resources</td>
</tr>
<tr>
<td>29</td>
<td>RESTAURANT SALES</td>
</tr>
<tr>
<td>29.1</td>
<td>Overview</td>
</tr>
<tr>
<td>29.2</td>
<td>Restaurant Sales, Unit Counts, and Sales Per Unit</td>
</tr>
<tr>
<td>29.3</td>
<td>Market Resources</td>
</tr>
<tr>
<td>30</td>
<td>MARKET GROWTH POTENTIAL</td>
</tr>
<tr>
<td>30.1</td>
<td>Overview</td>
</tr>
<tr>
<td>30.2</td>
<td>Growth Potential for MSAs</td>
</tr>
<tr>
<td>30.3</td>
<td>Market Resources</td>
</tr>
<tr>
<td>PART VI:</td>
<td>MARKET SEGMENTS</td>
</tr>
<tr>
<td>31</td>
<td>CASUAL-DINING RESTAURANTS</td>
</tr>
<tr>
<td>31.1</td>
<td>Profile</td>
</tr>
<tr>
<td>Section</td>
<td>Page</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>FINE DINING</td>
<td>226</td>
</tr>
<tr>
<td>39.1 Market Assessment.</td>
<td>226</td>
</tr>
<tr>
<td>39.2 Market Trends.</td>
<td>226</td>
</tr>
<tr>
<td>39.3 Survey On Fine Dining.</td>
<td>227</td>
</tr>
<tr>
<td>FOOD CONCESSIONS AT AIRPORTS.</td>
<td>228</td>
</tr>
<tr>
<td>40.1 Market Assessment.</td>
<td>228</td>
</tr>
<tr>
<td>40.2 Market Leaders.</td>
<td>229</td>
</tr>
<tr>
<td>40.3 Top Airport Restaurants.</td>
<td>229</td>
</tr>
<tr>
<td>40.4 Market Resources.</td>
<td>232</td>
</tr>
<tr>
<td>FOOD CONCESSIONS AT SPORTS VENUES.</td>
<td>233</td>
</tr>
<tr>
<td>41.1 Market Assessment.</td>
<td>233</td>
</tr>
<tr>
<td>41.2 Concessionaires.</td>
<td>234</td>
</tr>
<tr>
<td>41.3 Best Food At Stadiums And Arenas.</td>
<td>234</td>
</tr>
<tr>
<td>FOOD COURTS</td>
<td>238</td>
</tr>
<tr>
<td>42.1 Overview.</td>
<td>238</td>
</tr>
<tr>
<td>42.2 Market Assessment.</td>
<td>238</td>
</tr>
<tr>
<td>42.3 Mall-Based Food Courts.</td>
<td>238</td>
</tr>
<tr>
<td>42.4 Service Plaza Food Courts.</td>
<td>239</td>
</tr>
<tr>
<td>42.5 Top Food Courts.</td>
<td>239</td>
</tr>
<tr>
<td>42.6 Market Resources.</td>
<td>240</td>
</tr>
<tr>
<td>FOOD HALLS</td>
<td>241</td>
</tr>
<tr>
<td>43.1 Overview.</td>
<td>241</td>
</tr>
<tr>
<td>43.2 Popular Food Halls.</td>
<td>241</td>
</tr>
<tr>
<td>43.3 List of Food Halls.</td>
<td>242</td>
</tr>
<tr>
<td>FOOD TRUCKS</td>
<td>245</td>
</tr>
<tr>
<td>44.1 Market Assessment.</td>
<td>245</td>
</tr>
<tr>
<td>44.2 City-by-City Assessment.</td>
<td>246</td>
</tr>
<tr>
<td>44.3 Local Regulations.</td>
<td>247</td>
</tr>
<tr>
<td>44.4 Coexisting With Traditional Restaurants.</td>
<td>247</td>
</tr>
<tr>
<td>44.5 Best Food Trucks.</td>
<td>249</td>
</tr>
<tr>
<td>44.6 Market Resources.</td>
<td>251</td>
</tr>
<tr>
<td>PIZZERIAS</td>
<td>252</td>
</tr>
<tr>
<td>45.1 Market Assessment.</td>
<td>252</td>
</tr>
<tr>
<td>45.2 Segment Trends.</td>
<td>252</td>
</tr>
<tr>
<td>45.3 Takeout And Delivery.</td>
<td>253</td>
</tr>
<tr>
<td>45.4 Fast-Casual Pizza Chains.</td>
<td>253</td>
</tr>
<tr>
<td>45.5 Customer Priorities.</td>
<td>254</td>
</tr>
<tr>
<td>45.6 Market Resources.</td>
<td>255</td>
</tr>
</tbody>
</table>
63 THE NEXT 20 ................................................................. 328
  63.1 Overview ................................................................. 328
  63.2 2017’s Next 20 ............................................................. 328
  63.3 2016’s Next 20 ............................................................. 329
  63.4 Market Resources ......................................................... 329

64 TOP NEWCOMERS ........................................................ 330
  64.1 Overview ................................................................. 330
  64.2 Newcomers List 2017 ..................................................... 330
  64.3 Market Resources ......................................................... 330

PART IX: DINING TRENDS & ANALYSES .......................... 331

65 CELEBRITY CHEFS ........................................................ 332
  65.1 Cooking Shows On Television ........................................... 332
  65.2 Most Popular Chefs On Television ..................................... 332
  65.3 Top-Earning Chefs ....................................................... 334

66 CHILDREN’S MEALS ....................................................... 336
  66.1 The Kids LiveWell Initiative ............................................. 336
  66.2 Emphasis Among Restaurant Chefs .................................... 336
  66.3 Healthful Kids’ Menus At QSRs ....................................... 336
  66.4 School Meals ............................................................... 337
  66.5 Market Resources ......................................................... 338

67 DINING WHILE TRAVELING .......................................... 339
  67.1 Traveler Dining ............................................................. 339
  67.2 Culinary Destinations .................................................... 339
  67.3 Sampling Tours ............................................................. 339
  67.4 Winery Tours ............................................................... 340
  67.5 Whiskey and Bourbon Trails .......................................... 341
  67.6 Market Resources ......................................................... 342

68 DINING WITH ENTERTAINMENT .................................... 343
  68.1 Overview ................................................................. 343
  68.2 Music-Themed Restaurants ............................................. 343
  68.3 Experiential Restaurants ............................................... 344
  68.4 Mystery Dinner Theaters ............................................... 345
  68.5 Dinner and a Movie ....................................................... 345
  68.6 Speakeasies ................................................................. 346
  68.7 Unique Concept Restaurants ......................................... 347

69 DOG-FRIENDLY RESTAURANTS .................................... 349
  69.1 Overview ................................................................. 349
<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>69.2</td>
<td>Dog-friendly Restaurants</td>
<td>349</td>
</tr>
<tr>
<td>69.3</td>
<td>Dog Menus</td>
<td>350</td>
</tr>
<tr>
<td>69.4</td>
<td>Market Resources</td>
<td>351</td>
</tr>
<tr>
<td>70</td>
<td>FOOD &amp; WINE FESTIVALS</td>
<td>352</td>
</tr>
<tr>
<td>70.1</td>
<td>Overview</td>
<td>352</td>
</tr>
<tr>
<td>70.2</td>
<td>Prominent Food Festivals</td>
<td>352</td>
</tr>
<tr>
<td>70.3</td>
<td>Market Resources</td>
<td>353</td>
</tr>
<tr>
<td>71</td>
<td>FOOD SAFETY</td>
<td>354</td>
</tr>
<tr>
<td>71.1</td>
<td>Overview</td>
<td>354</td>
</tr>
<tr>
<td>71.2</td>
<td>Consumer Response To Food Safety</td>
<td>355</td>
</tr>
<tr>
<td>71.3</td>
<td>Dining Grades</td>
<td>355</td>
</tr>
<tr>
<td>71.4</td>
<td>Market Resources</td>
<td>355</td>
</tr>
<tr>
<td>72</td>
<td>HEALTHY DINING</td>
<td>356</td>
</tr>
<tr>
<td>72.1</td>
<td>Healthy Dining</td>
<td>356</td>
</tr>
<tr>
<td>72.2</td>
<td>Federal Guidelines</td>
<td>357</td>
</tr>
<tr>
<td>72.3</td>
<td>What Foods Are Healthy?</td>
<td>357</td>
</tr>
<tr>
<td>72.4</td>
<td>Priorities in Health-Conscious Eating</td>
<td>359</td>
</tr>
<tr>
<td>72.5</td>
<td>Food Additives</td>
<td>359</td>
</tr>
<tr>
<td>72.6</td>
<td>Genetically Modified Foods</td>
<td>360</td>
</tr>
<tr>
<td>72.7</td>
<td>Sugar Consumption</td>
<td>360</td>
</tr>
<tr>
<td>72.8</td>
<td>Reduced Sodium</td>
<td>360</td>
</tr>
<tr>
<td>72.9</td>
<td>Dieting</td>
<td>361</td>
</tr>
<tr>
<td>72.10</td>
<td>Portion Control</td>
<td>362</td>
</tr>
<tr>
<td>73</td>
<td>HOLIDAY DINING</td>
<td>363</td>
</tr>
<tr>
<td>73.1</td>
<td>Overview</td>
<td>363</td>
</tr>
<tr>
<td>73.2</td>
<td>Birthdays</td>
<td>363</td>
</tr>
<tr>
<td>73.3</td>
<td>Mother’s Day</td>
<td>363</td>
</tr>
<tr>
<td>73.4</td>
<td>Valentine’s Day</td>
<td>364</td>
</tr>
<tr>
<td>73.5</td>
<td>Father’s Day</td>
<td>365</td>
</tr>
<tr>
<td>73.6</td>
<td>New Year’s Eve</td>
<td>365</td>
</tr>
<tr>
<td>73.7</td>
<td>Easter</td>
<td>365</td>
</tr>
<tr>
<td>73.8</td>
<td>Thanksgiving</td>
<td>365</td>
</tr>
<tr>
<td>73.9</td>
<td>St. Patrick’s Day</td>
<td>366</td>
</tr>
<tr>
<td>73.10</td>
<td>Oktoberfest</td>
<td>366</td>
</tr>
<tr>
<td>73.11</td>
<td>Super Bowl Sunday</td>
<td>367</td>
</tr>
<tr>
<td>74</td>
<td>LICENSING</td>
<td>368</td>
</tr>
<tr>
<td>74.1</td>
<td>Market Assessment</td>
<td>368</td>
</tr>
<tr>
<td>74.2</td>
<td>Licensed Food Products</td>
<td>368</td>
</tr>
<tr>
<td>Section</td>
<td>Title</td>
<td>Page</td>
</tr>
<tr>
<td>---------</td>
<td>-------</td>
<td>------</td>
</tr>
<tr>
<td>75</td>
<td>LOCALLY SOURCED &amp; ORGANIC FOOD</td>
<td>370</td>
</tr>
<tr>
<td>75.1</td>
<td>Local &amp; Organic Preferences Among Consumers.</td>
<td>370</td>
</tr>
<tr>
<td>75.2</td>
<td>Locavores.</td>
<td>371</td>
</tr>
<tr>
<td>75.3</td>
<td>Local Sourcing At Limited-Service Restaurants.</td>
<td>372</td>
</tr>
<tr>
<td>75.4</td>
<td>Chef- and Restaurant-owned Farms.</td>
<td>373</td>
</tr>
<tr>
<td>75.5</td>
<td>Organic Menus.</td>
<td>374</td>
</tr>
<tr>
<td>76</td>
<td>LOYALTY PROGRAMS</td>
<td>375</td>
</tr>
<tr>
<td>76.1</td>
<td>Overview.</td>
<td>375</td>
</tr>
<tr>
<td>76.2</td>
<td>Restaurant Programs.</td>
<td>375</td>
</tr>
<tr>
<td>76.3</td>
<td>Customer Participation.</td>
<td>376</td>
</tr>
<tr>
<td>76.4</td>
<td>Restaurant Loyalty Programs.</td>
<td>376</td>
</tr>
<tr>
<td>77</td>
<td>MEAL KITS.</td>
<td>379</td>
</tr>
<tr>
<td>77.1</td>
<td>The Meal-Kit Customer.</td>
<td>379</td>
</tr>
<tr>
<td>77.2</td>
<td>Market Assessment.</td>
<td>380</td>
</tr>
<tr>
<td>77.3</td>
<td>Key Players.</td>
<td>380</td>
</tr>
<tr>
<td>78</td>
<td>RESTRICTIVE DIET MENUS.</td>
<td>381</td>
</tr>
<tr>
<td>78.1</td>
<td>Overview.</td>
<td>381</td>
</tr>
<tr>
<td>78.2</td>
<td>Gluten-Free Menu Items.</td>
<td>381</td>
</tr>
<tr>
<td>78.3</td>
<td>Kosher Cuisine.</td>
<td>383</td>
</tr>
<tr>
<td>78.4</td>
<td>Halal Foods.</td>
<td>384</td>
</tr>
<tr>
<td>78.5</td>
<td>Vegetarian Cuisine.</td>
<td>384</td>
</tr>
<tr>
<td>79</td>
<td>SUSTAINABILITY.</td>
<td>386</td>
</tr>
<tr>
<td>79.1</td>
<td>Overview.</td>
<td>386</td>
</tr>
<tr>
<td>79.2</td>
<td>Conserve Program.</td>
<td>386</td>
</tr>
<tr>
<td>79.3</td>
<td>Top Sustainable Restaurants.</td>
<td>387</td>
</tr>
<tr>
<td>80</td>
<td>TAKEOUT &amp; DELIVERY.</td>
<td>388</td>
</tr>
<tr>
<td>80.1</td>
<td>Market Assessment.</td>
<td>388</td>
</tr>
<tr>
<td>80.2</td>
<td>Takeout and The American Lifestyle.</td>
<td>388</td>
</tr>
<tr>
<td>80.3</td>
<td>Trends In Takeout And Off-Premise Dining.</td>
<td>388</td>
</tr>
<tr>
<td>80.4</td>
<td>Takeout At Full-Service Chains.</td>
<td>390</td>
</tr>
<tr>
<td>80.5</td>
<td>Pizza Delivery.</td>
<td>390</td>
</tr>
<tr>
<td>80.6</td>
<td>To-Go Packaging.</td>
<td>391</td>
</tr>
<tr>
<td>80.7</td>
<td>App-Based Meal Delivery Services.</td>
<td>391</td>
</tr>
<tr>
<td>PART X: DINING &amp; THE INTERNET.</td>
<td>392</td>
<td></td>
</tr>
<tr>
<td>81</td>
<td>USE OF THE INTERNET &amp; MOBILE FOR DINING.</td>
<td>393</td>
</tr>
<tr>
<td>81.1</td>
<td>Restaurant Technology.</td>
<td>393</td>
</tr>
<tr>
<td>81.2</td>
<td>Dining Activities Via Mobile Devices.</td>
<td>393</td>
</tr>
<tr>
<td>Section</td>
<td>Title</td>
<td>Page</td>
</tr>
<tr>
<td>---------</td>
<td>-------</td>
<td>------</td>
</tr>
<tr>
<td>81.3</td>
<td>Restaurant Mobile Apps.</td>
<td>394</td>
</tr>
<tr>
<td>81.4</td>
<td>Online Reviews.</td>
<td>395</td>
</tr>
<tr>
<td>81.5</td>
<td>Mobile Payment.</td>
<td>395</td>
</tr>
<tr>
<td>81.6</td>
<td>Preferred Communications.</td>
<td>396</td>
</tr>
<tr>
<td>82</td>
<td><strong>ONLINE RESERVATIONS.</strong></td>
<td>397</td>
</tr>
<tr>
<td>82.1</td>
<td>Online Reservations.</td>
<td>397</td>
</tr>
<tr>
<td>82.2</td>
<td>Profiles Of Key Players.</td>
<td>397</td>
</tr>
<tr>
<td>83</td>
<td><strong>ONLINE &amp; MOBILE ORDERING.</strong></td>
<td>400</td>
</tr>
<tr>
<td>83.1</td>
<td>Overview.</td>
<td>400</td>
</tr>
<tr>
<td>83.2</td>
<td>Digital Ordering.</td>
<td>400</td>
</tr>
<tr>
<td>83.3</td>
<td>Mobile Ordering.</td>
<td>401</td>
</tr>
<tr>
<td>83.4</td>
<td>Digital Orders For Pizza Chains.</td>
<td>402</td>
</tr>
<tr>
<td>84</td>
<td><strong>APP-BASED DELIVERY SERVICES.</strong></td>
<td>403</td>
</tr>
<tr>
<td>84.1</td>
<td>Overview.</td>
<td>403</td>
</tr>
<tr>
<td>84.2</td>
<td>Preferred Delivery Services.</td>
<td>404</td>
</tr>
<tr>
<td>84.3</td>
<td>Profiles Of Key Players.</td>
<td>404</td>
</tr>
<tr>
<td>85</td>
<td><strong>SOCIAL NETWORKING.</strong></td>
<td>407</td>
</tr>
<tr>
<td>85.1</td>
<td>Overview.</td>
<td>407</td>
</tr>
<tr>
<td>85.2</td>
<td>Restaurant Social Media Index.</td>
<td>407</td>
</tr>
<tr>
<td>85.3</td>
<td>Market Resources.</td>
<td>408</td>
</tr>
<tr>
<td><strong>PART XI:</strong></td>
<td><strong>BEVERAGE TRENDS &amp; ANALYSES.</strong></td>
<td>409</td>
</tr>
<tr>
<td>86</td>
<td><strong>BEVERAGE CONSUMPTION &amp; SPENDING.</strong></td>
<td>410</td>
</tr>
<tr>
<td>86.1</td>
<td>Beverage Consumption.</td>
<td>410</td>
</tr>
<tr>
<td>86.2</td>
<td>Beverage Spending.</td>
<td>410</td>
</tr>
<tr>
<td>86.3</td>
<td>Alcoholic Beverages.</td>
<td>410</td>
</tr>
<tr>
<td>86.4</td>
<td>Nonalcoholic Beverages.</td>
<td>414</td>
</tr>
<tr>
<td>87</td>
<td><strong>BEER.</strong></td>
<td>416</td>
</tr>
<tr>
<td>87.1</td>
<td>Market Assessment.</td>
<td>416</td>
</tr>
<tr>
<td>87.2</td>
<td>Market Leaders.</td>
<td>417</td>
</tr>
<tr>
<td>87.3</td>
<td>Top Domestic Beer Brands.</td>
<td>417</td>
</tr>
<tr>
<td>87.4</td>
<td>Demographics.</td>
<td>418</td>
</tr>
<tr>
<td>87.5</td>
<td>Craft Beer.</td>
<td>419</td>
</tr>
<tr>
<td>87.6</td>
<td>Imported Beer.</td>
<td>420</td>
</tr>
<tr>
<td>87.7</td>
<td>Cider.</td>
<td>421</td>
</tr>
<tr>
<td>87.8</td>
<td>On-Premise Consumption.</td>
<td>421</td>
</tr>
<tr>
<td>87.9</td>
<td>Market Resources.</td>
<td>422</td>
</tr>
</tbody>
</table>
88  DISTILLED SPIRITS. ................................................................. 423
  88.1 Market Assessment. .......................................................... 423
  88.2 Major Brands. ................................................................. 424
  88.3 Brandy and Cognac. ......................................................... 425
  88.4 Cordials and Liqueurs. ...................................................... 426
  88.5 Gin. ................................................................................. 427
  88.6 RTD Cocktails. ................................................................. 428
  88.7 Rum. ................................................................................. 428
  88.8 Tequila. .............................................................................. 430
  88.9 Vodka. ............................................................................... 431
  88.10 Whiskey. .......................................................................... 432
  88.11 Market Resources. ......................................................... 435

89  WINE. ..................................................................................... 436
  89.1 Market Assessment. .......................................................... 436
  89.2 Market Leaders. ................................................................. 438
  89.3 Wine Consumer Characteristics. ........................................ 438
  89.4 Wine Consumer Demographics. ....................................... 440
  89.5 Oneophiles. ......................................................................... 440
  89.6 Market Resources. ............................................................ 440

90  CARBONATED SOFT DRINKS. .................................................. 441
  90.1 Overview. ........................................................................... 441
  90.2 Market Assessment. .......................................................... 441
  90.3 Consumption. ...................................................................... 442
  90.4 Market Leaders. ................................................................. 443
  90.5 Heavy Soft Drink Consumers. ........................................... 443

91  FUNCTIONAL BEVERAGES. ..................................................... 445
  91.1 Energy Drinks. .................................................................... 445
  91.2 Sports Drinks. ...................................................................... 446
  91.3 Protein Drinks. .................................................................... 447
  91.4 Functional Water. ............................................................... 448
  91.5 Relaxation Beverages. ......................................................... 448
  91.6 Drinkable Meals. ................................................................. 449

92  JUICE & FRUIT DRINKS. ............................................................ 451
  92.1 Overview. ........................................................................... 451
  92.2 Market Assessment. .......................................................... 451
  92.3 Market Leaders. ................................................................. 453
  92.4 RTD Juice and Smoothies. ................................................... 453

93  COFFEE. .................................................................................. 454
  93.1 Consumption. ..................................................................... 454
<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>108</td>
<td>GREAT SEAFOOD RESTAURANTS</td>
<td>512</td>
</tr>
<tr>
<td>108.1</td>
<td>Overview</td>
<td>512</td>
</tr>
<tr>
<td>108.2</td>
<td>List Of Recognitions</td>
<td>512</td>
</tr>
<tr>
<td>109</td>
<td>GREAT STEAK HOUSES</td>
<td>516</td>
</tr>
<tr>
<td>109.1</td>
<td>Overview</td>
<td>516</td>
</tr>
<tr>
<td>109.2</td>
<td>List Of Recognitions</td>
<td>516</td>
</tr>
<tr>
<td>110</td>
<td>JAMES BEARD FOUNDATION AWARDS</td>
<td>519</td>
</tr>
<tr>
<td>110.1</td>
<td>Overview</td>
<td>519</td>
</tr>
<tr>
<td>110.2</td>
<td>Award Winners 2017</td>
<td>519</td>
</tr>
<tr>
<td>110.3</td>
<td>Recent Award Winners</td>
<td>521</td>
</tr>
<tr>
<td>110.4</td>
<td>Market Resources</td>
<td>521</td>
</tr>
<tr>
<td>111</td>
<td>MENU MASTERS AWARDS</td>
<td>522</td>
</tr>
<tr>
<td>111.1</td>
<td>Overview</td>
<td>522</td>
</tr>
<tr>
<td>111.2</td>
<td>Winners By Category</td>
<td>522</td>
</tr>
<tr>
<td>111.3</td>
<td>Market Resources</td>
<td>524</td>
</tr>
<tr>
<td>112</td>
<td>MICHELIN 3-STAR RESTAURANTS</td>
<td>525</td>
</tr>
<tr>
<td>112.1</td>
<td>Overview</td>
<td>525</td>
</tr>
<tr>
<td>112.2</td>
<td>Chicago 3-Star Restaurant</td>
<td>525</td>
</tr>
<tr>
<td>112.3</td>
<td>New York 3-Star Restaurants</td>
<td>525</td>
</tr>
<tr>
<td>112.4</td>
<td>San Francisco and Napa Region 3-Star Restaurants</td>
<td>525</td>
</tr>
<tr>
<td>113</td>
<td>OPEN TABLE'S BEST RESTAURANTS</td>
<td>526</td>
</tr>
<tr>
<td>113.1</td>
<td>Overview</td>
<td>526</td>
</tr>
<tr>
<td>113.2</td>
<td>Best Restaurants In America 2016</td>
<td>526</td>
</tr>
<tr>
<td>113.3</td>
<td>Market Resources</td>
<td>528</td>
</tr>
<tr>
<td>114</td>
<td>RESTAURANT NEIGHBOR AWARD</td>
<td>529</td>
</tr>
<tr>
<td>114.1</td>
<td>Award Winners 2017</td>
<td>529</td>
</tr>
<tr>
<td>115</td>
<td>TRAVELERS' CHOICE AWARDS</td>
<td>534</td>
</tr>
<tr>
<td>115.1</td>
<td>Overview</td>
<td>534</td>
</tr>
<tr>
<td>115.2</td>
<td>Awards 2017</td>
<td>534</td>
</tr>
<tr>
<td>115.3</td>
<td>Market Resources</td>
<td>535</td>
</tr>
<tr>
<td>116</td>
<td>TOP COCKTAILS: RESTAURANT HOSPITALITY</td>
<td>536</td>
</tr>
<tr>
<td>116.1</td>
<td>Overview</td>
<td>536</td>
</tr>
<tr>
<td>116.2</td>
<td>Best Cocktails in America</td>
<td>536</td>
</tr>
<tr>
<td>116.3</td>
<td>Market Resources</td>
<td>538</td>
</tr>
</tbody>
</table>
117  TOP RESTAURANTS: GAYOT .................................................. 539
   117.1 Overview ................................................................. 539
   117.2 Selections 2016 ....................................................... 539
   117.3 Market Resources ..................................................... 540

118  TOP RESTAURANTS: THE DAILY MEAL ............................. 541
   118.1 Overview ................................................................. 541
   118.2 Top Selections 2017 .................................................. 541
   118.3 Market Resources ..................................................... 543

119  TOP NEIGHBORHOOD GEM RESTAURANTS: OPENTABLE .... 544
   119.1 Overview ................................................................. 544
   119.2 Designations 2017 ..................................................... 544
   119.3 Market Resources ..................................................... 546

120  TOP BEER BARS: DRAFT MAGAZINE ................................. 547
   120.1 Award Winners 2017 .................................................. 547

121  TOP PIZZERIAS: THE DAILY MEAL .................................... 550
   121.1 Award Winners 2017 .................................................. 550

122  WINE SPECTATOR GRAND AWARD .................................... 553
   122.1 Overview ................................................................. 553
   122.2 Award Recipients 2017 .............................................. 553

123  WORLD’S BEST RESTAURANTS: RESTAURANT MAGAZINE .... 556
   123.1 Best Restaurants ...................................................... 556
   123.2 Award Winners For 2017 ............................................. 556

124  ZAGAT SELECTIONS ......................................................... 558
   124.1 Overview ................................................................. 558
   124.2 Selections in Major Cities ......................................... 558
   124.3 Market Resources ..................................................... 563

PART XIII: FOOD & BEVERAGE HOLIDAYS ................................. 564

125  NATIONAL FOOD & BEVERAGE HOLIDAYS ......................... 565
   125.1 Overview ................................................................. 565
   125.2 National Food & Beverage Days .................................. 565
   125.3 National Food & Beverage Weeks ................................ 577
   125.4 National Food & Beverage Months ............................... 578
126  STATE FOODS. ................................................................. 582
  126.1 Overview. ............................................................... 582
  126.2 List of Official State Foods........................................... 582

APPENDIX A - ACADEMIC PROGRAMS. ................................. 586

APPENDIX B - ANALYSTS & MARKET CONSULTANTS. .............. 591

APPENDIX C - ASSOCIATIONS. .............................................. 594

APPENDIX D - PERIODICALS. ................................................. 596

APPENDIX E - STATE RESTAURANT ASSOCIATIONS. ............... 598

REFERENCES................................................................. 603
PART I: MARKET OVERVIEW
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: $542.2 billion
- 2014: $575.2 billion
- 2015: $621.7 billion
- 2016: $658.6 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: $234.6 billion
- 2014: $252.3 billion
- 2015: $274.8 billion
- 2016: $291.4 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: $235.7 billion
- 2014: $248.4 billion
- 2015: $269.3 billion
- 2016: $285.8 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: $21.7 billion
- 2015: $22.4 billion
- 2016: $23.7 billion

1.6 Sales By Month
In 2016, monthly sales for all food services and drinking places were as follows:
- January: $50.2 billion
- February: $51.7 billion
- March: $56.1 billion
- April: $56.6 billion
- May: $57.3 billion
- June: $54.9 billion
- July: $56.3 billion
- August: $55.4 billion
- September: $54.3 billion
- October: $55.6 billion
- November: $53.1 billion
- December: $57.1 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 14.7 million people.

2.2 Industry Sales
The National Restaurant Association (www.restaurant.org) assessed total restaurant industry sales at $798.7 billion in 2017, an increase of 4.3% from the previous year. Adjusted for inflation, 2017 projected restaurant-industry sales represent a 1.7% gain over 2016, up from the 1.5% gain in 2016 over 2015.

Distribution of sales for 2017 are assessed as follows:

COMMERCIAL RESTAURANT SERVICES
- Restaurants: $551.7 billion
- Managed services: $53.6 billion
- Retail-host restaurants: $42.3 billion
- Hotel restaurants: $36.1 billion
- Recreation, sports, mobile, vending, and other: $32.9 billion
- Bars and taverns: $19.8 billion
- Total: $736.4 billion

NONCOMMERCIAL RESTAURANT SERVICES
- Total: $59.7 billion

MILITARY RESTAURANT SERVICES
- Total: $2.7 billion

The National Restaurant Association estimated food and beverage sales for restaurant and foodservice segments in 2017 as follows (change from 2016 in parenthesis):

EATING AND DRINKING PLACES
- Full-service restaurants: $263.0 billion (3.5%)
- Quick-service restaurants: $233.7 billion (5.3%)
- Snack and nonalcoholic beverage bars: $40.8 billion (6.0%)
• Bars and taverns: $ 19.8 billion (2.5%)
• Social caterers: $ 8.6 billion (4.0%)
• Cafeterias, grill-buffets, and buffets: $ 5.7 billion (-3.5%)
• Total: $551.6 billion (4.4%)

RETAIL AND LODGING
• Retail-host restaurants: $ 42.3 billion (3.5%)
• Hotel/accommodation restaurants: $ 36.1 billion (4.3%)
• Recreation and sports (cinemas, bowling lanes, recreation, sport centers): $ 17.7 billion (6.1%)
• Vending and non-store retailers: $ 14.3 billion (4.3%)
• Mobile caterers: $ 967 million (5.4%)
• Total: $111.4 billion (4.3%)

FOODSERVICE CONTRACTOR-MANAGED SERVICES
• Colleges and universities: $ 17.4 billion (5.1%)
• Manufacturing and industrial plants: $ 9.0 billion (4.0%)
• Primary and secondary schools: $ 7.1 billion (3.5%)
• Recreation and sports centers: $ 7.4 billion (5.8%)
• Hospitals and nursing homes: $ 6.6 billion (6.0%)
• Commercial and office buildings: $ 3.3 billion (4.2%)
• In-transit foodservice (airlines): $ 2.6 billion (3.8%)
• Total: $ 53.4 billion (4.8%)

NONCOMMERCIAL RESTAURANT SERVICES
(Businesses, educational, governmental, or institutional organizations which operate their own restaurant services)
• Hospitals: $ 18.4 billion (3.8%)
• Recreation and sports centers: $ 8.8 billion (3.6%)
• Nursing homes: $ 9.5 billion (2.3%)
• Colleges and universities: $ 8.6 billion (4.1%)
• Primary and secondary schools: $ 7.5 billion (3.0%)
• Community centers: $ 3.8 billion (5.2%)
• Transportation: $ 2.5 billion (2.1%)
• Employee restaurant services: $ 411 million (0.9%)
• Total: $ 59.5 billion (3.5%)

MILITARY RESTAURANT SERVICES
• Officer and NCO clubs (open mess): $ 1.8 billion (2.6%)
• Military exchanges: $ 899 million (3.8%)
• Total: $ 2.7 billion (3.0%)
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>
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<tr>
<td>2000</td>
<td>5.5%</td>
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<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>
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<tr>
<td>2003</td>
<td>4.5%</td>
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<td>2016</td>
<td>4.3%</td>
<td>1.7%</td>
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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%
• Pretax income: 4%
• Other (including direct operating expenses, marketing, utility services, maintenance, depreciation, administrative, interest, and corporate overhead): 24%

Expenses for limited-service restaurants are distributed as follows:
• Cost of food and beverages sold: 33%
• Salaries and wages: 30%
• Restaurant occupancy costs: 6%
• Pretax income: 8%
• General and administrative costs: 3%
• Other: 20%

The National Restaurant Association estimates annual food and beverage purchases by restaurants (including bars and taverns) at $152.2 billion. Managed foodservice spending is estimated at $17.8 billion.

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)
Figure 2.1. Restaurant Performance Index. (Source: National Restaurant Association)
3.1 Restaurant Counts

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. 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
- 2016: 620,807

The fall 2016 ReCount reported restaurants by ownership as follows (change from fall 2015 in parenthesis):

- Independent: 323,456 (-4%)
- Chains: 297,351 (1%)

“The total number of U.S. restaurants decreased by 2% from a year ago to 620,807 units. Independent restaurant units decreased by 4% and density declined from 1,132 units per million a decade ago to 1,002 units per million in fall 2016. On the flip side, chain restaurant unit counts grew by 1% in the fall 2016 increasing to 297,351 units. Density of chain restaurants grew from 860 units per million in fall 2007 to 922 in fall 2016.”

The NPD Group, 2/21/17
The restaurant count peaked at 637,548 in spring 2014, then declined about 1% in 2015 and 2016.

The distribution of restaurants by type of service was as follows:

- Quick-service and fast-casual: 53%
- Full-service (including casual-dining, midscale/family-dining, and fine-dining): 47%

### 3.2 Chain Restaurants

According to the 2016 Directory of Chain Restaurant Operators, published by Chain Store Guide (www.chainstoreguide.com), there are 429,638 chain restaurants in the United States. Restaurant counts are as follows:

#### Type of Foodservice*

- Quick-service: 338,536
- Casual-dining: 36,948
- Fast-casual: 26,519
- Family-dining: 14,534
- In-store restaurant: 10,600
- Fine-dining: 2,329
- Cafeteria: 172

#### Type of Menu*

- Hamburger: 94,384
- Sandwiches/Deli: 69,852
- Pizza: 63,320
- Snacks: 41,992
- Chicken: 38,162
- American: 37,942
- Coffee: 26,649
- Taco: 12,055
- Mexican: 8,235
- Italian: 4,941
- Seafood: 4,413
- Steak: 3,869
- Southwest/Tex-Mex: 2,865
- Chinese: 2,524
- Health Foods: 2,445
- Bar-B-Q: 2,088
- Asian: 1,622
- Bagels: 1,428
- Hot Dogs: 1,291
- Greek/Mediterranean: 1,076
- Japanese: 600
<table>
<thead>
<tr>
<th>Cuisine Type</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steak/Seafood</td>
<td>590</td>
</tr>
<tr>
<td>French/Continental</td>
<td>307</td>
</tr>
<tr>
<td>Californian</td>
<td>284</td>
</tr>
<tr>
<td>Cajun/Creole</td>
<td>193</td>
</tr>
<tr>
<td>Caribbean</td>
<td>179</td>
</tr>
<tr>
<td>Southern</td>
<td>118</td>
</tr>
<tr>
<td>Latin American/Cuban</td>
<td>99</td>
</tr>
<tr>
<td>Middle Eastern</td>
<td>66</td>
</tr>
<tr>
<td>Spanish</td>
<td>66</td>
</tr>
<tr>
<td>Eastern European</td>
<td>61</td>
</tr>
<tr>
<td>Indian</td>
<td>59</td>
</tr>
<tr>
<td>Thai</td>
<td>19</td>
</tr>
<tr>
<td>German</td>
<td>7</td>
</tr>
</tbody>
</table>

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

Chain Store Guide includes all restaurant groups with two or more locations in the count of chain restaurants. The NPD Group classifies some small local restaurant groups as independents. This difference, in part, accounts for the differing counts in sections 3.1 and 3.2.

### 3.3 Market Resources

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

The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700. [www.npd.com]
4.1 Overview
According to the International Franchise Association (www.franchise.org), there were a total of 744,437 franchise locations in the United States in 2017; employment was 7.9 million, with sales of $426 billion.

Among franchise segments, the restaurant industry is the largest. There were 221,970 restaurant franchise locations in the United States in 2017; employment was 4.6 million, with sales of $305 billion.

4.2 Franchise Restaurant Census
Franchise restaurant counts have been as follows (change from previous year in parenthesis):

Quick Service and Fast-Casual Restaurants
- 2013: 178,133 (1.2%)
- 2014: 180,717 (1.5%)
- 2015: 183,332 (1.4%)
- 2016: 186,977 (2.0%)
- 2017: 190,494 (1.9%)

Full-Service Restaurants
- 2013: 29,524 (1.4%)
- 2014: 29,829 (1.0%)
- 2015: 30,296 (1.6%)
- 2016: 30,898 (2.0%)
- 2017: 31,476 (1.9%)

4.3 Market Assessment
Franchise restaurant sales have been as follows (change from previous year in parenthesis):

Quick-Service and Fast-Casual Restaurants
- 2013: $185.13 (3.1%)
- 2014: $195.85 (5.8%)
- 2015: $207.87 (6.1%)
• 2016: $222.60 (7.1%)
• 2017: $237.60 (6.7%)

**Full Service Restaurants**

• 2013: $52.24 (2.0%)
• 2014: $55.43 (6.1%)
• 2015: $58.93 (6.3%)
• 2016: $63.20 (7.3%)
• 2017: $67.50 (6.8%)

### 4.4 Employment

Franchise restaurant employment has been as follows (change from previous year in parenthesis):

**Quick-Service and Fast-Casual Restaurants**

• 2013: 3,135,711 (6.1%)
• 2014: 3,232,917 (3.1%)
• 2015: 3,332,861 (3.1%)
• 2016: 3,471,999 (4.2%)
• 2017: 3,609,503 (4.0%)

**Full-Service Restaurants**

• 2013: 895,391 (3.6%)
• 2014: 915,703 (2.3%)
• 2015: 946,317 (3.3%)
• 2016: 985,849 (4.2%)
• 2017: 1,024,779 (3.9%)

### 4.5 Market Resources

International Franchise Association, 1900 K Street, NW, Suite 700, Washington, DC 20006. (202) 628-8000. (www.franchise.org)

5

RESTAURANT VISITS

5.1 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>
<tr>
<td>2016</td>
<td>62 billion</td>
<td>188</td>
</tr>
</tbody>
</table>

“Though U.S. foodservice traffic isn’t growing there were still close to 62 billion visits made to restaurants and other foodservice outlets last year.”

The NPD Group, 2/8/17

5.2 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, increasing about 1% per year, while off-premise occasions are declining at a 1% rate.
“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

5.3 Quick-Service and Full-Service Restaurant Visits

Quick-service restaurants (QSRs), which represent 80% of total commercial foodservice visits, realized no traffic growth in 2016. Visits to full service restaurants, which combined represent 20% of total industry traffic, declined.

“The term growing your business in a ‘one percent world’ has become a popular mantra for the restaurant industry after six consecutive years of annual traffic gains of just one percent. However, over the past six months restaurant industry traffic growth has come to a standstill and quick service restaurants, which have been the traffic growth drivers, are now experiencing a slowdown in visits.”

Bonnie Riggs, Analyst
The NPD Group, 12/6/16
5.4 Market Resources
The NPD Group, 900 West Shore Road, Port Washington, NY 11050. (516) 625-0700. (www.npd.com)

The NPD Group (www.npd.com) monitors the 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. (www.npd.com/wps/portal/npd/us/industry-expertise/foodservice/)
STATE-BY-STATE ANALYSIS

6.1 Restaurant Sales By State

The National Restaurant Association (www.restaurant.org) estimates restaurant sales in 2017 for each state as follows (change from 2016 in parenthesis):

- Alabama: $ 8.09 billion (4.5%)
- Alaska: $ 1.62 billion (4.3%)
- Arizona: $12.01 billion (5.7%)
- Arkansas: $ 4.42 billion (3.2%)
- California: $82.24 billion (5.2%)
- Colorado: $12.11 billion (5.1%)
- Connecticut: $ 7.54 billion (4.0%)
- Delaware: $ 2.03 billion (4.5%)
- District of Columbia: $ 3.75 billion (5.1%)
- Florida: $41.68 billion (6.2%)
- Georgia: $19.63 billion (5.4%)
- Hawaii: $ 4.63 billion (4.1%)
- Idaho: $ 2.28 billion (5.2%)
- Illinois: $25.20 billion (3.7%)
- Indiana: $11.60 billion (4.2%)
- Iowa: $ 4.36 billion (3.6%)
- Kansas: $ 4.79 billion (3.9%)
- Kentucky: $ 7.86 billion (3.9%)
- Louisiana: $ 8.91 billion (3.1%)
- Maine: $ 2.28 billion (3.2%)
- Maryland: $12.08 billion (3.8%)
- Massachusetts: $17.03 billion (4.1%)
- Michigan: $15.89 billion (4.1%)
- Minnesota: $ 9.73 billion (3.4%)
- Mississippi: $ 4.54 billion (3.9%)
- Missouri: $10.48 billion (3.4%)
- Montana: $ 1.83 billion (4.6%)
- Nebraska: $ 2.95 billion (3.9%)
- Nevada: $ 7.21 billion (5.8%)
- New Hampshire: $ 2.69 billion (4.3%)
- New Jersey: $16.30 billion (3.8%)
- New Mexico: $ 3.39 billion (3.0%)
6.2 Restaurant Locations By State

According to the 2017 Restaurant Industry Outlook, by the National Restaurant Association, the number of restaurants by state are as follows:

- Alabama: 7,845
- Alaska: 1,383
- Arizona: 9,314
- Arkansas: 4,954
- California: 69,908
- Colorado: 11,247
- Connecticut: 7,877
- Delaware: 1,889
- District of Columbia: 2,233
- Florida: 39,143
- Georgia: 17,900
- Hawaii: 3,370
- Idaho: 3,103
- Illinois: 27,189
- Indiana: 11,620
- Iowa: 6,129
- Kansas: 5,184
- Kentucky: 7,510
- Louisiana: 8,371
- Maine: 3,112
6.3 Foodservice Employment By State

According to the 2017 Restaurant Industry Outlook, roughly 14.7 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>185,300</td>
<td>1.4%</td>
</tr>
<tr>
<td>Alaska</td>
<td>31,700</td>
<td>1.5%</td>
</tr>
<tr>
<td>Arizona</td>
<td>290,500</td>
<td>2.2%</td>
</tr>
<tr>
<td>Arkansas</td>
<td>117,800</td>
<td>1.4%</td>
</tr>
<tr>
<td>State</td>
<td>Population</td>
<td>Percentage</td>
</tr>
<tr>
<td>------------------------</td>
<td>------------</td>
<td>------------</td>
</tr>
<tr>
<td>California</td>
<td>1,718,000</td>
<td>1.0%</td>
</tr>
<tr>
<td>Colorado</td>
<td>280,300</td>
<td>1.5%</td>
</tr>
<tr>
<td>Connecticut</td>
<td>154,100</td>
<td>0.6%</td>
</tr>
<tr>
<td>Delaware</td>
<td>49,200</td>
<td>1.4%</td>
</tr>
<tr>
<td>District of Columbia</td>
<td>63,400</td>
<td>0.7%</td>
</tr>
<tr>
<td>Florida</td>
<td>1,024,900</td>
<td>2.0%</td>
</tr>
<tr>
<td>Georgia</td>
<td>446,600</td>
<td>1.9%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>93,500</td>
<td>0.7%</td>
</tr>
<tr>
<td>Idaho</td>
<td>68,200</td>
<td>1.2%</td>
</tr>
<tr>
<td>Illinois</td>
<td>561,200</td>
<td>0.7%</td>
</tr>
<tr>
<td>Indiana</td>
<td>319,000</td>
<td>0.9%</td>
</tr>
<tr>
<td>Iowa</td>
<td>153,700</td>
<td>0.8%</td>
</tr>
<tr>
<td>Kansas</td>
<td>134,700</td>
<td>0.9%</td>
</tr>
<tr>
<td>Kentucky</td>
<td>196,900</td>
<td>0.8%</td>
</tr>
<tr>
<td>Louisiana</td>
<td>207,700</td>
<td>0.8%</td>
</tr>
<tr>
<td>Maine</td>
<td>62,700</td>
<td>0.8%</td>
</tr>
<tr>
<td>Maryland</td>
<td>250,200</td>
<td>0.7%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>339,000</td>
<td>0.6%</td>
</tr>
<tr>
<td>Michigan</td>
<td>435,000</td>
<td>0.9%</td>
</tr>
<tr>
<td>Minnesota</td>
<td>268,300</td>
<td>0.7%</td>
</tr>
<tr>
<td>Mississippi</td>
<td>121,400</td>
<td>0.8%</td>
</tr>
<tr>
<td>Missouri</td>
<td>302,500</td>
<td>0.7%</td>
</tr>
<tr>
<td>Montana</td>
<td>54,900</td>
<td>0.7%</td>
</tr>
<tr>
<td>Nebraska</td>
<td>93,600</td>
<td>0.7%</td>
</tr>
<tr>
<td>Nevada</td>
<td>207,200</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>330,900</td>
<td>0.5%</td>
</tr>
<tr>
<td>New Mexico</td>
<td>90,600</td>
<td>1.1%</td>
</tr>
<tr>
<td>New York</td>
<td>833,400</td>
<td>0.7%</td>
</tr>
<tr>
<td>North Carolina</td>
<td>458,400</td>
<td>1.9%</td>
</tr>
<tr>
<td>North Dakota</td>
<td>41,300</td>
<td>0.9%</td>
</tr>
<tr>
<td>Ohio</td>
<td>574,200</td>
<td>0.7%</td>
</tr>
<tr>
<td>Oklahoma</td>
<td>182,800</td>
<td>1.3%</td>
</tr>
<tr>
<td>Oregon</td>
<td>193,700</td>
<td>1.4%</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>558,900</td>
<td>0.4%</td>
</tr>
<tr>
<td>Rhode Island</td>
<td>57,600</td>
<td>0.6%</td>
</tr>
<tr>
<td>South Carolina</td>
<td>217,200</td>
<td>1.7%</td>
</tr>
<tr>
<td>South Dakota</td>
<td>47,700</td>
<td>1.1%</td>
</tr>
<tr>
<td>Tennessee</td>
<td>301,600</td>
<td>1.0%</td>
</tr>
<tr>
<td>Texas</td>
<td>1,273,000</td>
<td>2.0%</td>
</tr>
<tr>
<td>Utah</td>
<td>122,700</td>
<td>1.9%</td>
</tr>
<tr>
<td>Vermont</td>
<td>30,900</td>
<td>0.6%</td>
</tr>
<tr>
<td>Virginia</td>
<td>367,800</td>
<td>1.0%</td>
</tr>
<tr>
<td>Washington</td>
<td>305,400</td>
<td>1.3%</td>
</tr>
<tr>
<td>State</td>
<td>Population</td>
<td>Percentage</td>
</tr>
<tr>
<td>--------------</td>
<td>------------</td>
<td>------------</td>
</tr>
<tr>
<td>West Virginia</td>
<td>75,100</td>
<td>0.4%</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>271,600</td>
<td>0.6%</td>
</tr>
<tr>
<td>Wyoming</td>
<td>28,400</td>
<td>0.6%</td>
</tr>
</tbody>
</table>
7

REGIONAL TRENDS

7.1 Overview

The National Restaurant Association (www.restaurant.org) conducts the monthly Restaurant Industry Tracking Survey asking restaurateurs to compare current same-store sales and customer traffic with 12 months prior. The survey also asks about sales expectations for the next six months.

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

- New England Region: CT, ME, MA, NH, RI, VT
- Middle Atlantic Region: NJ, NY, PA
- South Atlantic Region: DE, DC, FL, GA, MD, NC, SC, VA, WV
- 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 March 2017.

7.2 Restaurant Sales

Same-store sales compared with 12 months 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>33%</td>
<td>50%</td>
<td>18%</td>
</tr>
<tr>
<td>New England Region</td>
<td>20%</td>
<td>20%</td>
<td>60%</td>
</tr>
<tr>
<td>Middle Atlantic Region</td>
<td>71%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>South Atlantic Region</td>
<td>14%</td>
<td>43%</td>
<td>43%</td>
</tr>
<tr>
<td>East North Central Region</td>
<td>28%</td>
<td>50%</td>
<td>22%</td>
</tr>
<tr>
<td>East South Central Region</td>
<td>83%</td>
<td>0%</td>
<td>17%</td>
</tr>
<tr>
<td>West North Central Region</td>
<td>38%</td>
<td>54%</td>
<td>8%</td>
</tr>
<tr>
<td>West South Central Region</td>
<td>22%</td>
<td>78%</td>
<td>0%</td>
</tr>
<tr>
<td>Mountain Region</td>
<td>13%</td>
<td>75%</td>
<td>13%</td>
</tr>
<tr>
<td>Pacific Region</td>
<td>33%</td>
<td>48%</td>
<td>19%</td>
</tr>
<tr>
<td>California</td>
<td>30%</td>
<td>46%</td>
<td>15%</td>
</tr>
<tr>
<td>Michigan</td>
<td>40%</td>
<td>40%</td>
<td>20%</td>
</tr>
</tbody>
</table>
7.3 Restaurant Customer Traffic
Customer traffic compared with one year prior was assessed as follows:

- **United States:** 26% Higher, 54% Lower, 20% Same
- **New England Region:** 20% Higher, 20% Lower, 60% Same
- **Middle Atlantic Region:** 43% Higher, 29% Lower, 29% Same
- **South Atlantic Region:** 29% Higher, 14% Lower, 57% Same
- **East North Central Region:** 17% Higher, 61% Lower, 22% Same
- **East South Central Region:** 67% Higher, 0% Lower, 33% Same
- **West North Central Region:** 31% Higher, 69% Lower, 0% Same
- **West South Central Region:** 11% Higher, 89% Lower, 0% Same
- **Mountain Region:** 0% Higher, 75% Lower, 25% Same
- **Pacific Region:** 33% Higher, 52% Lower, 14% Same
- **California:** 31% Higher, 54% Lower, 15% Same
- **Michigan:** 20% Higher, 40% Lower, 40% Same
- **Washington:** 50% Higher, 36% Lower, 14% Same
- **Wisconsin:** 14% Higher, 57% Lower, 29% Same

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

- **United States:** 34% Higher, 10% Lower, 56% Same
- **New England Region:** 40% Higher, 0% Lower, 60% Same
- **Middle Atlantic Region:** 29% Higher, 14% Lower, 57% Same
- **South Atlantic Region:** 43% Higher, 0% Lower, 57% Same
- **East North Central Region:** 33% Higher, 6% Lower, 61% Same
- **East South Central Region:** 50% Higher, 0% Lower, 50% Same
- **West North Central Region:** 15% Higher, 15% Lower, 69% Same
- **West South Central Region:** 0% Higher, 22% Lower, 78% Same
- **Mountain Region:** 13% Higher, 38% Lower, 50% Same
- **Pacific Region:** 57% Higher, 5% Lower, 38% Same
- **California:** 54% Higher, 0% Lower, 46% Same
- **Michigan:** 20% Higher, 0% Lower, 80% Same
- **Washington:** 36% Higher, 21% Lower, 43% Same
- **Wisconsin:** 43% Higher, 0% Lower, 57% Same
7.5 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)
8.1 Overview

8.2 Dining Out
On average, U.S. adults dine out for lunch or dinner 4.5 times per week. The most frequent diners are in the following cities:
- Los Angeles, CA: 5.2 times per week
- Austin, TX: 5.1 times per week
- Miami, FL: 5.1 times per week
- Honolulu, HI: 4.9 times per week
- New York, NY: 4.9 times per week
- San Antonio, TX: 4.9 times per week

Adults in the following cities have the lowest dining-out frequency:
- Boston, MA: 3.8 times per week
- Minneapolis, MN: 3.9 times per week
- Philadelphia, PA: 3.9 times per week
- Portland, OR: 3.9 times per week

The average national spend per person for dinner out is $36.30. Diners in the following cities report the highest average spending for dinner:
- New York, NY: $48.44
- Boston, MA: $42.83
- San Francisco, CA: $40.94
- Miami, FL: $40.58
- Los Angeles, CA: $38.21

Diners in the following cities report the lowest average spending for dinner:
- Detroit, MI: $28.77
- Minneapolis, MN: $29.67
- Atlanta, GA: $30.46
Seventy-nine percent (79%) of diners consider themselves foodies. Eighty-five percent (85%) have planned a getaway around dining at a certain restaurant.

Farm-to-table dining is important in selecting where to dine among 73% of adults. This preference is highest in Portland, Oregon (79%) and lowest in Charlotte (68%). In selecting cocktails, 63% say fresh juice ingredients are important.

### 8.3 Trendy Foods And Cuisine

When asked about food trends, adults report interest in the following menu items:

- Avocado toast: 33%
- Pork belly: 31%
- Ramen: 31%
- Sriracha: 31%

Honolulu diners are the biggest fans of ramen (53% say they “love it”) while those in Los Angeles prefer avocado toast (41%). Orlando diners prefer quinoa (34% “love it” vs. 28% nationally) and 25% of respondents in New York City say they “love” cauliflower rice.

When asked what dish they would most like to see make a comeback, responses were as follows:

- Beef Wellington: 44%
- Bananas Foster: 40%
- Baked Alaska: 26%
- Lobster Thermidor: 26%
- Waldorf salad: 26%
- Cherries jubilee: 23%

Survey participants reported their favorite cuisine as follows:

- Italian: 22%
- American: 16%
- Seafood: 11%
- Mexican: 9%
- French: 7%
- Japanese: 7%

Cuisine preference varies significantly by city. Diners in Charlotte, Denver, Houston, Minneapolis, Nashville, San Diego, and Seattle all favor American cuisine. Italian and American cuisine are tied as favorites in Atlanta, Austin, and Chicago. New Orleans diners are the country’s biggest seafood lovers (20%), and diners in
Dallas-Fort Worth are the biggest fans of Mexican food (22%), with Phoenix/Scottsdale and San Antonio close behind at 18% each.

### 8.4 Dining Preferences

When asked what irritates them most about dining out, survey participants responded as follows (percentage of respondents):

- Service: 28%
- Noise: 25%
- Crowds: 13%
- Prices: 13%
- Food: 8%
- Parking: 8%
- Traffic: 3%

Diners in Austin take the biggest issue with service (41%) while Portland, Oregon, diners cite noise (33%) as their chief complaint. Noise complaints also outweigh complaints about service in New York City (32%), Boston (30%), and San Francisco (26%).

When asked their top pet peeve or dining deal-breaker that would stop them from dining at a particular restaurant, survey participants responded as follows (percentage of respondents):

- Cash-only policy: 38%
- Communal tables: 33%
- No-substitution policy: 33%
- reservation-only policy: 20%
- no-reservation policy: 19%
- No photos allowed: 13%
- None of the above: 25%

Diners in Charlotte are the most annoyed by a cash-only policy (50%), and Houston diners detest no-substitutions (48%).

When asked about fellow diners using out their smartphones mid-meal, opinions were as follows:

- Okay in moderation: 54%
- Completely unacceptable, unless it’s an emergency: 40%
- Perfectly acceptable: 4%
- No opinion: 2%

Honolulu is the most accepting of mobile phone usage, with 67% of diners agreeing it’s “okay in moderation” and 7% saying it’s “perfectly acceptable.” Diners in Portland, Oregon, dislike phone usage the most, with 51% of respondents saying the practice is “completely unacceptable, unless it’s an emergency.”
Sixty-six percent (66%) of diners report paying their restaurant bill with a mobile payment app or say they would do so; 34% say they would not do so. These figures were 59% and 41%, respectively, in the prior year.

When asked about apps like Resy that let diners pay for a hard-to-get table, 71% said they would never pay for a reservation.

8.5 Social Media Posts

Sixty percent (60%) of avid diners say they browse photos of food on social media. Among them, 75% say they have picked a place to eat based on the photos alone.

Forty-four percent (44%) of diners nationally say that they take photos of meals when dining out to share on social media. Those who participate in this activity are most prevalent in Charleston, San Diego (both 53%), Austin, Miami and Orlando (all 51%). Nineteen percent (19%) have picked a place to eat just so they can take their own food photos.

Food photography is so popular that 60% admit to stopping dining companions from eating so they can take food photos, 50% say they have taken photos of every dish at the table, and 5% have even asked another table if they can photograph their dish.

“Not only are food-obsessed American diners scrolling through their feeds to check out the latest food shots, but they have no qualms about snapping their own photos while at restaurants. It doesn’t come without consequence though as 8% of those who take food photos to share on social media say they have dropped their phone on their meal trying to get the perfect shot.”

Zagat, 9/13/16

Among diners who post pictures to social media, 41% do so right at the table, 14% do it on the way home, 34% post later that day, and 10% save them for #tbt or later. Foodie photographers in Detroit and San Antonio (both 58%) are most likely to post photos at the table.
8.6 Tipping

U.S. adults leave an average gratuity of 18.9% on their restaurant bill. The following cities have the most generous tippers:

• Boston, MA: 20.0%
• Philadelphia, PA: 19.9%
• Chicago, IL: 19.6%
• Denver, CO: 19.4%
• Washington, DC: 19.3%

Diners in the following cities report the lowest average tip:

• San Antonio, TX: 17.1%
• Orlando, FL: 18.1%
• Minneapolis, MN: 18.2%
• Nashville, TN: 18.2%
• Honolulu, HI: 18.5%
• Los Angeles, CA: 18.5%

8.7 Market Resources

Zagat, 76 9th Avenue, 4th Floor, New York, NY 10011. (www.zagat.com)

Zagat Blog: (https://zagat.googleblog.com/)
HOW AMERICANS EAT

9.1 The U.S. Food Dollar

According to a 2016 report by the U.S. Department of Agriculture, Economic Research Service (www.ers.usda.gov), households allocate food spending as follows:

- Quick-service restaurants: 27%
- Full-service restaurants: 23%
- Complex ingredients: 18%
- Ready-to-eat food: 18%
- Ready-to-cook food: 8%
- Basic ingredients: 5%

“When Americans buy food, they devote most of their budget to convenience. Half of the average household’s food budget is devoted to the most convenient food of all – restaurant meals. Another 26% is spent on ready-to-eat or ready-to-cook foods. Only 5% of the food dollar is spent on basic ingredients.”

Demo Memo, 9/10/16

9.2 Distribution Of Daily Food Consumption

According to BMJ Open (http://bmjopen.bmj.com), daily food consumption in the U.S. is distributed as follows:

- Unprocessed or minimally processed food: 32.6%
  - Meat and poultry: 7.9%
  - Fruit: 5.2%
  - Milk and plain yogurt: 5.1%
  - Grains: 2.8%
<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potatoes and roots:</td>
<td>1.6%</td>
</tr>
<tr>
<td>Eggs</td>
<td>1.4%</td>
</tr>
<tr>
<td>Pasta</td>
<td>1.4%</td>
</tr>
<tr>
<td>Fish and seafood:</td>
<td>0.8%</td>
</tr>
<tr>
<td>Legumes</td>
<td>0.8%</td>
</tr>
<tr>
<td>Vegetables</td>
<td>0.7%</td>
</tr>
<tr>
<td>Other</td>
<td>4.7%</td>
</tr>
<tr>
<td><strong>Processed foods:</strong></td>
<td></td>
</tr>
<tr>
<td>Cheese</td>
<td>3.7%</td>
</tr>
<tr>
<td>Processed meat and fish:</td>
<td>1.2%</td>
</tr>
<tr>
<td>Pickles</td>
<td>0.7%</td>
</tr>
<tr>
<td>Other</td>
<td>3.8%</td>
</tr>
<tr>
<td><strong>Ultra-processed foods:</strong></td>
<td></td>
</tr>
<tr>
<td>Breads and cereal:</td>
<td>12.2%</td>
</tr>
<tr>
<td>Cake, ice cream, and other sweets:</td>
<td>12.3%</td>
</tr>
<tr>
<td>Soda and fruit drinks:</td>
<td>7.0%</td>
</tr>
<tr>
<td>Salty snacks</td>
<td>4.6%</td>
</tr>
<tr>
<td>Frozen and packaged meals:</td>
<td>4.0%</td>
</tr>
<tr>
<td>Pizza</td>
<td>3.5%</td>
</tr>
<tr>
<td>Sauces</td>
<td>2.4%</td>
</tr>
<tr>
<td>Ultra-processed meat/fish:</td>
<td>2.4%</td>
</tr>
<tr>
<td>Milk-based drinks:</td>
<td>1.8%</td>
</tr>
<tr>
<td>Fries</td>
<td>1.7%</td>
</tr>
<tr>
<td>Sandwiches</td>
<td>1.4%</td>
</tr>
<tr>
<td>Soup</td>
<td>0.8%</td>
</tr>
<tr>
<td>Other</td>
<td>3.8%</td>
</tr>
</tbody>
</table>

“The standard American diet isn’t exactly a sterling example of healthy eating, and a new study in the journal *BMJ Open* suggests it may be worse than previously thought. When scientists surveyed a representative sample of more than 9,000 Americans, they found that nearly 60% of their calories came from ultra-processed foods like soft drinks, snacks, cakes, pizza, and frozen meals.”

*Time*, 3/21/16
9.3 Meal Sources

Annually, the USDA Economic Research Service conducts the National Household Food Acquisition and Purchase Survey (FoodAPS). The survey categorizes food acquisition events into nine venues, examining how often households acquire food from each venue. The following is a summary of the 2016 report:

Large grocery stores
- Eighty-seven percent (87%) of households source food from large grocery stores during an average week. Those who visit large grocery stores make 2.8 trips to the store, spending an average of $45 at each visit (including nonfood items).

Restaurants
- Eighty-five percent (85%) of households source food from restaurants during an average week. Those who order food from restaurants do so 5.4 times a week (twice as often as going to a large grocery store) and spend $25 per visit (including tips).

Convenience Stores
- Forty-two percent (42%) of households source food from convenience stores, dollar stores, pharmacies, etc. during an average week. Those who do average 2.2 visits a week and spend $5 per visit.

Family and Friends
- Thirty-seven percent (37%) of households source food from family or friends during an average week. These people do so an average of 2.7 times a week. Almost all of this food (95%) is free.

Work
- Twenty-two percent (22%) of households source food at work during an average week, and those who do average 3.5 times a week. Seventy percent (70%) of this food is free.

Small Specialty Food Stores
- Eighteen percent (18%) of households source food from small and specialty food stores during an average week, visiting 1.4 times.

Schools
- Fourteen percent (14%) of households source food at school or day care during an average week, doing so an average of 6.3 times a week.

Own Production
- Six percent (6%) of households source food from hunting, fishing, or gardening during an average week. These people do so 1.9 times a week.
Food Banks/Meals on Wheels
• One percent (1%) of households source food from food banks or Meals on Wheels during an average week. Those who obtain food from this source do so 1.7 times a week.

9.4 Compliance With Dietary Guidelines
Dietary Guidelines 2015-2020, by the Office of Disease Prevention and Health Promotion (www.health.gov), assessed the dietary intakes for the U.S. population ages one and older. The following are the percentages of people who are below, at, or above the recommended level for nine food groups and dietary components:

<table>
<thead>
<tr>
<th></th>
<th>Below Goal</th>
<th>Above Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vegetables:</td>
<td>87%</td>
<td>13%</td>
</tr>
<tr>
<td>Fruit:</td>
<td>75%</td>
<td>25%</td>
</tr>
<tr>
<td>Total Grains:</td>
<td>44%</td>
<td>56%</td>
</tr>
<tr>
<td>Dairy:</td>
<td>86%</td>
<td>14%</td>
</tr>
<tr>
<td>Protein Foods:</td>
<td>42%</td>
<td>58%</td>
</tr>
<tr>
<td>Oils:</td>
<td>72%</td>
<td>28%</td>
</tr>
<tr>
<td>Added sugars:</td>
<td>30%</td>
<td>70%</td>
</tr>
<tr>
<td>Saturated fats:</td>
<td>71%</td>
<td>29%</td>
</tr>
<tr>
<td>Sodium:</td>
<td>89%</td>
<td>11%</td>
</tr>
</tbody>
</table>

“The typical eating patterns currently ... in the United States do not align with the Dietary Guidelines. About three-fourths of the population has an eating pattern that is low in vegetables, fruits, dairy, and oils. More than half of the population is meeting or exceeding total grain and total protein foods recommendations, but are not meeting the recommendations for subgroups within each of these food groups. Most Americans exceed the recommendations for added sugars, saturated fats, and sodium. In addition, the eating patterns of many are too high in calories.”

Dietary Guidelines 2015-2020
9.5 Trends

According to the USDA Economic Research Service, 58% of people ages 15 and older typically eat prepared food from a deli, carry-out, quick-service restaurant, or delivery service at least once a week. By age, the following percentages do so:

- 15-to-17: 52.1%
- 18-to-24: 67.4%
- 25-to-64: 60.9%
- 65 and older: 42.3%

The USDA Economic Research Service reports fruit and vegetable consumption fell by 27 pounds per capita during the past decade, from 299 pounds per person to 272 pounds per person. Three items account for most of the decline: orange juice, potatoes, and head lettuce. Children (ages 2-to-19) and men (ages 20 or older) eat fewer vegetables while women are eating more vegetables (except for potatoes and tomatoes). Vegetable consumption (except potatoes) has also increased among the college educated.

Since 1985, The NPD Group (www.npd.com) has published Annual Report On Eating Patterns In America. The following are findings of the 2016 edition:

- Forty-eight percent (48%) of dinner meals purchased from a restaurant are eaten at home as take-out.
- Making sandwiches at home is on the rise. Sandwiches are part of over 30% of home-prepared lunches. Ordering sandwiches out at restaurants is declining. Sandwiches are present at 11 fewer away-from-home occasions since 2008.
- Seventy-four percent (74%) of all burgers consumed are purchased at restaurants.
- Ninety-five percent (95%) of all eating occasions of fruit occur at home; just 5% occur away from home.
- Nine percent (9%) of foodservice dinners are purchased from a retail store (e.g., supermarket).
- Five percent (5%) of restaurant dinners are ordered via the Internet or a mobile app.

9.6 Market Resources

(www.npd.com/latest-reports/eating-patterns-america-consumer-consumption-behavior/)

(https://health.gov/dietaryguidelines/2015/guidelines/)

DINING OUT - DEMOGRAPHICS

10.1 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.

10.2 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>Local QSR</th>
<th>Local Casual Chain</th>
<th>Local Fine Dining Chain</th>
<th>Casual 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>

<table>
<thead>
<tr>
<th>Age</th>
<th>Local QSR</th>
<th>Local Casual Chain</th>
<th>Local Fine Dining Chain</th>
<th>Casual Chain</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-to-35:</td>
<td>71%</td>
<td>52%</td>
<td>57%</td>
<td>21%</td>
</tr>
<tr>
<td>36-to-47:</td>
<td>68%</td>
<td>51%</td>
<td>52%</td>
<td>20%</td>
</tr>
<tr>
<td>48-to-66:</td>
<td>61%</td>
<td>55%</td>
<td>51%</td>
<td>14%</td>
</tr>
<tr>
<td>67 and older:</td>
<td>51%</td>
<td>61%</td>
<td>45%</td>
<td>19%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Family</th>
<th>Local QSR</th>
<th>Local Casual Chain</th>
<th>Local Fine Dining Chain</th>
<th>Casual Chain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children in HH:</td>
<td>73%</td>
<td>50%</td>
<td>56%</td>
<td>16%</td>
</tr>
<tr>
<td>No children in HH:</td>
<td>61%</td>
<td>55%</td>
<td>51%</td>
<td>18%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Community</th>
<th>Local QSR</th>
<th>Local Casual Chain</th>
<th>Local Fine Dining Chain</th>
<th>Casual Chain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urban:</td>
<td>64%</td>
<td>50%</td>
<td>47%</td>
<td>23%</td>
</tr>
<tr>
<td>Surburban:</td>
<td>63%</td>
<td>56%</td>
<td>57%</td>
<td>19%</td>
</tr>
<tr>
<td>Rural:</td>
<td>67%</td>
<td>54%</td>
<td>47%</td>
<td>10%</td>
</tr>
</tbody>
</table>

### 10.3 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%

### 10.4 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 was 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 was 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>

10.5 Market Resources
11.1 Overview

Gallup Polls (www.gallup.com) periodically asks adults how frequently they dine out. The most recent dining-out poll was conducted in December 2016. The findings were compared with similar polls in 2003, 2005, and 2008 (also conducted in December).

The following is a summary of the December 2016 poll:

- Sixty-one percent (61%) of adults ate dinner out at least once in last seven days.
- Sixteen percent (16%) were frequent diners, eating dinner out three or more times.
- Eating at a restaurant strongly related to age and income.

“Americans’ propensity to eat at restaurants is little changed from a decade ago. Sixty-one percent of U.S. adults recently reported they ate dinner at a restaurant at least once in the past week, similar to the 60% found in 2008. The rate was a bit higher before the 2007-2009 recession, including 66% in 2003. Fairly consistent with past years, 45% of all Americans reported going out to eat one or two times during the past week. A much smaller proportion, 16%, ate out three or more times. The trend suggests that frequent restaurant dining has been fairly steady, fluctuating between 15% and 18% since 2003. Meanwhile, occasional dining dipped from 49% in 2003 and 2005 to 42% in 2008. It remains slightly lower today, at 45%.”

Gallup, 1/11/17
11.2 Dining Frequency

Respondents reported the frequency of eating dinner at a restaurant in the past week as follows:

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero times:</td>
<td>34%</td>
<td>35%</td>
<td>40%</td>
<td>38%</td>
</tr>
<tr>
<td>One time:</td>
<td>29%</td>
<td>29%</td>
<td>28%</td>
<td>26%</td>
</tr>
<tr>
<td>Two times:</td>
<td>20%</td>
<td>20%</td>
<td>14%</td>
<td>19%</td>
</tr>
<tr>
<td>Three or more times:</td>
<td>17%</td>
<td>15%</td>
<td>18%</td>
<td>16%</td>
</tr>
</tbody>
</table>

11.3 Dining Out By Household Income And Age

By household income, respondents in December 2016 reported eating dinner at a restaurant in the past week:

<table>
<thead>
<tr>
<th>Income Range</th>
<th>&lt;=$30,000</th>
<th>$30k to $75k</th>
<th>&gt;$75,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero times:</td>
<td>56%</td>
<td>33%</td>
<td>28%</td>
</tr>
<tr>
<td>One time:</td>
<td>19%</td>
<td>31%</td>
<td>28%</td>
</tr>
<tr>
<td>Two times:</td>
<td>16%</td>
<td>20%</td>
<td>23%</td>
</tr>
<tr>
<td>Three or more times:</td>
<td>9%</td>
<td>15%</td>
<td>21%</td>
</tr>
<tr>
<td>At least once (total):</td>
<td>44%</td>
<td>67%</td>
<td>72%</td>
</tr>
</tbody>
</table>

“Naturally, there is a strong relationship between income and dining out. The percentage eating at a restaurant at least weekly rises from 44% among those earning less than $30,000 in annual household income to 67% among those in the middle income group and 72% among those earning $75,000 or more.”

Gallup, 1/11/17

By age, respondents in December 2016 reported eating dinner at a restaurant in the past week:

<table>
<thead>
<tr>
<th>Age Group</th>
<th>18-to-34</th>
<th>35-to-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero times:</td>
<td>28%</td>
<td>35%</td>
<td>50%</td>
</tr>
<tr>
<td>One time:</td>
<td>31%</td>
<td>26%</td>
<td>22%</td>
</tr>
<tr>
<td>Two times:</td>
<td>21%</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>Three or more times:</td>
<td>20%</td>
<td>19%</td>
<td>11%</td>
</tr>
<tr>
<td>At least once (total):</td>
<td>72%</td>
<td>65%</td>
<td>50%</td>
</tr>
</tbody>
</table>
“The frequency of dining out is also related to age. Seven in 10 young adults – those ages 18-to-34 – ate dinner out at least once in the past week, compared with 65% of those ages 35-to-54 and 50% of those ages 55 and older. In addition, roughly twice as many young adults (20%) and middle-aged adults (19%) as older adults (11%) report more frequent dining excursions.”

Gallup, 1/11/17

Based on combined Gallup polls from 2003, 2005, 2008, and 2016, adults reported eating dinner at a restaurant at least once in the past week, by age and income, as follows:

<table>
<thead>
<tr>
<th></th>
<th>&lt;$30,000</th>
<th>$30k to $75k</th>
<th>&gt;$75,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-to-34:</td>
<td>60%</td>
<td>77%</td>
<td>78%</td>
</tr>
<tr>
<td>35-to-54:</td>
<td>46%</td>
<td>65%</td>
<td>74%</td>
</tr>
<tr>
<td>55 and older:</td>
<td>38%</td>
<td>57%</td>
<td>73%</td>
</tr>
</tbody>
</table>

“The income-related drop in weekly dining is slightly less steep among middle-aged adults, falling from 74% to 46%. It is far less pronounced among young adults, dipping from 78% to 60%.”

Gallup, 1/11/17

11.4 Market Resources

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019
• 64 •
12

PUBLICLY TRADED RESTAURANT CORPORATIONS

12.1 Overview

Stocks for 56 restaurant corporations are traded on the New York Stock Exchange and NASDAQ. The combined market capitalization for these 56 companies is $308.7 billion (as of First Quarter 2017).

12.2 Restaurant Stocks and Market Capitalization

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

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Ticker</th>
<th>Market Cap</th>
</tr>
</thead>
<tbody>
<tr>
<td>McDonald's Corporation</td>
<td>MCD</td>
<td>$105.0 billion</td>
</tr>
<tr>
<td>Starbucks Corp.</td>
<td>SBUX</td>
<td>$ 83.2 billion</td>
</tr>
<tr>
<td>Yum! Brands, Inc.</td>
<td>YUM</td>
<td>$ 23.1 billion</td>
</tr>
<tr>
<td>Restaurant Brands International, Inc.</td>
<td>QSR</td>
<td>$ 12.8 billion</td>
</tr>
<tr>
<td>Chipotle Mexican Grill, Inc.</td>
<td>CMG</td>
<td>$ 12.0 billion</td>
</tr>
<tr>
<td>Darden Restaurants, Inc.</td>
<td>DRI</td>
<td>$  9.4 billion</td>
</tr>
<tr>
<td>Dominos Pizza, Inc.</td>
<td>DPZ</td>
<td>$  9.1 billion</td>
</tr>
<tr>
<td>Dunkin Brands Group, Inc.</td>
<td>DNKN</td>
<td>$  5.1 billion</td>
</tr>
<tr>
<td>Panera Bread Company</td>
<td>PNRA</td>
<td>$  4.9 billion</td>
</tr>
<tr>
<td>Cracker Barrel Old Country Store, Inc.</td>
<td>CBRL</td>
<td>$  4.0 billion</td>
</tr>
<tr>
<td>The Wendy’s Company</td>
<td>WEN</td>
<td>$  3.4 billion</td>
</tr>
<tr>
<td>Buffalo Wild Wings, Inc.</td>
<td>BWLD</td>
<td>$  2.7 billion</td>
</tr>
<tr>
<td>Brinker International, Inc.</td>
<td>EAT</td>
<td>$  2.1 billion</td>
</tr>
<tr>
<td>Jack in the Box, Inc.</td>
<td>JACK</td>
<td>$  3.0 billion</td>
</tr>
<tr>
<td>Texas Roadhouse, Inc.</td>
<td>TXRH</td>
<td>$  3.0 billion</td>
</tr>
<tr>
<td>Papa John’s International, Inc.</td>
<td>PZZA</td>
<td>$  2.9 billion</td>
</tr>
<tr>
<td>The Cheesecake Factory Incorporated</td>
<td>CAKE</td>
<td>$  2.9 billion</td>
</tr>
<tr>
<td>Dave &amp; Busters Entertainment, Inc.</td>
<td>PLAY</td>
<td>$  2.4 billion</td>
</tr>
<tr>
<td>Bloomin’ Brands, Inc.</td>
<td>BLMN</td>
<td>$  1.8 billion</td>
</tr>
<tr>
<td>Popeyes Louisiana Kitchen, Inc.</td>
<td>PLKI</td>
<td>$  1.6 billion</td>
</tr>
<tr>
<td>Bob Evans Farms, Inc.</td>
<td>BOBE</td>
<td>$  1.1 billion</td>
</tr>
<tr>
<td>Sonic Corp.</td>
<td>SONC</td>
<td>$  1.1 billion</td>
</tr>
<tr>
<td>DineEquity, Inc.</td>
<td>DIN</td>
<td>$  903 million</td>
</tr>
<tr>
<td>Denny’s Corporation</td>
<td>DENN</td>
<td>$  899 million</td>
</tr>
<tr>
<td>Shake Shack, Inc.</td>
<td>SHAK</td>
<td>$  876 million</td>
</tr>
<tr>
<td>Restaurant Name</td>
<td>Ticker</td>
<td>Market Value</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>--------</td>
<td>--------------</td>
</tr>
<tr>
<td>Biglari Holdings Inc.</td>
<td>BH</td>
<td>$874 million</td>
</tr>
<tr>
<td>BJ’s Restaurants, Inc.</td>
<td>BJRI</td>
<td>$812 million</td>
</tr>
<tr>
<td>Wingstop, Inc.</td>
<td>WING</td>
<td>$766 million</td>
</tr>
<tr>
<td>Bojangles, Inc.</td>
<td>BOJA</td>
<td>$746 million</td>
</tr>
<tr>
<td>Red Robin Gourmet Burgers, Inc.</td>
<td>RRGB</td>
<td>$621 million</td>
</tr>
<tr>
<td>Fiesta Restaurant Group, Inc.</td>
<td>FRGI</td>
<td>$550 million</td>
</tr>
<tr>
<td>Carrols Restaurant Group, Inc.</td>
<td>TAST</td>
<td>$546 million</td>
</tr>
<tr>
<td>Ruth’s Hospitality Group, Inc.</td>
<td>RUTH</td>
<td>$544 million</td>
</tr>
<tr>
<td>Chuy’s Holdings Inc.</td>
<td>CHUY</td>
<td>$475 million</td>
</tr>
<tr>
<td>El Pollo Loco Holdings, Inc.</td>
<td>LOCO</td>
<td>$468 million</td>
</tr>
<tr>
<td>Fogo de Chaô, Inc.</td>
<td>FOGO</td>
<td>$392 million</td>
</tr>
<tr>
<td>Del Frisco’s Restaurant Group, LLC</td>
<td>DFRG</td>
<td>$384 million</td>
</tr>
<tr>
<td>Zoes Kitchen</td>
<td>ZOES</td>
<td>$340 million</td>
</tr>
<tr>
<td>Potbelly Corporation</td>
<td>PBPB</td>
<td>$325 million</td>
</tr>
<tr>
<td>Habit Restaurants, Inc.</td>
<td>HABT</td>
<td>$265 million</td>
</tr>
<tr>
<td>Nathan’s Famous, Inc.</td>
<td>NATH</td>
<td>$251 million</td>
</tr>
<tr>
<td>Jamba, Inc.</td>
<td>JMBA</td>
<td>$148 million</td>
</tr>
<tr>
<td>J. Alexander’s Holdings, Inc.</td>
<td>JAX</td>
<td>$134 million</td>
</tr>
<tr>
<td>Ruby Tuesday, Inc.</td>
<td>RT</td>
<td>$115 million</td>
</tr>
<tr>
<td>Noodles &amp; Company</td>
<td>NDLS</td>
<td>$107 million</td>
</tr>
<tr>
<td>Luby’s, Inc.</td>
<td>LUB</td>
<td>$100 million</td>
</tr>
<tr>
<td>Ark Restaurants</td>
<td>ARKR</td>
<td>$87 million</td>
</tr>
<tr>
<td>Papa Murphy’s Holdings, Inc.</td>
<td>FRSH</td>
<td>$71 million</td>
</tr>
<tr>
<td>Kona Grill, Inc.</td>
<td>KONA</td>
<td>$66 million</td>
</tr>
<tr>
<td>Bravo Brio Restaurant Group, Inc.</td>
<td>BBRG</td>
<td>$65 million</td>
</tr>
<tr>
<td>Flanigan’s Enterprises Inc.</td>
<td>BDL</td>
<td>$46 million</td>
</tr>
<tr>
<td>Famous Dave’s of America, Inc.</td>
<td>DAVE</td>
<td>$39 million</td>
</tr>
<tr>
<td>Good Times Restaurants Inc.</td>
<td>GTIM</td>
<td>$38 million</td>
</tr>
<tr>
<td>Granite City Food</td>
<td>GCFB</td>
<td>$16 million</td>
</tr>
<tr>
<td>Noble Roman’s Inc.</td>
<td>NROM</td>
<td>$12 million</td>
</tr>
<tr>
<td>Ignite Restaurant Group, Inc.</td>
<td>IRG</td>
<td>$10 million</td>
</tr>
<tr>
<td>Chanticleer Holdings, Inc.</td>
<td>HOTR</td>
<td>$9 million</td>
</tr>
<tr>
<td>Star Buffet Inc.</td>
<td>STRZ</td>
<td>$5 million</td>
</tr>
</tbody>
</table>
PART II: TRENDS FOR 2017
CULINARY TRENDS

13.1 Overview
The National Restaurant Association (NRA, www.restaurant.org) surveys over 1,200 member chefs of the American Culinary Federation (ACF, 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.

“According to the survey, menu trends that will be heating up in 2017 include poke, house-made charcuterie, street food, food halls, and ramen. Trends that are cooling down include quinoa, black rice, and vegetarian, and vegan cuisines.”

2017 Culinary Forecast
National Restaurant Association, 12/8/16

2017 Culinary Forecast, based on the NRA-ACF survey, presents the following culinary trends:

13.2 Top Food Trends
Chefs of the American Culinary Federation rank the top menu trends for 2017 as follows:
1. New cuts of meat (e.g., shoulder tender, oyster steak, Vegas Strip Steak, Merlot cut)
2. Street food-inspired dishes (e.g., tempura, kabobs, dumplings, pupusas)
3. Healthful kids’ meals
4. House-made charcuterie
5. Sustainable seafood
6. Ethnic-inspired breakfast items (e.g., chorizo scrambled eggs, coconut milk pancakes)
7. House-made condiments
8. Authentic ethnic cuisine
9. Heirloom fruit and vegetables
10. African flavors
11. Ethnic spices (e.g., harissa, curry, peri peri)
12. House-made sausage
13. House-made pickles
14. Ancient grains (e.g., kamut, spelt, amaranth, lupin)
15. House-made/artisan ice cream
16. Whole grain items in kids’ meals
17. Protein-rich grains/seeds (e.g., hemp, chia, quinoa, flax)
18. Artisan cheeses
19. Savory desserts
20. Gourmet items in kids’ meals

13.3 Top Concept Trends
The top concept trends for 2017 are as follows:
1. Hyper-local sourcing (e.g., restaurant gardens, onsite beer brewing, house-made items)
2. Chef-driven fast-casual concepts
3. Natural ingredients/clean menus
4. Environmental sustainability
5. Locally sourced produce
6. Locally sourced meat and seafood
7. Food waste reduction
8. Meal kits (e.g., pre-measured/prepped raw ingredients for home preparation)
9. Simplicity/back to basics
10. Nutrition

13.4 Top Trends By Category
By food category, the following are the top trends for 2017:

Alcoholic Beverages
1. Craft/artisan spirits
2. Onsite barrel-aged drinks
3. Locally produced wine/spirits/beer
4. Regional signature cocktails
5. Culinary cocktails

Breakfast/Brunch
1. Ethnic-inspired breakfast items
2. Avocado toast
3. Traditional ethnic breakfast items
4. Overnight oats
5. Breakfast hash

Condiments and Accoutrements
1. House-made condiments
2. Ethnic spices
3. House-made pickles
4. Protein-rich grains/seeds
5. Artisan cheeses

Culinary Concepts
1. Hyper-local sourcing
2. Natural ingredients/clean menus
3. Environmental sustainability
4. Locally sourced produce
5. Locally sourced meat and seafood

Dishes
1. Street food-inspired dishes
2. House-made charcuterie
3. Vegetable carb substitutes
4. Seafood charcuterie
5. Pho

Global Flavors
1. Authentic ethnic cuisine
2. African flavors
3. Ethnic fusion cuisine
4. Middle Eastern flavors
5. Latin American flavors

Kids’ Meals
1. Healthful kids’ meals
2. Whole grain items in kids’ meals
3. Gourmet items in kids’ meals
4. Kids’ entree salads
5. Fruit/vegetable kids’ side items

Non-Alcoholic Beverages
1. House-made/artisan soft drinks
2. Gourmet lemonade
3. Locally/house roasted coffee
4. Specialty iced tea
5. Cold brew coffee
Pasta and Grains
1. Ancient grains
2. Non-wheat noodles/pasta
3. Farro
4. Black/forbidden rice
5. Hand-made pasta

Produce
1. Heirloom fruits and vegetables
2. Unusual/uncommon herbs
3. Hybrid fruits/vegetables
4. Exotic fruit
5. Dark greens

Protein
1. New cuts of meat
2. Sustainable seafood
3. House-made sausage
4. Free-range pork/poultry
5. Heritage-breed meats

Restaurant Concepts
1. Chef-driven fast-casual concepts
2. Food waste reduction
3. Meal kits
4. Pop-up/temporary restaurants
5. Food trucks

Sweets
1. House-made/artisan ice cream
2. Savory desserts
3. Donuts with non-traditional filling
4. Smoked dessert ingredients
5. Bite-size/mini-desserts

13.5 Categorizing Trends
Chefs of the American Culinary Federation categorized food trends for 2017 as follows:

Trends Heating Up
1. Poke
2. House-made charcuterie
3. Street food-inspired dishes
4. Food halls
5. Ramen
6. Breakfast burritos/tacos
7. House-made condiments
8. Lumberjack breakfast/fry-up

**Trends Cooling Down**
1. Quinoa
2. Sodium-conscious cuisine
3. Black/forbidden rice
4. Vegetarian cuisine
5. Vegan cuisine
6. Locally sourced meat and seafood
7. Ethnic condiments
8. Ethnic cheeses
9. Tapas/mezze/dim sum
10. Food trucks
11. Non-wheat noodles/pasta
12. Grass-fed beef
13. House-made/artisan ice cream
14. Food-beer pairings
15. Organic produce
16. Inexpensive/underused meats
17. Gelato

**Yesterday’s News**
1. Insects
2. Molecular gastronomy
3. Offal (e.g. heart, tripe, liver, sweetbreads)
4. Bitter melon
5. Algae
6. Sweet potato fries
7. Fun-shaped kids’ items
8. Kale salads
9. Prepaid tickets
10. Sharable cocktails

**Perennial Favorites**
1. Fish and chips
2. French toast
3. Bacon
4. Mashed/pureed potatoes
5. Barbecue
6. Comfort foods (e.g. chicken pot pie, meatloaf, roasted chicken)
7. Shellfish
8. Cannoli
9. Bread pudding
10. Zucchini

13.6 Market Resources
2017 Culinary Forecast, National Restaurant Association and American Culinary Federation, December 2016.
14

FOOD & DINING TRENDS

14.1 Overview
This chapter provides summaries of forecasts for dining trends in 2017 based on the assessments of the following analysts and media sources:
• Andrew Freeman & Co. (www.afandco.com)
• Baum + Whiteman (www.baumwhiteman.com)
• Flavor Forecast (www.flavorforecast.com)
• Nation’s Restaurant News (www.nrn.com)
• Sterling-Rice Group (www.srg.com)
• Technomic (www.technomic.com)
• The NPD Group (www.npd.com)

14.2 Andrew Freeman & Co.
Andrew Freeman & Co. forecasts the following restaurant and dining trends for 2017:
Trends Of The Year
• Modern takes on lesser-known cuisines are taking the country by storm. These include Modern Indian, Modern Korean, Modern African, and Modern Middle Eastern. The following are examples:
  - Modern Indian: Babu Ji (New York, NY), Botiwalla (Atlanta, GA)
  - Modern Korean: Hanjip (Culver City, CA), Oiji (New York, NY), Parachute (Chicago, IL)
  - Modern Middle Eastern: ILILI (New York, NY), Mamnoon (Seattle, WA)
• Restaurants are elevating the humble breakfast sandwich to new levels. Think breakfast sandwiches on dinner menus and Michelin-starred restaurants doling out egg sandwiches paired with exceptional latte art in the morning.
• Influenced by a long history of culinary tradition and the flavors of India, Japan, Malay, China, and Spain, Filipino cuisine is bold, fresh, and borderline addictive. Wildly popular in Los Angeles, Filipino fare is finally getting its moment in the spotlight across the country. Filipinos make up the second-largest Asian population in the U.S.
• There are high culinary expectations for cannabis. California, Maine, Massachusetts, and Nevada join the ranks of Colorado, Oregon, Washington, and Alaska in legalizing recreational cannabis. Offerings include marijuana edibles,
cannabis cooking, infused cocktails, and cannabis wine. Chef Chris Sayegh is already tapping this market via his Los Angeles-based company, The Herbal Chef, catering high-end meals ($300-$500 per person) to medical marijuana card holders.

Food Trends
• Grain bowls are a staple vegetarian menu item (and delicious with meat add-ons, too). Grain bowls are the perfect vessel for customizing.
• Welcome to the future where veggie burgers taste delicious and look so much like beef that they appear to actually bleed. There’s a new wave of vegetable presentations and preparations. Look for more plant-based restaurants to join the ranks of Erven (Santa Monica, CA), and entire entrée sections devoted to vegetables like Salt House (San Francisco, CA).
• There are new ways to indulge in ice cream. Examples include Soft Serve Matcha at Cha Cha Matcha (New York, NY), Thai Rolled Ice Cream at Class 502 (Houston, TX), and Chef Crafted Flavors at Salt & Straw (Portland, OR).
• Thanks to Millennials, the desire for discovery and experiences is not going away. People are craving more and more authentic experiences leading to a rise in lesser known ethnic cuisines, especially from Asia. Expect to see an increase in Filipino, Taiwanese, Laotian, Malaysian, Indonesian cuisine, and more.
• Tartare is making a menu comeback. But not only the classic steak tartare. Combining traditional technique with modern flavor profiles, restaurants are pushing the fold on the classic French appetizer.
• The vegan lifestyle is becoming more mainstream. Advances in food technology and vegan acceptance have paved the way for a bevy of animal-free products, all engineered to look and taste like the real thing. Restaurants serving popular cheese alternatives include Riverdale Vegan Cheese Shop (New York, NY), Sqirl (Los Angeles, CA), and Wayward Sons (Dallas, TX).
• Fermentation brings out other-worldly flavors in vegetables and is supposedly beneficial to your gut microbe.
• Typically reserved for the most luxurious of occasions, caviar has started to appear in unexpected places. Today’s modern caviar service is classic with a twist like fun plating in kitschy clam shells and accompaniments like potato chips. Also on the menu are plenty of traditional touches like crème fraîche, chives, and mother of pearl spoons.

Beverage Trends
• Natural wine is minimally processed, additive-free, and generally produced without adding or removing anything. Natural wine can be darker than usual, a little fizzy, cloudy or with good-sized clumps of yeast floating about.
• Sour brews are taking the beer scene by storm. Most brewers have traditionally tried, with great success, to keep souring agents (a few certain kinds of microbes) out of their beer. But today sour-on-purpose beer is increasingly popular. Restaurants and bars are welcoming entire menu sections devoted to the super sour brew.
• Craft sake breweries and bars are opening all over the United States, educating customers on the intricacies of the spirit.
• A staple thirst-quencher amongst farmers for hundreds of years, the tart and tangy Switchel is back. A slightly vinegary drink typically seasoned with ginger and sweetened with molasses, honey or maple syrup, Switchel is gaining popularity as a healthy sports drink alternative.
• Rosé is no longer just a spring/summer offering, it is being featured throughout the year as a sound wine for food pairing,. Rosé continued strong double digit category growth in 2016. Both retail and restaurant lists have expanded their rosé offerings, and this is a trend that will continue.
• Instead of having to decide on just one glass of wine or commit to sharing an entire bottle, focused wine flights are the way go. Typically offered in 2-oz pours of three different wines, the amount of wine is perfect for supplementing a meal. Flights allow the sommelier and staff to both introduce and educate their guests on what they consider to be some of the finest wines on the market. Guests are able to experience the wines in a casual yet highly informative format. Wine flights allow staff to curate unique combinations based on almost anything, such as regions around the world, obscure grape varietals, and wine styles.
• 2016 saw the rise of the ‘cocktail consultant.’ These cocktail geniuses are taking bar programs and training of bar staff to a whole new level. Food is no longer the only attraction; the cocktail menu is a big draw and has a point of view as strong as what’s coming out of the kitchen.
• Bartenders are now taking classic cocktail concepts and essentially making them their own. The cocktails are recognizable, yet there is something significantly unique about them. These bartenders are reinventing old recipes to showcase specific nuances, esters, and textures that they feel best express their connection to the cocktail.
• Expect draft lattes and more nitro coffee kegs and taps. These are not easy to pull off logistically, but there is a strong desire for independents and chains to offer a more boutique experience.
• Over the past few years alternative packaging for wine have been on the rise due to more casual consumption and a desire for recyclable and sustainable footprints. Several new wines in a can entered the market in 2016 and are experiencing solid growth. Kegs were predicted to be the wave of the future for serving wine in restaurants, but adoption has been slow due to cost of installation and infrastructure for delivery with wholesalers. New distribution methods are afoot, so kegs may begin to gain traction with independent restaurants and chains.

Concept Trends
• Today’s guest wants to be in control of how and when they experience what a restaurant has to offer. With increased competition, restaurants have to cast a wide net to attract a wide audience. Restaurants are giving away a bit of control and saying ‘Yes’ more often. This gives guests the ability to come in for one drink at the bar, have a few dishes to share at the table or make time for an extravagant dinner. These concepts require careful staff training and a watchful eye on check average

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019
• 76 •
to maintain profitability.

• First appearing in 2015, food hall popularity exploded in 2016 across the country. This trend is great for the individual operators inside, where low barriers to entry give the flexibility to experiment.

• Restaurants are more about entertainment than ever before. Knowing that people come for more than a meal – they come for the feel – restaurants are putting equal effort into environment design as they are into the food and drink menus.

• There is a rise in creative ways to use flexible space to draw crowds (and boost revenues) at all times of day. Restaurants are turning into markets and co-working spaces. We’re also seeing retail spaces entering into the restaurant realm with some notable acquisitions and openings.

• Over the last few years, there has been a boom in the fast-casual field. Among the increasing number of fast-casual options, cafeteria-style operations are growing in popularity. Offering a wide variety of options to guests – from hot to cold, healthy to indulgent – it’s no surprise this industry keeps growing.

• “Everything Old is New Again”, as younger generations discover and adopt elements from the past for the first time as their own. In 2017, there will be an increased emphasis on immersive experiences designed to transport the guest into a different place and time.

• Guests are seeking experiences they can share and talk about the next day. While success always starts with great food and service, restaurants are looking to develop closer ties with their guests by bringing them into the fold. Showcasing the process and giving the guest an exclusive preview can help create a memorable experience. Sadelle’s in New York City has an exposed bagel bakery. Pausa (San Mateo, CA) has a showcase dough room and chef’s table within the kitchen. Tasting Counter (Boston, MA) has a 20-person U-Bar where diners watch every step of meal being prepared. And Barbacco (San Francisco, CA) serves pasta table-side during their new series of monthly pasta dinners.

Business Trends

• More than ever before, restaurateurs are caring about the quality of life of their team members. Labor shortages have made the best people more valuable and that means those team members can demand better compensation and benefits. From Danny Meyer’s announcement of his groundbreaking parental leave program to Ryan Cole’s (from Hi Neighbor groups) ‘build your own benefits program’, complete with commuter reimbursement checks and wines classes, a lot more creative solutions to keeping people happy and healthy will appear.

• The no-tipping concept hasn’t taken hold. There has been some back tracking over the past year as several notable proponents have changed or modified their policy. The tipping experiment at Joe’s Crab Shack lasted only three months; customer confusion was cited as one of the reasons for ending the program. To prevent staff attrition and improve operations, Bar Agricole (San Francisco, CA) reverted to conventional tipping model.

• Guests are eating out more, but spending less time in sit-down restaurants. So,
restaurants are claiming a stake in dining delivery. Challenges are there in terms of vehicles and quality control, but more and more operators are seeing this as a revenue stream on its own as well as a marketing tool for getting and keeping the buzz.

- There’s no doubt that Millennials are very important, but Boomers should not be written off. They still spend the most in restaurants, according to Nations Restaurant News, and the second-largest share of restaurant visits comes from Gen Z. Although Gen Z makes the majority of their restaurant visits to quick service chains, these kids and teens share more of their meals than any other generation, and they are eating better than previous generations, making healthier choices.
- Restaurants are more and more about a lifestyle and can benefit from partnerships with products and services that speak a similar message to the same target audiences.
- Although we’ve seen pop-ups increasing over the last few years, 2017 will be no exception. Operators and chefs get creative around partnerships, promotions, and space utilization to keep things fresh for guests and increase topline revenue.

14.3 Baum + Whiteman
Baum + Whiteman annually develops lists of restaurant and hotel food trends. The following is Baum + Whiteman’s Hottest Food & Beverage Trends for Restaurants and Hotel Dining for 2017:

Artisan Butchers Partner With Restaurants
- With chefs devising new ways to highlight vegetables, a counter trend arises: Glorify great meat by partnering an artisan butcher shop to a restaurant. The idea is to wow consumers with nose-to-tail butchery of humanly-raised animals that lend their pasture-grazed protein to charcuterie and innovative cuts of meat.

Bowls
- It began with acai bowls for breakfast and then spread to fast-casual when chains discovered their customers were rejecting breads and wraps in favor of greens and grains. The ramen trend accelerated eating from bowls. Office workers are discovering that takeaway bowls are less likely to spatter their laps and laptops, and chefs are finding that assembling a decorous bowl is easier and faster than the complexity of plating upscale entrees.

Breakfast Is Becoming Brunch
- After years of denial, McDonald’s discovered the virtues of all-day breakfast and its competitors abruptly ramped up their own offerings. Jack-in-the-Box launched “Brunchfast” with an assortment of heavier items, for example, and Starbucks spiced up its breakfast sandwiches and is testing weekend quiche and french toast. Smaller chains and independents are creating weightier breakfast items that qualify as round-the-clock meals.
Continued Popularity Of Vegetables
• Vegetables in 2017 will extend their domination of the dinner plate, pushing animal protein to the edges or off the plate altogether. The growing impact of veg-centric dining is evident as some steakhouse replace ‘sides’ by moving vegetables to the middle of the menu. We’re seeing a surge of serious chefs tilting their menus toward vegetables but equally significant is the similar emphasis among fast-casual chains.

Falling Food Prices Are Killing Restaurants
• Wholesale prices of meat, chicken, eggs and other essential commodities have plummeted. But restaurants, and chain restaurants in particular, have been closing units. One reason: Highly competitive supermarkets are passing savings to customers in the form of cheaper prices. But restaurants are hiking prices as they grapple with rising rents and wages, increasing health care costs, parental leave and other mandates. Supermarkets benefit by employing far less labor per dollar of sales than do restaurants and consumers, acutely aware of the widening cost gap between eating out and eating home, are shifting behavior.

Fast-Casual
• There seemed no limit to how much traffic the growing crop of fast-casual restaurants could steal from casual-dining chains and fast food outfits. That is, until late 2016 when customer counts turned down a bit, to everyone’s surprise. Maybe it’s a statistical blip or maybe too many fast-casual startups are diluting the market and maybe the entire field is getting overcrowded.

Freakshakes
• This fad began in Australia, took root in the U.K. and now has landed in the U.S. Explanation: A freakshake is a freestyle milkshake topped ice cream, as much sauce and whipped cream as possible and then surmounted by insane quantities of cake, cookies, donuts, ice cream sandwiches, and various candies. Freakshakes run rampant on Instagram.

Innovation
• In years past, changes in the way we eat emerged from the world of restaurants: chipotle peppers, sushi, pesto, carpaccio, lemongrass, foie gras, blackened redfish, and shiitake mushrooms all migrated from restaurants through food journalists to greengrocers’ and supermarkets’ shelves. But it is not that way now, particularly among corporate restaurants which are mired in a long moment of inertia and shying away from risky innovation. Now, America’s hot new flavors are found in the packaged snacks and beverage aisles of your local supermarket. There are dozens of products and startup brands, most of which you won’t find in restaurants. Venture capital is raining on these visionaries because Big Food fumbled at innovation ... the giants are too large to overcome corporate inertia.
More Competition for Restaurants
• It’s tough for restaurants when other retailers – department stores, drug stores, meal kits purveyors, supermarkets, upscale clothing boutiques – continually poach customers. Now, restaurants find themselves competing with their own suppliers. Kellogg’s, for instance, opened a cereal restaurant in the middle of Times Square, Chobani yogurt has a branded storefront cafe, Pepsi has a highly promoted cola-nutcentric restaurant/event space near New York City’s Chelsea Market, and Boars Head licensed its name and logo to a new deli in downtown Chicago.

Ramping Up The Spice
• No question that America’s pepperheads demand ever-increasing levels of spice. And the more different spices in a single dish, the better they like it. According to Innova Market Insights (www.innovadatabase.com), use of cayenne pepper rose 47% in product launches last year. Other trending spices: caraway (up 40%), saffron (up 31%), horseradish (up 29%), and turmeric (up 21%).

Restaurants Without Seats; Seats Without Restaurants
• ‘Virtual restaurants,’ part of the sharing economy, are upending traditional restaurant thinking. Independent startups as well as some established restaurants are creating delivery hubs – commercial kitchens in offbeat, low-rent locations staffed by professional cooks. With no seats, their sole purpose is efficient meal delivery to people’s homes. They are low-investment restaurants without dining rooms.

Sea Vegetables
• As the popularity of kale wanes on restaurants, savvy restaurateurs are focusing on what’s next. According to one culinary source, “kale continues to disappear from snacks while sea vegetables find new formats.” One reason for the rise of various seaweeds is the increased popularity of ramen, where seaweed is the foundation of many broths. Another reason is that seaweed packs a wallop of umami, so chefs are using it into finishing salts and oils, in fish sauce, incorporated into pasta.

Vegetables Are the New Comfort Foods
• An analysis of Pinterest’s users suggests that people are sifting the concept of comfort away from ‘emotional’ dishes like mac-and-cheese to dishes that reflect more healthful considerations. The word ‘veggies’ in Pinterest comfort food searches rose 336% in 2016; lasagna, macaroni and stroganoff were off 69%, 55%, and 50%, respectively. Consumers also are learning to swap mashed cauliflower for rice and pasta, and they’re doing it themselves or buying the items at growing numbers of food shops.

These trends are presented in-depth at www.baumwhiteman.com/2017trends.pdf.
14.4 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 2017 is as follows:

**Egg Yolks: The Sunny Side of Flavor**
- The popularity of egg yolks extend beyond breakfast. Taking on the different tastes and styles of each dish, yolks add excitement, protein and exceptional flavor.

**Modern Med**
- Melding Eastern Mediterranean ingredients with Western European classics, cooks can create homey dishes with a fresh take.

**Plancha: Flat-Out Grilling**
- Create a sizzling, smoky sear and flavor crust while grilling on the plancha, a thick, flat slab of cast iron delivering intense heat. Marry it with bold sauces, rubs, and glazes and it’s no wonder why the plancha is a way of life in Spain, France’s Basque region as well as Mexico.

**Sweet on Pepper**
- Pepper’s tongue-tingling, bold edge is tempered by naturally sweet ingredients like syrups and exotic fruits. After hiding in plain sight for so many years, pepper is finally capturing the spotlight.

14.5 Nation’s Restaurant News
Senior food editors at Nation’s Restaurant News expect to see the following trends in 2017:

**Cold-Brew Coffee**
- Steep ground coffee is high in caffeine and subtly sweet, lower in acid and less bitter than conventional coffee. Popular among younger consumers, Starbucks and Dunkin’ Donuts have introduced cold brew items.

**Indian Cuisine**
- Indian influences are coming into the spotlight on menus outside Indian specialty restaurants. Curry, for instance, will be incorporated in dishes from chicken salad to mashed potatoes.

**Ordering via Digital Assistants**
- Domino’s, among others, have integrated ordering technology with popular digital assistant products.
“The growing adoption of in-home, voice-responsive digital assistants like Amazon Echo and Google Home have given pizza chains a new platform to reach customers.”

Ron Ruggless, Senior Editor
Nation’s Restaurant News, 1/16/17

Ordering Via Social Media
• In lieu of proprietary apps, some restaurant chains are integrating ordering into social media such as Twitter and Facebook Messenger.

Shakeout Among Restaurant Chains
• A shakeout is anticipated as the restaurant sector has reached capacity and traffic has declined.

“Simply put: There are too many places to eat and not enough meals to go around. Expect more closures, particularly in casual dining, but also among traditional quick-service concepts and, maybe unsurprisingly, a few fast-casual chains that jumped too quickly onto some bandwagons.”

Jonathan Maze, Senior Finance Editor
Nation’s Restaurant News, 1/16/17

Unstaffed Grab-And-Go
• Amazon’s first bricks-and-mortar store, which opened in Seattle in 2017, lets customers select prepared food items and leave the store without checking out, with payment handled digitally.
Vegetables
• Vegetable menu items will be increasingly popular in restaurants in 2017.

“There’s a lot of talk of cauliflower becoming the new kale, and of spiralized zucchini replacing pasta. The bottom line is that Americans say they’re interested in eating more vegetables, but they’ve shown that they’re not going to give up on taste to do it.”

Bret Thron, Senior Food Editor
Nation’s Restaurant News, 1/16/17

14.6 Sterling-Rice Group
Sterling-Rice Group foresees the following as cutting-edge dining trends in 2017:

Chocolate For Breakfast
• A recent study from researchers at Syracuse University confirmed the benefits of dark chocolate, specifically on cognitive function such as abstract reasoning and memory, focus. The study suggested that eating chocolate prepares people more for their workday, so what better day part to incorporate dark chocolate than into breakfast. This study follows research from Tel Aviv University that suggests eating dessert at breakfast supports weight loss.

Cook and Connect
• Likened to businesses like Uber and Airbnb, a new app and web site called EatWith connects people with home cooks. Food has always been a way to bring people together and the concept of EatWith is a personalized experience where people can meet over dinner in the host’s home.

Dosha Dining
• The rise of turmeric as a trending ingredient in recent years has become a gateway to American exploration of Ayurveda. Indians believe in the concept of dosha, or the body’s set constitution. Along with the popularity of yoga, people are starting to look into Ayurveda to see what foods they should avoid and what foods might be good for their constitution. As people realize turmeric is enhancing their lifestyle and preventing disease and helping with inflammation, turmeric is increasingly seen as a good balancing additive for food.
Food Waste Frenzy
• Consumers and companies alike are reducing food waste by repurposing typically tossed-out stems, skins, and rinds. This trend is driven by Millennials’ desire to make the earth a better place by finding ways to repurpose and use things that would ordinarily be discarded. Examples include watermelon rinds being made into pickles and making cauliflower rice using the stem.

Goat
• Goat is potentially the next hot protein to hit plates in the United States. Goat has much less fat than most other meat, including chicken, and it’s high in protein. Sixty-three percent (63%) of the world already consumes goat, and with the rise in goat’s milk products, people should be willing to take the leap to goat meat. The trend has already begun. The Girl and the Goat (Chicago, IL) serves goat empanadas with miso-blue cheese aioli and a squash-apple slaw, while Tail Up Goat (Washington, DC) makes lasagna with goat, kale, anchovy, and salsa verde.

Migratory Meals
• Refugee populations are planting culinary flags in their new home countries, inspiring unique fusions of flavor and heritage. Middle Eastern fusion cuisine, led by Persian influences, with pomegranate, sour cherries, sumac, fenugreek, and orange blossom, will be combined to the base of more traditional Afghani cuisine.

Mocktail Mixology
• Mocktails are getting a modern makeover, with offerings featuring fresh-pressed juices, flavored teas, sipping vinegars, and muddled herbs and spices. Patrons watch mixologists muddle herbs and it feels like a special treat.

Noodles
• Offering authentic taste and showmanship, hand-pulled noodles are hot in big-city Chinese restaurants. The fresh preparation method touches on showmanship as well as an authentic, artisanal craft way of eating focusing on technique. Restaurants featuring the trend include The Handpulled Noodle and Xian Foods in New York City, and Kam Hong Garden in Los Angeles.

Plant Butchery
• Chickpeas, corn, legumes, and fungi are standing in for steaks in an emerging crop of butcher shops with products designed to appeal to vegans and carnivores alike. Retail shops are popping up that cater to people who don’t want to eliminate meat from their diet but might want to eat it less often. At Herbivorous Butcher (Minneapolis, MN), for example, customers may order meatless barbecue ribs, pepperoni, and teriyaki jerky that resemble their counterpart cuts in taste and texture.
Sardines
• People think of sardines as something that their grandfather would eat. But a couple brands out of Portugal are putting a modern spin on sardines. They are adding interesting flavors, smoked varieties, and plump, unctuous looking pieces of fish. Sardines are high in omega-3 fatty acids, high in protein, high in umami flavor, all things that are trending. In restaurants, the rise of toast’s popularity presents an opportunity to offer sardines as a topper.

14.7 Technomic

2017 Consumer Trends Forecast, by Technomic (www.technomic.com), identified five themes that will define consumer foodservice behavior in 2017, as follows:

Creating Community
• Concepts will increasingly be positioned as places for people and communities to connect, give back, recuperate, and foster diversity and inclusivity.

Food Beyond Fuel
• Healthy intentions are starting to drive heathier orders, even away from home. Operators will increasingly tout a balanced approach as the “best medicine” to support an overall healthy lifestyle.

Old World Revival
• Today’s consumers crave new foods and experiences but seek the comfort that familiar options provide. Look for more modern, unique twists on classic fare.

Patronage Polarization
• Instability has reached new levels due to increasing uncertainty. Though lower- and middle-class consumers will curb foodservice spending until instability subsides, few cutbacks among affluent consumers are likely.

Robotic Takeout Tech
• More operators will provide technology such as delivery drones and robots, chatbots, and enhanced online ordering to drive off-premise sales.

14.8 The NPD Group

The NPD Group identified the following five trends to watch in the restaurant sector in 2017:

Companies Will Win By Getting Personal
• Even in a mature, low-growth environment, there will be opportunities for double-digit growth. But more than ever, the consumer is in charge. Access to information is empowering people to do things on their terms. The days of a
one-size-fits-all blockbuster idea are over. Consumers will seek out foods with a variety of value-added attributes (fresh, natural, organic), positive benefits (energy, brain food, etc.) and social value (local, sustainable, transparent). Some of these opportunities may seem small by big company standards, but that is where the growth is.

Experience Will Make The Difference
• To stand out, food manufacturers, retailers, and foodservice operators must go beyond sustenance. People will seek out experiences, whether through exploring street food vendors, emerging ethnic flavors, or hands-on experiences, such as learning new food prep techniques.

The Battle For Share Of Stomach Will Intensify
• For several years now, more than 80% of meals have been sourced from home; fewer than 20% have been sourced from foodservice, and dollars are evenly split between the two. Food manufacturers will benefit from a trend toward eating meals at home by capitalizing on consumers’ desires for fresh, authentic foods. Foodservice operators will increasingly leverage technology to conveniently get their food on the in-home table. At the intersection of this trend is the retailer, who will continue to blur the line between retail and foodservice.

The Definition Of Meal Occasions Will Evolve
• People aren’t adding new eating occasions to their day, but how meal and between-meal occasions are composed will continue to change. Foods that offer the flexibility to compose an eating occasion to fit specific needs at a given time will grow, whether packaged goods or foodservice offerings. Consumers will make choices on price point, portion control, and portability – whatever allows them to craft a snack or full meal, spend a little or a lot, take a break or eat on the run.

Watch For The Continued Development Of The “Blended Meal”
• Consumers are dining at home more, and they value fresh and authentic foods, but convenience remains an important part of the equation. People don’t always source meals entirely at home or away. Look for various components of “homemade” meals to be sourced from items fully or partially prepared. Opportunity exists all along the preparation spectrum, from meal kits to restaurant delivery.
MARKET TRENDS

15.1 Key Trends In 2017

2017 Restaurant Industry Outlook, by the National Restaurant Association (www.restaurant.org), identifies five key trends to shape the restaurant industry in 2017, as follows:

A Challenging Business Environment
• While restaurant operators generally are optimistic about the outlook for future business, a range of challenges put a damper on their enthusiasm in 2017. Rising labor costs and a complex legislative and regulatory landscape on federal, state and local levels add pressure on business performance and bottom lines.

Recruiting Is A Top Challenge
• Recruitment and retention of employees continued to grow as a top challenge for restaurant operators in 2017. As the economy keeps improving and employment levels rise, there is more competition for qualified employees to fill vacant restaurant positions.

Elevated Pent-Up Demand
• Consumers’ pent-up demand for restaurant services remains high compared to historical levels. As Americans remain relatively cautious with their spending in 2017, restaurant operators will engage in social media marketing and other innovative tactics to highlight exceptional quality, service and value to nudge consumers into action.

Technology Gains Ground
• Technology adoption will keep growing among restaurant operators in 2017, but not without challenges. Cost in various forms remains a significant barrier, and while acceptance of the more common types of restaurant technology – such as online ordering, kiosks and mobile payment – gains ground among consumers, some are still on the fence about more advanced technologies.

Food And Menu Trends Lean Toward Concepts
• As their food-decision matrix grows increasingly complex, consumers will be more engaged and discerning than ever when dining out in 2017. Diners are more knowledgeable about food and have come to expect menu options that fit their dietary preferences no matter when or where they dine. This has resulted in food trends becoming more concept-based than ingredient-based, with an evolving focus on production, sourcing and preparation.
PART III: THE CUSTOMER
16

CUSTOMER PROFILE

16.1 Restaurant Visits By Age

According to The NPD Group (www.npd.com) and Nation’s Restaurant News, the distribution of restaurant traffic by age group in 2016 was as follows:
- Seniors (1945 and before): 8%
- Baby Boomers (1946-1964): 28%
- Generation X (1965-1979): 24%
- Generation Z (2001-present): 22%

16.2 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.

16.3 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.

16.4 Off-Premise Restaurant Customers
When choosing a restaurant for off-premise consumption, priorities by age are
as follows (source: Restaurant Business):

<table>
<thead>
<tr>
<th>Feature</th>
<th>18-to-34</th>
<th>35 and Older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenient location</td>
<td>46%</td>
<td>66%</td>
</tr>
<tr>
<td>Type of food</td>
<td>45%</td>
<td>58%</td>
</tr>
<tr>
<td>Fast service for to-go orders</td>
<td>39%</td>
<td>43%</td>
</tr>
<tr>
<td>Best overall value</td>
<td>37%</td>
<td>42%</td>
</tr>
<tr>
<td>Specific menu items available</td>
<td>36%</td>
<td>42%</td>
</tr>
<tr>
<td>Call-ahead ordering offered</td>
<td>31%</td>
<td>32%</td>
</tr>
<tr>
<td>Coupon or special offer</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Online ordering offered</td>
<td>29%</td>
<td>21%</td>
</tr>
</tbody>
</table>

“Older diners are looking for a convenient location while younger consumers want tech amenities.”

Restaurant Business, 1/17

16.5 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.

A 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%
17

DINING WITH CHILDREN

17.1 Dining With Children Under Age 13

Restaurant visits by families with children represent about $85 billion in annual sales, or 20% of total restaurant sales. According to The NPD Group (www.npd.com), families with children under age 13 make approximately 15 billion restaurant visits a year.

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.

When asked in a survey by The NPD Group 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 the 2017 Value & Pricing Consumer Trend Report, by Technomic (www.technomic.com), 34% of adults say kids-eat-free specials are very likely to influence them to visit a restaurant, an increase from 27% in 2015.

Many restaurants are incorporating kid-friendly design features to attract families with children. Such features include wide aisles to accommodate strollers and areas for kids to draw or play.

“Restaurants’ kid-friendly accommodations are getting the Millennial treatment. As the demographic ages, the industry is innovating to appeal to 24-to-39 year-olds, who are aging into parenthood and value kid-friendliness more than any other generation.”

Restaurant Business, 1/17
17.2 Dining With Children Under Age 18

Families with children under 18 years old made 26.7 billion restaurant visits, 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%.
18.1 Overview
The Hispanic- and Latino-American population at mid-year 2016 was 56.7 million, or 17.5% of the total U.S. population.

The Census Bureau projects that by 2050 there will be 102.6 million Hispanics living in the U.S., constituting 24% of the population. The percentage is projected to rise to 28.6% by 2060.

The Consumer Expenditure Survey, by the Census Bureau, reported that Hispanic households spend a higher proportion of their money on food (groceries and restaurants) than non-Hispanic households.

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 cater to the changing population mix.

18.2 Hispanic Restaurant Patronage
The 2017 Hispanic Foodservice Consumer Trend Report, by Technomic (www.technomic.com), provides the following assessment of restaurant patronage:

- Seventy-three percent (73%) of Hispanics visit restaurants at least once a week, an increase from 69% in 2015. Thirteen percent (13%) visit four or more times per week; 30% visit two to three times per week.
- Thirty-eight percent (38%) of Hispanic consumers’ snacks are purchased from a restaurant or other foodservice establishment.
- Thirty-seven percent (37%) of Hispanic diners eat at fine-dining restaurants at least once a month, an increase from 33% that did so in 2015.
- Thirty-four percent (34%) of Hispanic foodservice consumers visit fast-casual restaurants at least once a week, up from 26% in 2015 and 22% in 2013.
- Nineteen percent (19%) of Hispanic consumers’ restaurant purchases are ordered for delivery.

The following are some characteristics of Hispanic dining:

- Eighty percent (80%) of Spanish-dominant Hispanic consumers say they are much more likely to visit restaurants with Spanish-language promotional materials, compared to 16% of English-dominant consumers.
• Sixty-nine percent of Hispanic diners like to visit familiar restaurants, whether it’s the same few spots or a mix of different concepts.
• Fifty-nine percent (59%) of Hispanic consumers say it’s important for Hispanic food at American-style restaurants to taste authentic.
• Forty-nine percent (49%) of Hispanic consumers say loyalty programs encourage them to visit specific restaurants.
• Twenty-nine percent (29%) of Hispanic consumers say their children usually decide which restaurant or other foodservice location they visit.

“The three-quarters of Hispanic diners order food from restaurants at least once a week, compared to two-thirds of consumers overall. And that percentage is only increasing. It’s the fastest-growing ethnic group in the U.S., and as this demographic grows, so does its buying power. While some trends continue to remain important – like group dining options for large families and the availability of kids menus – their preferences and priorities have changed over time, finds Technomic’s 2017 Hispanic Foodservice Consumer Trend Report.”

Restaurant Business, 5/17

18.3 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>

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019
• 95 •
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 are much more likely to have children with them than non-Hispanics. The following are percentages of restaurant visits by Hispanic customers dining with children (source: The NPD Group):

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

### 18.4 Hispanic Brand And Menu Preferences

*Consumer Brand Metrics*, published by Technomic in April 2017, reported favorite restaurant brands among Hispanic diners as follows:

- In-N-Out Burger has the highest overall rating among Hispanic consumers.
- Among full-service restaurants, Denny’s has the highest percentage of Hispanic patrons who dine at least once per month.
- Among limited-service restaurants, Pollo Campero has the highest percentage of Hispanic patrons who dine at least once per month.

According to Technomic’s *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 cuisine is very popular 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.

“Hispanics are increasing visits to restaurants. I don’t think restaurant operators are doing enough to satisfy them and their needs.”

Bonnie Riggs, Analyst
The NPD Group
Nation’s Restaurant News, 6/20/16
19

MILLENNIAL CUSTOMERS

19.1 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.

19.2 Restaurant Visits By Millennials
The NPD Group (www.npd.com) reports that Millennials make about 13 billion visits to restaurants and foodservice establishments each year, spending $95 billion on meals and snacks.

According to The NPD Group, young Millennials (age 18-to-24) make 191 restaurant visits per capita; older Millennials (age 25-to-34) make 201 visits.

“Much of the restaurant industry is targeted toward Millennials. It’s a large group that tends to spend more of their income on restaurants. For instance, a Millennial man will spend 15% of his income on food, higher that the 12% the average consumer will spend, according to The NPD Group.”

Nation’s Restaurant News, 10/10/16
### 19.3 Dining Out

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

<table>
<thead>
<tr>
<th>Time</th>
<th>Total</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Breakfast</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>At least once a week:</td>
<td>22%</td>
<td>28%</td>
<td>15%</td>
</tr>
<tr>
<td>A few times a month:</td>
<td>16%</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>Rarely or never:</td>
<td>62%</td>
<td>54%</td>
<td>70%</td>
</tr>
<tr>
<td><strong>Lunch</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>At least once a week:</td>
<td>36%</td>
<td>44%</td>
<td>28%</td>
</tr>
<tr>
<td>A few times a month:</td>
<td>35%</td>
<td>32%</td>
<td>38%</td>
</tr>
<tr>
<td>Rarely or never:</td>
<td>29%</td>
<td>25%</td>
<td>34%</td>
</tr>
<tr>
<td><strong>Dinner</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>At least once a week:</td>
<td>38%</td>
<td>45%</td>
<td>31%</td>
</tr>
<tr>
<td>A few times a month:</td>
<td>42%</td>
<td>35%</td>
<td>48%</td>
</tr>
<tr>
<td>Rarely or never:</td>
<td>20%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td><strong>Weekend Brunch</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>At least once a week:</td>
<td>16%</td>
<td>22%</td>
<td>11%</td>
</tr>
<tr>
<td>A few times a month:</td>
<td>17%</td>
<td>19%</td>
<td>15%</td>
</tr>
<tr>
<td>Rarely or never:</td>
<td>67%</td>
<td>59%</td>
<td>74%</td>
</tr>
</tbody>
</table>

African-American and Hispanic Millennials dine out more frequently than the general Millennial population. The comparison is as follows:

<table>
<thead>
<tr>
<th>Time</th>
<th>Total</th>
<th>African-American</th>
<th>Hispanic</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Breakfast</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<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>
</tr>
<tr>
<td><strong>Lunch</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>At least once a week:</td>
<td>36%</td>
<td>43%</td>
<td>45%</td>
</tr>
<tr>
<td>A few times a month:</td>
<td>35%</td>
<td>32%</td>
<td>32%</td>
</tr>
<tr>
<td>Rarely or never:</td>
<td>29%</td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td><strong>Dinner</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>At least once a week:</td>
<td>38%</td>
<td>39%</td>
<td>45%</td>
</tr>
<tr>
<td>A few times a month:</td>
<td>42%</td>
<td>40%</td>
<td>36%</td>
</tr>
<tr>
<td>Rarely or never:</td>
<td>20%</td>
<td>20%</td>
<td>16%</td>
</tr>
<tr>
<td><strong>Weekend Brunch</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>At least once a week:</td>
<td>16%</td>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>A few times a month:</td>
<td>17%</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>Rarely or never:</td>
<td>67%</td>
<td>57%</td>
<td>54%</td>
</tr>
</tbody>
</table>
19.4 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>Restaurant Type</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 restaurant</td>
<td>7%</td>
<td>8%</td>
<td>7%</td>
</tr>
</tbody>
</table>

By ethnicity, responses were as follows:

<table>
<thead>
<tr>
<th>Restaurant Type</th>
<th>Total</th>
<th>African-American</th>
<th>Hispanic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hot new restaurant</td>
<td>12%</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>Favorite local/neighborhood place</td>
<td>40%</td>
<td>28%</td>
<td>40%</td>
</tr>
<tr>
<td>Casual chain restaurant</td>
<td>31%</td>
<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 restaurant</td>
<td>7%</td>
<td>10%</td>
<td>6%</td>
</tr>
</tbody>
</table>

19.5 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.
19.6 Favorite Restaurant Chains

In a January 2017 survey by Technomic (www.technomic.com), Millennials rated their favorite restaurant chains as follows:

**Casual-Dining Restaurants**
1. Cheddar’s Scratch Kitchen
2. Texas Roadhouse
3. Brio Tuscan Grille

**Fast-Casual Restaurants**
1. Raising Cane’s Chicken Fingers
2. Firehouse Subs
3. McAlister’s Deli

**Quick-Service Restaurants**
1. Tim Hortons
2. Chick-fil-A
3. In-N-Out Burger
20

GENERATION Z CUSTOMERS

20.1 Overview

The generation born in or after 2001 has been dubbed ‘Generation Z.’ They are also simply called ‘youth.’ Youth ages 10-to-12 are often referred to as tweens; teens are ages 13-to-17.

The U.S. Census Bureau (www.census.gov) estimated the 2016 Generation Z population at 65.26 million.

20.2 Restaurant Visits By Generation Zs

According to The NPD Group (www.npd.com), Generation Zs made 13.4 million restaurant visits in 2016, representing 22% of restaurant traffic. This was the second-largest share of restaurant visits, trailing only the 17.0 million restaurant visits by Baby Boomers.

Generation Z spending at restaurants in 2016 was $78.3 billion, or 18% of total restaurant spending. (The NPD Group defines Generation Z as people born after 1995.)

"Gen Z are very important and only going to get bigger. Now is the time to start building loyalty with them. They’re going to drive [restaurant] business in the years to come.”

Bonnie Riggs, Analyst
The NPD Group
Nation’s Restaurant News, 8/8/16

Generation Zs make the majority of their restaurant visits at quick-service chains, although older Zs – those between the ages of 11 and 19 – tend to visit fast-casual chains more. According to The NPD Group, 7% of the per capita visits made by older Gen Zs were to fast-casual chains, compared with 6% of per capita visits for Millennials.
and 5% for Gen Xers.

When visiting restaurants, Generation Zs tend to go out as a group and share their food. According to The Evolution of Eating Report, by The NPD Group, their average party size is 2.4, and they have a higher percentage of shared meals than any other generation.

Gen Zs’ food choices differ somewhat from older generations. For example, while hamburgers are among the top three foods Gen Zs eat at quick-service restaurants, they eat them less than Millennials, favoring chicken and pizza instead.

### 20.3 Restaurant Spending By Teens

Piper Jaffrey (www.piperjaffrey.com) conducts semi-annual surveys of teens about their spending.

In the Spring 2017 edition of Taking Stock With Teens, Piper Jaffrey reported the largest spending category was food, accounting for 24% of teen spending and passing spending on clothing for the first time. In spring 2014, spending on food had been 18%.

The Spring 2017 survey found a shift in preference toward limited-service restaurants, which were cited by 67% of teens as their favorite restaurant format. For comparison, 60% of teens preferred limited-service restaurants over full-service restaurants in Spring 2013. In Spring 2009, 57% of teens said they preferred full-service restaurants.

Among factors that were driving teen food spending decisions, Piper Jaffrey found taste and convenience ranked #1 and #2, respectively. Nutrition was the lowest-ranked attribute.

### 20.4 Favorite Restaurant Chains

In a January 2017 survey by Technomic (www.technomic.com), Generation Zs rated their favorite restaurant chains as follows:

**Casual-Dining Restaurants**
1. Chuy’s
2. Cheddar’s Scratch Kitchen
3. Chili’s Grill & Bar

**Fast-Casual Restaurants**
1. Raising Cane’s Chicken Fingers
2. The Habit Burger Grill
3. Corner Bakery Cafe

**Quick-Service Restaurants**
1. Potbelly Sandwich Shop
2. In-N-Out Burger
3. Chick-fil-A
21

CONSUMER PREFERENCES

21.1 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.

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

“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% |

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019
“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>Day</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>Dining</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>
“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></th>
<th>Highly Satisfied</th>
<th>Likely To Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diners with children under age 12:</td>
<td>62%</td>
<td>68%</td>
</tr>
<tr>
<td>Diners without children under age 12:</td>
<td>63%</td>
<td>64%</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 customers:</td>
<td>67%</td>
<td>57%</td>
</tr>
<tr>
<td>Returning customers:</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 have resolved to eat healthier:
- Casual-dining: 18%
- Fast-Casual: 18%
- Fast-Food: 18%

“The desire to eat more healthfully 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>Overall Satisfaction</th>
<th>Likely To Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager visible:</td>
<td>84%</td>
</tr>
<tr>
<td>Manager not visible:</td>
<td>65%</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></th>
<th>Overall Satisfaction</th>
<th>Experienced A Problem</th>
</tr>
</thead>
<tbody>
<tr>
<td>In person:</td>
<td>71%</td>
<td>12%</td>
</tr>
<tr>
<td>Telephone:</td>
<td>69%</td>
<td>15%</td>
</tr>
<tr>
<td>Online or fax:</td>
<td>61%</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>Taste of Food</th>
<th>Likely To Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub shop: 73%</td>
<td>67%</td>
</tr>
<tr>
<td>QSR: 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:

<table>
<thead>
<tr>
<th>Type of Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fine-dining</td>
<td>10.0%</td>
</tr>
<tr>
<td>Fast-casual</td>
<td>9.1%</td>
</tr>
<tr>
<td>Casual-dining</td>
<td>8.7%</td>
</tr>
<tr>
<td>Quick-service</td>
<td>7.7%</td>
</tr>
</tbody>
</table>

“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

21.3 Market Resources

Service Management Group, 1737 McGee Street, Kansas City, MO 64108.
(800) 764-0439. (www.smg.com)
22

CUSTOMER SATISFACTION

22.1 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.foresseeresults.com) sponsors the e-commerce and e-business measurements.

22.2 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>82</td>
<td>80</td>
</tr>
<tr>
<td>2015</td>
<td>82</td>
<td>77</td>
</tr>
<tr>
<td>2016</td>
<td>81</td>
<td>79</td>
</tr>
<tr>
<td>2017</td>
<td>78</td>
<td>79</td>
</tr>
</tbody>
</table>

22.3 Customer Satisfaction Scores
ASCI scores from 2017 surveys for restaurant chains and change from 2016 scores are as follows:
### Full-Service Restaurants
- **Cracker Barrel:** 84 (1.2%)
- **Texas Roadhouse:** 82 (no change)
- **Olive Garden:** 81 (no change)
- **Red Lobster:** 81 (2.5%)
- **Outback Steakhouse:** 80 (3.9%)
- **Applebee’s:** 79 (no change)
- **Ruby Tuesday:** 78 (no change)
- **Chili’s:** 77 (2.7%)
- **LongHorn Steakhouse:** 77 (-6.1%)
- **TGI Fridays:** 76 (-2.6%)
- **Denny’s:** 76 (2.7%)
- **Red Robin:** 73 (-8.8%)
- **All Others:** 78 (-3.7%)
- **Sector average:** 78 (-3.7%)

### Limited-Service Restaurants
- **Chick-fil-A:** 87 (no change)
- **Panera Bread:** 82 (1.2%)
- **Papa John’s:** 82 (no change)
- **Subway:** 81 (1.3%)
- **Arby’s:** 80 (no change)
- **Dunkin’ Donuts:** 79 (-1.3%)
- **Chipotle Mexican Grill:** 79 (1.3%)
- **Little Caesars:** 78 (-3.7%)
- **KFC:** 78 (no change)
- **Domino’s:** 78 (no change)
- **Starbucks:** 77 (2.7%)
- **Burger King:** 77 (1.3%)
- **Wendy’s:** 76 (no change)
- **Taco Bell:** 76 (1.3%)
- **Pizza Hut:** 76 (-1.3%)
- **Jack in the Box:** 75 (1.4%)
- **McDonald’s:** 69 (no change)
- **All others:** 82 (1.2%)
- **Sector average:** 79 (no change)

### 22.4 Market Resources
American Customer Satisfaction Index (ACSI), 625 Avis Drive, Ann Arbor, MI 48108. (734) 913-0788. ([www.theacsi.org](http://www.theacsi.org))

Foresee Results, 2500 Green Road, Suite 400, Ann Arbor, MI 48105. (800) 621-2850. ([www.foreseeresults.com](http://www.foreseeresults.com))
PART IV: THE MEAL
23.1 Regional Cuisine

Virtually every state and city 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 specialities (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

### 23.2 Ethnic Cuisine

*Global Palates, Ethnic And Flavors In America*, by the National Restaurant Association ([www.restaurant.org](http://www.restaurant.org)), reported adult consumption of ethnic and regional cuisine as follows:

<table>
<thead>
<tr>
<th></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>
<tr>
<td>Regional ethnic:</td>
<td>11%</td>
<td>23%</td>
</tr>
<tr>
<td>Spanish:</td>
<td>8%</td>
<td>22%</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>Preference</td>
<td>Familiarity</td>
</tr>
<tr>
<td>---------------------------</td>
<td>------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Middle Eastern</td>
<td>8%</td>
<td>35%</td>
</tr>
<tr>
<td>Southeast Asian</td>
<td>8%</td>
<td>15%</td>
</tr>
<tr>
<td>Belgian</td>
<td>7%</td>
<td>25%</td>
</tr>
<tr>
<td>Thai</td>
<td>7%</td>
<td>16%</td>
</tr>
<tr>
<td>German</td>
<td>6%</td>
<td>30%</td>
</tr>
<tr>
<td>French</td>
<td>6%</td>
<td>26%</td>
</tr>
<tr>
<td>Vietnamese</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Greek</td>
<td>5%</td>
<td>24%</td>
</tr>
<tr>
<td>Indian</td>
<td>5%</td>
<td>12%</td>
</tr>
<tr>
<td>Latin American/Nuevo Latino</td>
<td>5%</td>
<td>43%</td>
</tr>
<tr>
<td>Caribbean</td>
<td>4%</td>
<td>16%</td>
</tr>
<tr>
<td>Korean</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>Russian/Eastern European</td>
<td>3%</td>
<td>12%</td>
</tr>
<tr>
<td>Peruvian</td>
<td>2%</td>
<td>10%</td>
</tr>
<tr>
<td>Scandinavian/Nordic</td>
<td>1%</td>
<td>8%</td>
</tr>
<tr>
<td>Brazilian/Argentine</td>
<td>1%</td>
<td>7%</td>
</tr>
<tr>
<td>Ethiopian</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

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%) of 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

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
- Japanese
- Italian

Forty-one percent (41%) of full-service restaurants are ethnic.
According to the U.S. Census Bureau (www.census.gov), the distribution of the 232,000 full-service restaurants in the United States by type of cuisine is as follows:

- Mexican: 9.4%
- Italian: 9.2%
- Chinese: 8.6%
- Other ethnic: 13.5%

“What’s the most popular type of full-service restaurant in the United States? The answer is ‘other ethnic’ – a category that includes Thai, Indian, Cambodian, Japanese, Ethiopian, and all other ethnic restaurants except Mexican, Italian, and Chinese. There are 31,000 ‘other ethnic’ restaurants, accounting for 13.5% of the nation’s 232,000 full-service restaurants.”

Demo Memo, 8/16/17
24

DAYPARTS

24.1 Daypart Traffic
According to 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) assessed the distribution of total restaurant traffic in 2016 and change from the prior year as follows:

<table>
<thead>
<tr>
<th></th>
<th>2016 Traffic</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakfast</td>
<td>17%</td>
<td>1%</td>
</tr>
<tr>
<td>Lunch</td>
<td>34%</td>
<td>-2%</td>
</tr>
<tr>
<td>Dinner</td>
<td>31%</td>
<td>no change</td>
</tr>
<tr>
<td>Snacks</td>
<td>18%</td>
<td>3%</td>
</tr>
</tbody>
</table>

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 27 of this handbook. The increase in snacking was, in part, the reason for the decline in lunch traffic at restaurants in 2016.

_________________________________________________________________

“Lunch takes a hit as consumers embrace heartier and more frequent afternoon snacks.”

Nation’s Restaurant News, 3/13/17

_________________________________________________________________
24.2 Breakfast

According to The NPD Group, the average annual number of breakfast occasions per person in 2016 was 361, an increase from 350 in 2010.

“The telling Americans that breakfast is the most important meal of the day is a moot point. They get it.”

The NPD Group, 5/16/16

The NPD Group assessed that the breakfast category is a $50 billion market, with more than 12.5 billion visits to restaurants at breakfast time. Overall, 17% of all restaurant visits are for breakfast. Breakfast/morning meal visits grew by 1% in 2016.

When people eat their morning meal away from home, 48% order a breakfast sandwich, according to Datassential (www.datassential.com). Also popular are breakfast bowls, which are viewed as among the healthiest morning meal options. Datassential’s MenuTrends reported that breakfast bowls appeared on 7% of breakfast menus in 2016, an increase of 66% from 2012.

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.

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 coffee.

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

The NPD Group forecasts that total breakfast occasions, in- and away-from-home will increase by 5% through 2019.

24.3 Lunch

Lunch accounts for 34% of restaurant visits. According to The NPD Group, lunch visits to restaurants dropped 2% in 2016 after increasing 1% year-over-year in 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. But there are several other reasons for the decline in lunch traffic at restaurants.

“NPD attributes part of the blame for lackluster lunch traffic on the increase in home-based employees and the nonstop growth of online shopping. More telecommuters and fewer shoppers out at the malls translate to less traffic at lunch. Potential lunch customers also suffer just a little from sticker shock. Menu prices have increased past the point where some consumers feel comfortable paying them.”

Restaurant Hospitality, 11/16

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 store items: 3%
- Deli: 3%
- QSR Asian: 3%
- Casual-dining varied menu: 2%
- Family style: 2%
- All other: 22%
Lunch menu preferences are found to vary significantly in major cities across the United States.

“The most popular lunches in major cities might surprise you: In Boston, Mediterranean lunches are tops; New Yorkers go for the Cuban sandwich; Philly lunches aren’t cheesesteak, but sushi, Caribbean or Mediterranean instead; Atlanta and Nashville both go for barbecue; and in Los Angeles, Chinese food is the lunch of choice.”

*Nation’s Restaurant News, 3/13/17*

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### 24.4 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 were flat in 2016 after dropping 2% in 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>28%</td>
</tr>
<tr>
<td>32-to-43:</td>
<td>19%</td>
</tr>
<tr>
<td>44-to-51:</td>
<td>20%</td>
</tr>
<tr>
<td>52-to-61:</td>
<td>16%</td>
</tr>
<tr>
<td>62 and older:</td>
<td>17%</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.

### 24.5 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.
25

MEALPARTS

25.1 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

The Starters, Small Plates & Sides Consumer Trend Report, published in August 2017 by Technomic (www.technomic.com), provides the following assessment:
Sixty-two percent (62%) of adults say it’s important that they can choose the side that comes with their entree.
Fifty-one percent (51%) of adults are more willing to try a new flavor or ingredient in a small plate than in an entree.
Thirty-eight percent (38%) of adults strongly agree that they sometimes visit a certain restaurant because they are craving a specific appetizer.

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

25.2 Appetizers

In a survey by Technomic, 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>Appetizer</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>Fries, potato skins</td>
<td>10%</td>
<td>31%</td>
<td>69%</td>
</tr>
<tr>
<td>Chips &amp; salsa</td>
<td>9%</td>
<td>20%</td>
<td>80%</td>
</tr>
<tr>
<td>Wings</td>
<td>8%</td>
<td>33%</td>
<td>67%</td>
</tr>
<tr>
<td>Onion rings</td>
<td>7%</td>
<td>21%</td>
<td>79%</td>
</tr>
<tr>
<td>Fried cheese sticks</td>
<td>6%</td>
<td>31%</td>
<td>69%</td>
</tr>
<tr>
<td>Nachos</td>
<td>6%</td>
<td>39%</td>
<td>61%</td>
</tr>
<tr>
<td>Dip (spinach, taco, etc.)</td>
<td>5%</td>
<td>43%</td>
<td>57%</td>
</tr>
<tr>
<td>Shrimp cocktail</td>
<td>5%</td>
<td>12%</td>
<td>88%</td>
</tr>
<tr>
<td>Spring/egg rolls</td>
<td>4%</td>
<td>13%</td>
<td>87%</td>
</tr>
<tr>
<td>Quesadilla</td>
<td>4%</td>
<td>59%</td>
<td>41%</td>
</tr>
<tr>
<td>Chicken strips</td>
<td>4%</td>
<td>35%</td>
<td>65%</td>
</tr>
<tr>
<td>Hummus</td>
<td>3%</td>
<td>56%</td>
<td>44%</td>
</tr>
<tr>
<td>Calamari</td>
<td>3%</td>
<td>13%</td>
<td>88%</td>
</tr>
<tr>
<td>Cheese ball/cubes/slices</td>
<td>3%</td>
<td>73%</td>
<td>27%</td>
</tr>
<tr>
<td>Guacamole</td>
<td>3%</td>
<td>64%</td>
<td>36%</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:
25.3 Dessert

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

While sugar consumption is viewed as unhealthy by many consumers, certain fats are being viewed more favorably and dessert consumption in restaurants is on the rise.

“While some former nutritional bogeymen, such as butter and eggs, are rehabilitated in the eyes of consumers, sugar remains dieting enemy No. 1. None the less, dessert has risen slightly over the past five years. According to Datassential, the most popular dessert fat – butter – appears on 20% more dessert menus than it did five years ago.”

*Nation’s Restaurant News, 4/4/16*
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 is as follows (source: Datassential):

- Quick-service: 11.3
- Fast-casual: 10.4
- Fine-dining: 9.3
- Casual-dining: 8.3

The 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.

### 25.4 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 a 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 now sells more bowls than burritos.

“Sales of entrees served in bowls are up significantly over the past five years. Chefs like how they mix flavors while diners view them as healthy.”

*Time*, 4/4/17

25.5 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.

“Salad is no longer just a side dish or obligatory menu item for dieters, but a main-meal experience. As consumer interest in salad has grown in recent years, restaurants are revamping or adding new offerings with more intense flavors, contrasting textures and innovative ingredient combinations to create salads that satisfy – and sell.”

*Nation’s Restaurant News*, 4/17/17
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 compared with two years prior as follows:

- Kale: 248%
- Quinoa: 116%
- Beets: 52%
- Aioli: 42%
- Atlantic salmon: 40%
- Apple: 36%
- Fennel: 31%

_________________________________________________________________

“American consumers have long shown us that, no matter how much they’d like to eat more healthfully, they’re not going to sacrifice on taste. That means that even when their meal is a salad, they want it to taste great.”

Restaurant Hospitality, 2/17

_________________________________________________________________

25.6 Sides

In a 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 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.
“The once-humble side dish is stepping up, grabbing attention and raising check averages as chefs rev up parts of the meal that used to be afterthoughts.”

Nation’s Restaurant News, 9/19/16

25.7 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%
“More comforting than salad and easier on operations, soups, stews, and chilis are appearing more frequently as main courses on menus, up 3.3% over the past four years, according to Datassential, while they’re on the decline as appetizers and sides.”

Nation’s Restaurant News, 2/6/17
26.1 Beef & Pork

According to the U.S. Department of Agriculture (USDA, www.usda.gov), beef and pork consumption were 55.6 pounds and 50.1 pounds per capita, respectively, in 2016. Per capita beef consumption decreased 14.5% during the 2007-2016 decade; pork consumption decreased 1.4%.

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

The 2017 Center of the Plate: Beef & Pork Consumer Trend Report, by Technomic (www.technomic.com), provides the following assessment:

- 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.
- Seventy-eight percent (78%) of adults say beef or pork described as ‘lean’ is healthier, and 42% say it is tastier.
- Seventy-six percent (76%) of adults’ meals include meat, poultry or seafood.
- More consumers now (61%) than in 2014 (56%) say flavors imparted by seasonings or spices are very appealing for pork dishes.
- Forty-seven percent (47%) of adults are highly likely to order beef dishes with spicy flavors at least occasionally.
- Forty-five percent (45%) of adults consider beef to be healthy because it’s high in protein.
- More consumers now (45%) than in 2014 (40%) say it’s important to know from which country the pork they eat is raised.
- Forty percent (40%) of adults are interested in trying ethnically-inspired pork dishes.

The National Cattlemen’s Beef Association (www.beefusa.org) reports that 8% of U.S. beef sales are to restaurants and foodservice establishments.

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

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%

According to Datassential, braised pork and pork belly have experienced more than 300% menu growth on breakfast menus since 2012; pork shoulder is up 277%.

### 26.2 Breakfast All Day

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, according to Nation’s Restaurant News.

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

McDonald’s launched all-day breakfast service in 2015. An assessment by The NPD Group found orders of breakfast foods throughout the day increased to 47% post-launch. Among breakfast menu items, breakfast sandwiches are particularly popular throughout the day.

“The fastest-growing snack throughout the day is the breakfast sandwich. The popularity of breakfast sandwiches has increased by double digits across all meal occasions, The NPD Group found. The success of this item can be attributed, at least in part, to the introduction of all-day breakfast at McDonald’s.”

*Nation’s Restaurant News, 3/13/17*
26.3 Burgers

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

Technomic estimated sales of burgers at restaurants in 2016 at $90.2 billion. The 2017 Burger Consumer Trend Report, by Technomic, provides the following assessment:

- Fifty-nine percent (59%) of adults find burger combo meals including a side and drink very appealing.
- Fifty-eight percent (58%) of adults say it’s very important that they can customize burger toppings.
- Fifty-six percent (56%) of adults eat burgers at least once a week.
- Fifty percent (50%) of adults say it’s very important that restaurants offer a wide variety of burger toppings.
- Thirty-seven percent (37%) of adults would consider ordering a burger topped with barbecue sauce.
- Thirty-five percent (35%) of adults say it’s very important that restaurants offer burgers with new and unique flavors.
- Twenty-six percent (26%) of adults say breakfast burgers are highly appealing, up from 22% in 2015.
- Twenty-two percent (22%) of adults eat mini-burgers or sliders at least once a month.

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.

With competition from upscale burger restaurants, sales of quick-service burgers have plateaued in recent years.

“The burger is America’s most-ordered menu item, but, in recent years, hamburgers, particularly at quick-service restaurants, have fallen a few notches on consumers’ must-order list. Consumption of quick-service burgers has stayed pretty much the same, while their price has steadily increased.”

Nation’s Restaurant News, 6/19/17
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.

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.

Technomic’s *Consumer Brand Metrics* (February 2017) reported consumers’ favorite chain restaurants for burgers as follows:
1. White Castle
2. Krystal
3. Burger King
4. In-N-Out Burger
5. Whataburger
6. Five Guys Burgers & Fries
7. Red Robin Gourmet Burgers & Brews
8. Carl’s Jr.
9. Fuddruckers
10. The Habit Burger Grill

### 26.4 Cake & Pie

The *Volumix Cakes and Pies Report*, by Technomic, reported sales for the cakes and pies category increased 5.5% year over year in 2016, with the largest sales increases occurring in the fine-dining, fast-casual, and casual-dining sectors.

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

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

According to Datassential, apple pie is the top menued pie at restaurants, followed by key lime, pecan, and lemon. Several new pie trends increased on restaurant menus – 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, with options like buttermilk custard, buttermilk chess pie, or à la mode options served with buttermilk ice cream.

### 26.5 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 91.0 pounds per capita in 2016. Per capita chicken consumption increased 4.3% during the 2007-2016 decade. U.S. chicken production in 2016 was 54.3 billion pounds, an all-time record and 2.0% higher than the output in 2015.

The 2017 Center-of-Plate: Poultry Consumer Trend Report, by Technomic, provides the following assessment:

- Fifty percent (50%) of adults say it’s important that they can customize the preparation style for the chicken they order.
- Forty-seven percent (47%) of adults strongly agree that restaurants should be transparent about where they source their poultry.
- Forty-five percent (45%) of adults strongly agree that restaurants should offer more chicken entrees with ethnic flavors or ingredients.
- Forty percent (40%) of adults would like restaurants to offer a wider variety of turkey sandwiches.
- Thirty-nine percent (39%) of adults are more likely now than two years ago to order turkey outside of the holiday season.
• Thirty-nine percent (39%) of adults would order a turkey-based burger for lunch or dinner, up from 33% in 2015.
• Thirty-six percent (36%) of adults strongly agree that it’s important for the turkey offered at restaurants to be from a well-known brand.
• Preference for chicken dishes with Asian flavors is highest among consumers living in the West.

Per-person chicken consumption in the United States has more than doubled over the past four decades, according to the USDA. Approximately 47% of chicken is consumed away from home.

________________________________________

“The greater growth in chicken consumption away from home is consistent with the introduction of chicken nuggets, chicken strips, and grilled chicken sandwiches and their rising popularity in fast-food and other eating out places.”

USDA Economic Research Service, 1/17

________________________________________

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.

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 2016 compared with 2011 to more than 2,000 restaurants.

Technomic’s Consumer Brand Metrics (August 2017) reported consumers’ favorite chain restaurants for chicken wings as follows:
1. Wingstop
2. Buffalo Wild Wings
3. Hooters
4. Beef ‘O’ Brady’s
5. Pizza Hut
6. Zaxby’s
7. Twin Peaks
8. Little Caesars
The National Chicken Council (www.nationalchickencouncil.org) estimates that Americans consume 1.25 billion wings on Super Bowl Sunday.

### 26.6 Eggs

According to the USDA, 102.0 billion eggs were produced in the U.S. in 2016, a 5.0% increase from the prior year. The value of egg production in 2016 was $6.48 billion.

When McDonald’s announced plans in early 2016 to use only cage-free eggs for its breakfast items within a decade, most major restaurant chains quickly followed suit.

The following are the dates by which restaurant chains have pledged to use only cage-free eggs (sources: The Humane Society [www.humanesociety.org]):

- Applebee’s: 2025
- Arby’s: 2020
- Au Bon Pain: 2017
- Bob Evans: 2025
- Burger King: 2017
- Caribou Coffee: 2020
- Denny’s: 2026
- Dunkin’ Donuts: 2025
- Einstein Bros.: 2020
- IHOP: 2025
- Jack in the Box: 2025
- McDonald’s: 2025
- Noodles & Company: 2016
- Panera Bread: 2020
- Qdoba: 2025
- Quiznos: 2022
- Shake Shack: 2016
- Sonic: 2025
- Starbucks: 2020
- Subway: 2025
- Taco John’s: 2025
- Taco Bell: 2016
- TGI Fridays: 2025
- Wendy’s: 2020
- White Castle: 2025
26.7 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 USDA – 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 2016 than it did four years prior, according to Datassential.

Datassential’s MenuTrends reports the top ingredients served with fries 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%

Technomic’s Consumer Brand Metrics (June 2017) reported consumers’ favorite chain restaurants for fries as follows:
1. Checkers Drive-In Restaurants
2. Five Guys Burgers and Fries
3. In-N-Out Burger
4. Smashburger
5. Charleys Philly Steaks
6. Chick-fil-A
7. McDonald's
8. Arby’s
9. Red Robin
10. Fuddruckers

26.8 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 19.4 million hot dogs were consumed in major league stadiums during the 2016 season. More than 2.6 million hot dogs were sold at Dodger Stadium, home of the Los Angeles Dodgers – the highest number among the 30 major league ball parks.

The following were the top hot dog and sausage consuming cities in 2016 (sources: Nielsen and the National Hot Dog & Sausage Council):

**Hot Dogs**
- Los Angeles, CA
- New York, NY
- Philadelphia, PA
- Boston, MA
- Phoenix, AZ
- Chicago, IL
- Atlanta, GA
- Detroit, MI
- Washington, DC
- Tampa, FL

**Sausage**
- Los Angeles, CA
- Chicago, IL
- New York, NY
- Detroit, MI
- Houston, TX
- Philadelphia, PA
- Atlanta, GA
- New Orleans, LA
- Washington, DC
- San Francisco, CA

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 jalapeño salsa, mayonnaise, mustard, and shredded cheese
• Southern Style Hot Dog: topped with coleslaw
• West Virginia Dog: topped with coleslaw, chili, and mustard

26.9 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 2016. 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 eat 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; 59% of the time that adults eat pizza, it for dinner.

Pizza is so popular 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 are the most popular types of pizza (percent of people who have eaten pizza 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*, by the Center for Generational Kinetics (www.genhq.com) and Smart Flour Foods (www.smartflourfoods.com), reported that 35% of Americans go out for pizza as well as 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.

Technomic’s *Consumer Brand Metrics* (March 2017) reported consumers’ favorite chain restaurants for pizza follows:
1. Cici’s
2. Jet’s Pizza
3. Sbarro
4. Papa Murphy’s Take-And-Bake
5. Uno Pizzeria & Grill
6. Pizza Hut
7. Hungry Howie’s Pizza
8. California Pizza Kitchen
9. Little Caesars
10. Marco’s Pizza

**26.10 Sandwiches**

According to The NPD Group, Americans consumed 12.5 billion sandwiches in restaurants in 2016. With takeout and delivery sandwiches, burgers, and wraps included the total increases to about 22 million.
The *Foodservice Prepared Sandwich Category Study*, published by Technomic in February 2017, assessed that sandwiches, burgers and other handheld items accounted for nearly one out of every four dollars spent in the foodservice channel in 2016, totaling just over $205 billion in sales. Burgers led the category with 44% of total handheld sales. Deli and submarine sandwiches follow at 13% and 11% of consumer spend, respectively. Rising in popularity are formats such as tacos, burritos, breakfast sandwiches, and wraps.

“Burgers and other traditional sandwiches remain the prominent choice for consumers who eat handhelds away from home today. However, with Millennial and Gen-Z consumers growing in spending power and cultural influence, ethnic flavors and non-conventional formats are redefining what Americans typically identify as a standard sandwich. These unique formats and flavors will grow as these younger populations mature.”

Technomic, 2/23/17

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 eaten 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.

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

<table>
<thead>
<tr>
<th></th>
<th>Pct. Who Have Eaten</th>
<th>At Home</th>
<th>Away From Home</th>
<th>Hot</th>
<th>Cold</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>In Past 2 Weeks</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<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>
</tbody>
</table>
Technomic’s Consumer Brand Metrics (May 2017) reported consumers’ favorite chain restaurants for sandwiches as follows:

1. Firehouse Subs
2. Jersey Mike’s Subs
3. Jimmy John’s Gourmet Sandwiches
4. Quiznos
5. Potbelly Sandwich Shop
6. Schlotzsky’s
7. Subway
8. Jason’s Deli
9. Arby’s
10. McAlister’s Deli

26.11 Seafood

According to the USDA, commercial fish and shellfish consumption was 14.2 pounds per capita in 2015 (most recent data available). Per capita seafood consumption decreased 4.3% during the 2006-2015 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 2017 Center-of-Plate: Seafood & Vegetarian Consumer Trend Report, by Technomic, provides the following assessment:

- Sixty-five percent (65%) of adults, and 71% of adults ages 35 and older, eat seafood at least once every 90 days.
- Fifty-eight percent (58%) of adults strongly agree that seafood is just as filling as meals that include meat.
- Thirty-nine percent (39%) of adults order seafood because it’s healthier than meat options.
Thirty-six percent (36%) would order fish and 32% would order shellfish dishes with ethnic flavors.

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.chefscollective.org), both of which work to educate fishers, chefs, and retailers on how to make 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.

26.12 Whole Grains

According to the International Food Information Council (www.foodinsight.org), 70% of U.S. adults say they are trying to eat more grains.

A survey by Mintel (www.mintel.com) found that 21% of adults said they were trying to order more whole grains in restaurants.

Datassential reported that the term “whole grain” was mentioned more frequently on menus in 2016 than four years prior. Among whole grains, quinoa is the standout, being listed in more than 7% of all restaurant menus and on about 20% of fast-casual menus.

The following is the year-over-year increase in menu occurrences of whole grains:

• Chia: 84%
• Sorghum: 45%
• Millet: 43%
• Quinoa: 34%
• Amaranth: 25%
• Flax: 24%
• Bulgar: 24%
SNACKS

27.1 Overview
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 (www.npd.com).

On average, adults snack on about 1,100 occasions per year, a count which includes non-restaurant snacking as well as consumption at restaurants. Baby Boomers snack on 1,200 occasions per person annually; Millennials do so on 1,000 occasions, according to The NPD Group.

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.

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, or cheese bites rather than a side of mac & cheese with the meal are increasingly satisfying off-meal-time cravings.

“More people are defining snacks as any item consumed outside traditional meal hours. In fact, 42% of consumers say that their definition of snacks has changed over the past two years, with three in 10 now considering more foods to be snacks, according to Technomic’s Snacking Occasion Report.”

Restaurant Business, 11/16
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.

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.

A 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.

### 27.2 Market Assessment

The National Restaurant Association (www.restaurant.org) assesses snack shop and nonalcoholic beverage bar sales at $40.8 billion for 2017, a 6.0% increase over 2016. Coffeeshops (see Chapter 33) account for almost half of the total.

Sixteen (16) snack chains (including ice/cream/frozen desserts and excluding coffeeshops) ranked among Technomic’s list of 250 largest U.S. restaurant chains in 2017: Auntie Anne’s, Baskin-Robbins, Braum’s Ice Cream & Dairy Stores, Cinnabon, Cold Stone Creamery, Dairy Queen/Orange Julius, Dunkin’ Donuts, Great American Cookies, Jamba Juice, Krispy Kreme, Menchie’s Frozen Yogurt, Rita’s Ice, Smoothie King, Tropical Smoothie Cafe, Wetzel’s Pretzels, and Yogurtland. Their combined sales were $16.5 billion; they operated 25,593 units.

### 27.3 Restaurant Snacks

According to the *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.

According to The NPD Group, visits to restaurants for snack occasions increased 3% in 2016, the highest increase among all dayparts.

“Snacking is growing at restaurants. Afternoon snack time is the strongest performing meal occasion.”

Bonnie Riggs, Analyst
The NPD Group
Nation’s Restaurant News, 3/13/17

27.4 Snacking Throughout The Day

Snacking In America, by The NPD Group, reported snacking throughout the day as shown in Figure 27.1.

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. Over 40% of snacks carried from home and eaten at school, work, in the car, or at other locations are better-for-you.

“Nearly half of all snack visits [to restaurants] occur in the afternoon, NPD found. Morning snacks represent 23% of the snack market and evening snacks account for 30% of snack occasions.”

Nation’s Restaurant News, 3/13/17
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.

27.5 **Favorite Snacks**

A survey by The NPD Group ranked top snack foods by generation as follows:

**Baby Boomers**
1. Fruit
2. Chocolate candy/candy bars
3. Potato chips
4. Nuts
5. Yogurt

**Millenials**
1. Fruit
2. Chocolate candy/candy bars
3. Potato chips
4. Tortilla chips
5. Cookies
“The top three snack food choices for both groups are the same but beyond that older consumers favor healthier options.”

Nation’s Restaurant News, 4/18/16

The most popular restaurant snacks by daypart are as follows (sources: Nation’s Restaurant News [March 2017] and The NPD Group):

**Morning Snacks**
1. Donuts/sweet rolls
2. Breakfast sandwiches
3. Bagels
4. Granola/cereal/energy bars
5. Muffins
6. Burgers
7. Cookies

**Afternoon Snacks**
1. Burgers
2. French fries
3. Ice cream
4. Donuts/sweet rolls
5. Potato chips
6. Candy/candy bars
7. Cookies
8. Chicken sandwiches

**Evening Snacks**
1. Ice cream
2. French fries
3. Candy/candy bars
4. Donuts/sweet rolls
5. Cookies
6. Pizza
7. Potato chips
PART V: CITY-BY-CITY ANALYSIS
28

DINING OUT

28.1 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.

28.2 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:

<table>
<thead>
<tr>
<th>City</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Akron, OH</td>
<td>14.6%</td>
</tr>
<tr>
<td>Albany-Schenectady, NY</td>
<td>6.2%</td>
</tr>
<tr>
<td>Albuquerque, NM</td>
<td>11.4%</td>
</tr>
<tr>
<td>Allentown-Bethlehem, PA</td>
<td>8.3%</td>
</tr>
<tr>
<td>Ann Arbor, MI</td>
<td>8.9%</td>
</tr>
<tr>
<td>Atlanta, GA</td>
<td>15.0%</td>
</tr>
<tr>
<td>Austin, TX</td>
<td>15.8%</td>
</tr>
<tr>
<td>Baltimore, MD</td>
<td>7.6%</td>
</tr>
<tr>
<td>Birmingham, AL</td>
<td>13.6%</td>
</tr>
<tr>
<td>Boise, ID</td>
<td>7.6%</td>
</tr>
<tr>
<td>Boston, MA</td>
<td>10.5%</td>
</tr>
<tr>
<td>Buffalo, NY</td>
<td>10.4%</td>
</tr>
<tr>
<td>Champaign, IL</td>
<td>14.9%</td>
</tr>
<tr>
<td>Charleston, SC</td>
<td>6.9%</td>
</tr>
<tr>
<td>Charleston/Huntington, WV</td>
<td>10.5%</td>
</tr>
<tr>
<td>Charlotte, NC</td>
<td>13.7%</td>
</tr>
<tr>
<td>Chicago, IL</td>
<td>12.7%</td>
</tr>
<tr>
<td>Cincinnati, OH</td>
<td>12.7%</td>
</tr>
<tr>
<td>Cleveland, OH</td>
<td>11.3%</td>
</tr>
<tr>
<td>Colorado Springs, CO</td>
<td>7.5%</td>
</tr>
<tr>
<td>Columbus, SC</td>
<td>16.0%</td>
</tr>
<tr>
<td>Columbia-Jefferson City, MO</td>
<td>11.0%</td>
</tr>
<tr>
<td>Columbus, OH</td>
<td>10.3%</td>
</tr>
<tr>
<td>Dallas-Ft. Worth, TX</td>
<td>16.0%</td>
</tr>
<tr>
<td>Dayton, OH</td>
<td>11.7%</td>
</tr>
<tr>
<td>Denver, CO</td>
<td>8.1%</td>
</tr>
<tr>
<td>Des Moines, IA</td>
<td>14.2%</td>
</tr>
<tr>
<td>Detroit, MI</td>
<td>12.5%</td>
</tr>
<tr>
<td>Eugene-Springfield, OR</td>
<td>7.9%</td>
</tr>
<tr>
<td>Ft. Myers-Naples, FL</td>
<td>17.9%</td>
</tr>
<tr>
<td>Grand Rapids, MI</td>
<td>8.3%</td>
</tr>
<tr>
<td>Greensboro, NC</td>
<td>17.5%</td>
</tr>
<tr>
<td>Greenville-Spartanburg, SC</td>
<td>16.4%</td>
</tr>
<tr>
<td>Houston, TX</td>
<td>11.6%</td>
</tr>
<tr>
<td>Indianapolis, IN</td>
<td>13.2%</td>
</tr>
<tr>
<td>Jacksonville, FL</td>
<td>10.3%</td>
</tr>
<tr>
<td>Kansas City, MO</td>
<td>10.2%</td>
</tr>
<tr>
<td>Las Vegas, NV</td>
<td>15.1%</td>
</tr>
<tr>
<td>Lexington, KY</td>
<td>13.0%</td>
</tr>
<tr>
<td>Little Rock, AR</td>
<td>10.1%</td>
</tr>
<tr>
<td>Los Angeles, CA</td>
<td>12.6%</td>
</tr>
<tr>
<td>Louisville, KY</td>
<td>11.2%</td>
</tr>
<tr>
<td>Madison, WI</td>
<td>9.2%</td>
</tr>
<tr>
<td>Melbourne-Cocoa, FL</td>
<td>16.0%</td>
</tr>
<tr>
<td>Memphis, TN</td>
<td>12.7%</td>
</tr>
<tr>
<td>Miami-Ft. Lauderdale, FL</td>
<td>13.3%</td>
</tr>
</tbody>
</table>
28.3 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:

<table>
<thead>
<tr>
<th>Metropolitan Area</th>
<th>Average Visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Akron, OH</td>
<td>2.35</td>
</tr>
<tr>
<td>Albany-Schenectady, NY</td>
<td>2.13</td>
</tr>
<tr>
<td>Albuquerque, NM</td>
<td>2.25</td>
</tr>
<tr>
<td>Allentown-Bethlehem, PA</td>
<td>1.64</td>
</tr>
<tr>
<td>Ann Arbor, MI</td>
<td>2.52</td>
</tr>
<tr>
<td>Atlanta, GA</td>
<td>3.11</td>
</tr>
<tr>
<td>Austin, TX</td>
<td>2.66</td>
</tr>
<tr>
<td>Baltimore, MD</td>
<td>2.58</td>
</tr>
<tr>
<td>Birmingham, AL</td>
<td>2.79</td>
</tr>
<tr>
<td>Boise, ID</td>
<td>2.15</td>
</tr>
<tr>
<td>Boston, MA</td>
<td>2.05</td>
</tr>
<tr>
<td>Buffalo, NY</td>
<td>1.78</td>
</tr>
<tr>
<td>Champaign, IL</td>
<td>1.98</td>
</tr>
<tr>
<td>Charleston, SC</td>
<td>2.36</td>
</tr>
<tr>
<td>Charleston/Huntington, WV</td>
<td>2.80</td>
</tr>
<tr>
<td>Charlotte, NC</td>
<td>2.78</td>
</tr>
<tr>
<td>Chicago, IL</td>
<td>2.68</td>
</tr>
<tr>
<td>Cincinnati, OH</td>
<td>2.66</td>
</tr>
<tr>
<td>Cleveland, OH</td>
<td>2.30</td>
</tr>
<tr>
<td>Colorado Springs, CO</td>
<td>2.29</td>
</tr>
<tr>
<td>Columbia, SC</td>
<td>2.56</td>
</tr>
<tr>
<td>Columbia-Jefferson City, MO</td>
<td>2.58</td>
</tr>
<tr>
<td>Columbus, OH</td>
<td>2.39</td>
</tr>
<tr>
<td>Dallas-Ft. Worth, TX</td>
<td>3.13</td>
</tr>
<tr>
<td>Dayton, OH</td>
<td>2.84</td>
</tr>
<tr>
<td>Denver, CO</td>
<td>2.38</td>
</tr>
<tr>
<td>Des Moines, IA</td>
<td>3.16</td>
</tr>
<tr>
<td>Detroit, MI</td>
<td>2.66</td>
</tr>
<tr>
<td>Eugene-Springfield, OR</td>
<td>2.39</td>
</tr>
<tr>
<td>Ft. Myers-Naples, FL</td>
<td>2.84</td>
</tr>
<tr>
<td>Grand Rapids, MI</td>
<td>2.13</td>
</tr>
<tr>
<td>Greensboro, NC</td>
<td>3.40</td>
</tr>
<tr>
<td>Greenville-Spartanburg, SC</td>
<td>2.82</td>
</tr>
<tr>
<td>Greenville, CA</td>
<td>2.05</td>
</tr>
<tr>
<td>Houston, TX</td>
<td>2.71</td>
</tr>
<tr>
<td>Indianapolis, IN</td>
<td>3.07</td>
</tr>
<tr>
<td>Jacksonville, FL</td>
<td>3.12</td>
</tr>
<tr>
<td>Milwaukee-Racine, WI</td>
<td>7.9%</td>
</tr>
<tr>
<td>Minneapolis-Saint Paul, MN</td>
<td>8.8%</td>
</tr>
<tr>
<td>Nashville, TN</td>
<td>13.8%</td>
</tr>
<tr>
<td>New Orleans, LA</td>
<td>13.7%</td>
</tr>
<tr>
<td>New York, NY</td>
<td>10.5%</td>
</tr>
<tr>
<td>Ocala, FL</td>
<td>15.5%</td>
</tr>
<tr>
<td>Oklahoma City, OK</td>
<td>14.8%</td>
</tr>
<tr>
<td>Omaha-Council Bluffs, NE</td>
<td>9.6%</td>
</tr>
<tr>
<td>Orange County, CA</td>
<td>13.3%</td>
</tr>
<tr>
<td>Orlando, FL</td>
<td>10.3%</td>
</tr>
<tr>
<td>Peoria, IL</td>
<td>10.0%</td>
</tr>
<tr>
<td>Philadelphia, PA</td>
<td>9.5%</td>
</tr>
<tr>
<td>Phoenix, AZ</td>
<td>11.4%</td>
</tr>
<tr>
<td>Pittsburgh, PA</td>
<td>9.0%</td>
</tr>
<tr>
<td>Portland, OR</td>
<td>10.5%</td>
</tr>
<tr>
<td>Raleigh-Durham, NC</td>
<td>11.9%</td>
</tr>
<tr>
<td>Reno, NV</td>
<td>9.8%</td>
</tr>
<tr>
<td>Richmond, VA</td>
<td>14.3%</td>
</tr>
<tr>
<td>Riverside-San Bernardino, CA</td>
<td>10.5%</td>
</tr>
<tr>
<td>Rochester, NY</td>
<td>6.6%</td>
</tr>
<tr>
<td>Sacramento, CA</td>
<td>7.4%</td>
</tr>
<tr>
<td>Salt Lake City, UT</td>
<td>8.0%</td>
</tr>
<tr>
<td>San Antonio, TX</td>
<td>12.8%</td>
</tr>
<tr>
<td>San Diego, CA</td>
<td>8.7%</td>
</tr>
<tr>
<td>San Francisco, CA</td>
<td>11.6%</td>
</tr>
<tr>
<td>San Jose, CA</td>
<td>12.2%</td>
</tr>
<tr>
<td>Seattle-Tacoma, WA</td>
<td>7.5%</td>
</tr>
<tr>
<td>Southern New Hampshire</td>
<td>7.4%</td>
</tr>
<tr>
<td>Spokane, WA</td>
<td>8.3%</td>
</tr>
<tr>
<td>Springfield, MO</td>
<td>20.2%</td>
</tr>
<tr>
<td>St. Louis, MO</td>
<td>11.6%</td>
</tr>
<tr>
<td>Syracuse, NY</td>
<td>7.1%</td>
</tr>
<tr>
<td>Tampa-St. Petersburg, FL</td>
<td>12.2%</td>
</tr>
<tr>
<td>Toledo, OH</td>
<td>8.8%</td>
</tr>
<tr>
<td>Tucson, AZ</td>
<td>10.3%</td>
</tr>
<tr>
<td>Tulsa, OK</td>
<td>16.2%</td>
</tr>
<tr>
<td>Washington, DC</td>
<td>13.0%</td>
</tr>
<tr>
<td>West Palm Beach, FL</td>
<td>14.6%</td>
</tr>
</tbody>
</table>
Kansas City, MO: 2.61  Portland, OR: 2.52
Las Vegas, NV: 2.60  Raleigh-Durham, NC: 3.18
Lexington, KY: 3.26  Reno, NV: 2.29
Little Rock, AR: 2.80  Richmond, VA: 2.82
Los Angeles, CA: 2.78  Riverside-San Bernardino, CA: 2.16
Louisville, KY: 3.15  Rochester, NY: 2.87
Madison, WI: 2.20  Sacramento, CA: 2.61
Melbourne-Cocoa, FL: 2.57  Salt Lake City, UT: 2.53
Memphis, TN: 2.91  San Antonio, TX: 2.82
Miami-Ft. Lauderdale, FL: 2.61  San Diego, CA: 2.64
Milwaukee-Racine, WI: 2.12  San Francisco, CA: 2.22
Minneapolis-Saint Paul, MN: 2.10  San Jose, CA: 2.46
Nashville, TN: 3.04  Seattle-Tacoma, WA: 2.40
New Orleans, LA: 2.19  Southern New Hampshire: 2.21
New York, NY: 2.61  Spokane, WA: 2.15
Ocala, FL: 2.02  Springfield, MO: 2.23
Oklahoma City, OK: 2.92  St. Louis, MO: 2.50
Omaha-Council Bluffs, NE: 2.83  Syracuse, NY: 2.23
Orange County, CA: 2.76  Tampa-St. Petersburg, FL: 2.48
Orlando, FL: 3.49  Toledo, OH: 2.25
Peoria, IL: 2.31  Tucson, AZ: 2.53
Philadelphia, PA: 2.37  Tulsa, OK: 3.43
Phoenix, AZ: 2.83  Washington, DC: 2.48
Pittsburgh, PA: 2.09  West Palm Beach, FL: 2.21

28.4 Market Resources
International Demographics, 10333 Richmond Avenue, Suite 200, Houston, TX 77042.
(713) 626-0333. (www.themediaaudit.com)
### RESTAURANT SALES

#### 29.1 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.

#### 29.2 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):

<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>
<tr>
<td>• Aberdeen, SD:</td>
<td>$1,997</td>
<td>6.55%</td>
<td>132</td>
</tr>
<tr>
<td>• Aberdeen, WA:</td>
<td>$1,386</td>
<td>6.29%</td>
<td>217</td>
</tr>
<tr>
<td>• Abilene, TX:</td>
<td>$1,757</td>
<td>7.56%</td>
<td>414</td>
</tr>
<tr>
<td>• Ada, OK:</td>
<td>$1,743</td>
<td>7.61%</td>
<td>123</td>
</tr>
<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>• Alamogordo, NM:</td>
<td>$1,746</td>
<td>7.95%</td>
<td>183</td>
</tr>
<tr>
<td>• Albany, GA:</td>
<td>$1,715</td>
<td>8.36%</td>
<td>342</td>
</tr>
<tr>
<td>• Albany, OR:</td>
<td>$1,126</td>
<td>5.54%</td>
<td>235</td>
</tr>
<tr>
<td>• Albany-Schenectady-Troy, NY:</td>
<td>$2,253</td>
<td>6.86%</td>
<td>2,226</td>
</tr>
<tr>
<td>• Albermarle, NC:</td>
<td>$1,519</td>
<td>7.61%</td>
<td>137</td>
</tr>
<tr>
<td>• Albert Lea, MN:</td>
<td>$1,950</td>
<td>7.19%</td>
<td>93</td>
</tr>
<tr>
<td>• Albertville, AL:</td>
<td>$1,378</td>
<td>6.50%</td>
<td>197</td>
</tr>
<tr>
<td>• Albuquerque, NM:</td>
<td>$1,811</td>
<td>7.05%</td>
<td>1,904</td>
</tr>
<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>
</tr>
<tr>
<td>• Alice, TX:</td>
<td>$1,524</td>
<td>6.66%</td>
<td>104</td>
</tr>
<tr>
<td>• Allentown-Bethlehem, PA-NJ:</td>
<td>$1,426</td>
<td>5.09%</td>
<td>1,842</td>
</tr>
<tr>
<td>Location</td>
<td>Revenue</td>
<td>Growth Rate</td>
<td>Change</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>---------</td>
<td>-------------</td>
<td>--------</td>
</tr>
<tr>
<td>Alma, MI</td>
<td>$924</td>
<td>4.79%</td>
<td>72</td>
</tr>
<tr>
<td>Alpena, MI</td>
<td>$3,074</td>
<td>13.21%</td>
<td>187</td>
</tr>
<tr>
<td>Altoona, PA</td>
<td>$1,913</td>
<td>8.06%</td>
<td>296</td>
</tr>
<tr>
<td>Altus, OK</td>
<td>$2,155</td>
<td>9.50%</td>
<td>130</td>
</tr>
<tr>
<td>Amarillo, TX</td>
<td>$1,833</td>
<td>7.48%</td>
<td>640</td>
</tr>
<tr>
<td>Americus, GA</td>
<td>$1,247</td>
<td>6.55%</td>
<td>75</td>
</tr>
<tr>
<td>Ames, IA</td>
<td>$1,580</td>
<td>6.31%</td>
<td>193</td>
</tr>
<tr>
<td>Amsterdam, NY</td>
<td>$1,331</td>
<td>5.62%</td>
<td>101</td>
</tr>
<tr>
<td>Anchorage, AK</td>
<td>$2,824</td>
<td>7.88%</td>
<td>1,272</td>
</tr>
<tr>
<td>Andrews, TX</td>
<td>$2,160</td>
<td>7.19%</td>
<td>66</td>
</tr>
<tr>
<td>Angola, IN</td>
<td>$2,036</td>
<td>8.17%</td>
<td>103</td>
</tr>
<tr>
<td>Ann Arbor, MI</td>
<td>$1,741</td>
<td>5.26%</td>
<td>847</td>
</tr>
<tr>
<td>Anniston-Jacksonville, AL</td>
<td>$1,717</td>
<td>8.24%</td>
<td>231</td>
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<tr>
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<td>Barre, VT</td>
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</table>
• Bartlesville, OK: $1,253 4.21% 102 $ 634,196
• Bastrop, LA: $2,338 13.28% 97 $ 641,485
• Batavia, NY: $2,502 9.58% 143 $1,031,881
• Batesville, AR: $1,569 8.64% 121 $ 480,727
• Baton Rouge, LA: $1,718 6.37% 1,593 $ 893,370
• Battle Creek, MI: $1,392 6.55% 241 $ 778,149
• Bay City, MI: $2,595 11.06% 368 $ 751,207
• Bay City, TX: $1,343 5.59% 85 $ 586,588
• Beatrice, NE: $2,249 8.20% 120 $ 720,753
• Beaumont-Port Arthur, TX: $1,708 7.29% 880 $ 794,107
• Beaver Dam, WI: $738 3.01% 123 $ 528,260
• Beckley, WV: $2,049 9.20% 352 $ 720,753
• Bedford, IN: $1,279 5.41% 66 $ 883,924
• Beeville, TX: $1,884 11.61% 113 $ 552,186
• Bellefontaine, OH: $1,312 5.41% 121 $ 492,380
• Bellingham, WA: $1,595 5.85% 511 $ 655,830
• Bemidji, MN: $2,124 8.95% 135 $ 729,830
• Bend-Redmond, OR: $1,707 6.69% 428 $ 670,028
• Bennettsville, SC: $1,924 12.24% 90 $ 591,411
• Bennington, VT: $2,071 6.86% 146 $ 518,315
• Berlin, NH-VT: $5,225 22.23% 314 $ 628,268
• Big Rapids, MI: $2,019 9.96% 121 $ 718,306
• Big Stone Gap, VA: $3,515 17.78% 322 $ 649,193
• Billings, MT: $2,558 9.33% 609 $ 708,524
• Binghamton, NY: $2,336 8.76% 684 $ 839,991
• Birmingham-Hoover, AL: $1,408 5.49% 2,366 $ 682,485
• Bismarck, ND: $1,610 4.62% 284 $ 730,521
• Blackfoot, ID: $761 3.65% 64 $ 535,453
• Blacksburg, VA: $2,344 9.78% 490 $ 873,355
• Bloomington, IL: $2,422 7.76% 392 $1,197,796
• Bloomington, IN: $2,059 8.88% 323 $1,046,495
• Bloomsburg-Berwick, PA: $1,497 5.70% 171 $ 746,503
• Bluefield, WV-VA: $1,853 8.59% 259 $ 756,398
• Blytheville, AR: $1,112 5.38% 103 $ 472,942
• Bogalusa, LA: $957 5.39% 73 $ 602,753
• Boise City, ID: $1,355 5.89% 1,318 $ 685,913
• Boone, IA: $855 3.01% 44 $ 513,773
• Boone, NC: $3,638 17.30% 231 $ 840,619
• Borger, TX: $1,334 4.88% 54 $ 545,500
• Boston-Cambridge, MA-NH: $2,028 5.18% 11,947 $ 805,043
• Boulder, CO: $2,231 5.63% 895 $ 791,415
• Bowling Green, KY: $2,079 10.05% 374 $ 921,305
• Bozeman, MT: $2,481 7.88% 355 $ 680,549
<table>
<thead>
<tr>
<th>Location</th>
<th>Average Market Price</th>
<th>Average Market Share (%)</th>
<th>Number of Restaurants</th>
<th>Average Annual Revenue</th>
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<td>$456,523</td>
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<td>$681,753</td>
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<td>Population</td>
<td>Percentage</td>
<td>Revenue</td>
<td>Sales Per Capita</td>
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<tr>
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<td>Columbus, OH</td>
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<td>Concord, NH</td>
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<td>Cuyahoga, OH</td>
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<td>Cookeville, TN</td>
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<td>Coos Bay, OR</td>
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<td>5.64%</td>
<td>$483,857</td>
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<td>Cordele, GA</td>
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<td>Corinth, MS</td>
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<td>Cornelia, GA</td>
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<td>990</td>
<td>6.70%</td>
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</table>

İMPORTANT: This table represents sales per capita for various cities across the United States, with the percentage of population and revenue figures. The data is for the year 2018-2019.
<table>
<thead>
<tr>
<th>City</th>
<th>Yearly Sales</th>
<th>Revenue Growth</th>
<th>Restaurants</th>
<th>Sales Volume</th>
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<tbody>
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<td>Corsicana, TX</td>
<td>$1,547</td>
<td>7.29%</td>
<td>127</td>
<td>$593,213</td>
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<tr>
<td>Cortland, NY</td>
<td>$2,008</td>
<td>8.12%</td>
<td>115</td>
<td>$849,296</td>
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<tr>
<td>Corvallis, OR</td>
<td>$1,553</td>
<td>5.51%</td>
<td>203</td>
<td>$673,246</td>
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<tr>
<td>Coshocton, OH</td>
<td>$1,469</td>
<td>6.62%</td>
<td>85</td>
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• Dunn, NC:  
  $957  4.63%  
  188  $653,027
• Durango, CO:  
  $3,209  10.22%  
  279  $623,036
• Durant, OK:  
  $2,120  9.92%  
  195  $490,995
• Durham-Chapel Hill, NC:  
  $1,682  5.54%  
  1,191  $768,870
• Dyersburg, TN:  
  $1,732  7.57%  
  101  $654,564
• Eagle Pass, TX:  
  $1,476  10.47%  
  142  $593,725
• East Stroudsburg, PA:  
  $1,472  5.76%  
  279  $608,575
• Easton, MD:  
  $3,768  10.18%  
  142  $1,005,183
• Eau Claire, WI:  
  $1,929  7.61%  
  490  $653,080
• Edwards, CO:  
  $3,644  10.04%  
  250  $764,808
• Effingham, IL:  
  $4,365  15.15%  
  136  $1,101,346
• El Campo, TX:  
  $1,642  7.49%  
  137  $497,942
• El Centro, CA:  
  $1,313  8.26%  
  257  $917,148
• El Dorado, AR:  
  $1,238  5.37%  
  109  $457,073
• El Paso, TX:  
  $1,520  7.87%  
  1,546  $841,124
• Elizabeth City, NC:  
  $1,589  6.51%  
  134  $754,858
• Elizabethtown-Fort Knox, KY:  
  $1,594  6.67%  
  302  $804,901
• Elk City, OK:  
  $1,959  6.88%  
  97  $492,938
• Elkhart-Goshen, IN:  
  $1,553  7.70%  
  402  $780,896
• Elkins, WV:  
  $2,475  11.70%  
  158  $460,867
• Elko, NV:  
  $1,962  6.35%  
  109  $1,023,404
• Ellensburg, WA:  
  $2,241  9.65%  
  142  $671,542
• Elmira, NY:  
  $2,736  10.65%  
  212  $1,135,764
• Emporia, KS:  
  $1,975  9.48%  
  121  $545,355
• Enid, OK:  
  $1,705  6.61%  
  203  $532,887
• Enterprise, AL:  
  $1,860  7.50%  
  159  $596,774
• Erie, PA:  
  $1,609  6.52%  
  537  $838,024
• Escanaba, MI:  
  $1,787  8.06%  
  115  $572,904
• Espanola, NM:  
  $1,989  9.34%  
  134  $591,604
• Eugene, OR:  
  $1,687  7.10%  
  935  $647,786
• Eureka-Arcata-Fortuna, CA:  
  $1,733  7.08%  
  366  $639,077
• Evanston, WY:  
  $1,997  7.46%  
  75  $561,747
• Evansville, IN-KY:  
  $2,011  7.77%  
  741  $856,431
• Fairbanks, AK:  
  $2,169  6.82%  
  268  $815,131
• Fairfield, IA:  
  $1,373  5.15%  
  62  $372,258
• Fairmont, WV:  
  $1,092  4.25%  
  118  $527,415
• Fallon, NV:  
  $2,181  8.21%  
  58  $924,190
• Fargo, ND-MN:  
  $1,760  5.53%  
  485  $843,004
• Faribault-Northfield, MN:  
  $1,099  4.12%  
  98  $734,959
• Farmington, MO:  
  $1,899  10.85%  
  188  $673,543
• Farmington, NM:  
  $1,418  6.13%  
  206  $858,034
• Fayetteville, AR-MO:  
  $1,481  5.88%  
  1,187  $630,534
• Fayetteville, NC:  
  $1,666  7.31%  
  781  $829,496
• Fergus Falls, MN:  
  $2,584  8.63%  
  221  $674,421
<table>
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<tr>
<th>City</th>
<th>Total Revenue</th>
<th>Sales Growth %</th>
<th>2018 Sales</th>
<th>2019 Sales</th>
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<td>Change</td>
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• Hobbs, NM: $1,429  5.58%  181 $  554,630
• Holland, MI: $1,160  4.81%  194 $  677,201
• Homosassa Springs, FL: $1,325  5.57%  263 $  706,190
• Honolulu (Urban), HI: $3,265  10.84%   2,408 $1,351,022
• Hood River, OR: $2,581  8.99%  98 $   613,837
• Hot Springs, AR: $1,619  6.26%  294 $   537,486
• Houghton, MI: $2,732  13.30%  194 $   536,402
• Houma-Thibodaux, LA: $1,716  7.06%  405 $   894,005
• Houston-The Woodlands, TX: $1,557  5.37%  13,191 $  763,333
• Hudson, NY: $2,259  7.02%  233 $   600,107
• Huntingdon, PA: $1,728  7.96%  115 $   683,443
• Huntington, IN: $1,303  5.80%  70 $   680,357
• Huntington-Ashland, WV-KY-OH: $1,771  7.33%  928 $  693,449
• Huntsville, AL: $1,654  5.33%  947 $   775,072
• Huntsville, TX: $2,274  12.00%  274 $  699,843
• Huron, SD: $1,896  7.03%  68 $   512,618
• Hutchinson, KS: $1,569  6.51%  147 $   683,667
• Hutchinson, MN: $1,917  7.20%  80 $   853,213
• Idaho Falls, ID: $1,473  6.31%  267 $   764,360
• Indiana, PA: $1,498  6.37%  186 $   701,849
• Indianapolis-Carmel, IN: $1,784  6.45%  3,955 $  896,547
• Indianola, MS: $  935  6.59%  44 $   582,386
• Ionia, MI: $  776  3.86%  83 $   600,506
• Iowa City, IA: $1,915  6.34%  421 $   751,810
• Iron Mountain, MI-WI: $1,917  7.36%  123 $   476,106
• Ithaca, NY: $2,234  7.34%  234 $  1,000,316
• Jackson, MS: $2,133  8.68%  1,360 $  906,819
• Jackson, MI: $1,254  5.80%  272 $   740,254
• Jackson, OH: $1,389  6.70%  84 $   538,452
• Jackson, TN: $3,048  12.90%  575 $  694,917
• Jackson, WY-ID: $3,709  10.67%  307 $  937,189
• Jacksonville, FL: $2,079  7.89%  3,317 $  888,233
• Jacksonville, IL: $2,541  9.75%  130 $   779,846
• Jacksonville, NC: $1,480  7.69%  343 $   844,583
• Jacksonville, TX: $1,311  7.04%  84 $   807,524
• Jamestown, ND: $1,896  6.14%  95 $   424,484
• Jamestown-Fredonia, NY: $2,312  10.06%  307 $  996,430
• Janesville-Beloit, WI: $1,387  5.91%  323 $  692,074
• Jasper, IN: $1,838  7.24%  155 $   654,168
• Jefferson, GA: $1,979  9.06%  137 $   888,474
• Jefferson City, MO: $1,935  8.08%  407 $   716,224
• Jesup, GA: $1,171  6.40%  60 $   582,533
• Johnson City, TN: $1,818  7.68%  454 $  808,163
• Johnstown, PA: $1,369  5.84%  279 $  681,935
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<th>City</th>
<th>DOI</th>
<th>Food Sales Growth</th>
<th>Restaurants</th>
<th>Population</th>
<th>Sales</th>
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<td>Population</td>
<td>Total Market</td>
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RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019
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<td>59,299</td>
<td>$ 682,227</td>
</tr>
<tr>
<td>Newberry, SC</td>
<td>$1,119</td>
<td>5.14%</td>
<td>66</td>
<td>$ 635,485</td>
</tr>
<tr>
<td>Newport, OR</td>
<td>$2,564</td>
<td>9.83%</td>
<td>231</td>
<td>$ 519,662</td>
</tr>
<tr>
<td>Newport, TN</td>
<td>$1,213</td>
<td>6.81%</td>
<td>64</td>
<td>$ 670,625</td>
</tr>
<tr>
<td>Newton, IA</td>
<td>$1,662</td>
<td>6.44%</td>
<td>103</td>
<td>$ 591,078</td>
</tr>
<tr>
<td>Niles-Benton Harbor, MI</td>
<td>$1,492</td>
<td>6.35%</td>
<td>342</td>
<td>$ 673,187</td>
</tr>
<tr>
<td>Nogales, AZ</td>
<td>$1,091</td>
<td>5.77%</td>
<td>88</td>
<td>$ 573,966</td>
</tr>
<tr>
<td>Norfolk, NE</td>
<td>$1,820</td>
<td>6.84%</td>
<td>151</td>
<td>$ 587,099</td>
</tr>
<tr>
<td>North Platte, NE</td>
<td>$2,453</td>
<td>9.40%</td>
<td>170</td>
<td>$ 538,588</td>
</tr>
<tr>
<td>North Port-Sarasota, FL</td>
<td>$2,067</td>
<td>6.91%</td>
<td>1,773</td>
<td>$ 871,099</td>
</tr>
<tr>
<td>North Vernon, IN</td>
<td>$ 686</td>
<td>2.97%</td>
<td>37</td>
<td>$ 523,595</td>
</tr>
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<td>North Wilkesboro, NC</td>
<td>$1,814</td>
<td>9.29%</td>
<td>180</td>
<td>$ 698,839</td>
</tr>
<tr>
<td>Norwalk, OH</td>
<td>$1,002</td>
<td>4.17%</td>
<td>91</td>
<td>$ 643,132</td>
</tr>
<tr>
<td>Norwich-New London, CT</td>
<td>$2,313</td>
<td>6.87%</td>
<td>696</td>
<td>$ 910,466</td>
</tr>
<tr>
<td>Oak Harbor, WA</td>
<td>$1,526</td>
<td>4.75%</td>
<td>212</td>
<td>$ 576,613</td>
</tr>
<tr>
<td>Ocala, FL</td>
<td>$1,544</td>
<td>7.41%</td>
<td>580</td>
<td>$ 909,398</td>
</tr>
<tr>
<td>Ocean City, NJ</td>
<td>$5,804</td>
<td>17.63%</td>
<td>634</td>
<td>$ 871,754</td>
</tr>
<tr>
<td>Odessa, TX</td>
<td>$1,822</td>
<td>7.40%</td>
<td>355</td>
<td>$ 787,169</td>
</tr>
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<td>Ogden-Clearfield, UT</td>
<td>$1,104</td>
<td>4.45%</td>
<td>909</td>
<td>$ 769,608</td>
</tr>
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<td>Ogdensburg-Massena, NY</td>
<td>$1,407</td>
<td>6.45%</td>
<td>203</td>
<td>$ 773,921</td>
</tr>
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<td>Oil City, PA</td>
<td>$2,255</td>
<td>10.18%</td>
<td>177</td>
<td>$ 679,548</td>
</tr>
<tr>
<td>Okeechobee, FL</td>
<td>$1,645</td>
<td>10.21%</td>
<td>76</td>
<td>$ 856,368</td>
</tr>
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<td>Oklahoma City, OK</td>
<td>$1,565</td>
<td>5.82%</td>
<td>2,949</td>
<td>$ 717,113</td>
</tr>
<tr>
<td>Olean, NY</td>
<td>$2,310</td>
<td>10.07%</td>
<td>192</td>
<td>$ 941,547</td>
</tr>
<tr>
<td>Olympia-Tumwater, WA</td>
<td>$1,558</td>
<td>5.33%</td>
<td>571</td>
<td>$ 731,002</td>
</tr>
<tr>
<td>Omaha-Council Bluffs, NE-IA</td>
<td>$1,551</td>
<td>5.36%</td>
<td>1,957</td>
<td>$ 720,398</td>
</tr>
<tr>
<td>Oneonta, NY</td>
<td>$3,626</td>
<td>14.06%</td>
<td>304</td>
<td>$ 732,095</td>
</tr>
<tr>
<td>Ontario, OR-ID</td>
<td>$1,318</td>
<td>7.13%</td>
<td>141</td>
<td>$ 500,113</td>
</tr>
<tr>
<td>Opelousas, LA</td>
<td>$1,289</td>
<td>6.05%</td>
<td>166</td>
<td>$ 647,783</td>
</tr>
<tr>
<td>Orangeburg, SC</td>
<td>$1,705</td>
<td>9.91%</td>
<td>221</td>
<td>$ 696,267</td>
</tr>
<tr>
<td>Orlando-Kissimmee-Sanford, FL</td>
<td>$2,465</td>
<td>10.53%</td>
<td>5,351</td>
<td>$1,072,766</td>
</tr>
<tr>
<td>Oshkosh-Neenah, WI</td>
<td>$1,409</td>
<td>5.12%</td>
<td>341</td>
<td>$ 705,548</td>
</tr>
<tr>
<td>Oskaloosa, IA</td>
<td>$2,613</td>
<td>10.60%</td>
<td>101</td>
<td>$ 579,059</td>
</tr>
<tr>
<td>Othello, WA</td>
<td>$1,263</td>
<td>7.78%</td>
<td>44</td>
<td>$ 559,864</td>
</tr>
<tr>
<td>Ottawa, KS</td>
<td>$1,321</td>
<td>5.57%</td>
<td>61</td>
<td>$ 554,689</td>
</tr>
<tr>
<td>Ottawa-Peru, IL</td>
<td>$1,811</td>
<td>6.99%</td>
<td>419</td>
<td>$ 650,587</td>
</tr>
<tr>
<td>Ottumwa, IA</td>
<td>$1,720</td>
<td>7.66%</td>
<td>138</td>
<td>$ 550,551</td>
</tr>
<tr>
<td>Owatonna, MN</td>
<td>$2,224</td>
<td>7.87%</td>
<td>91</td>
<td>$ 886,956</td>
</tr>
<tr>
<td>Owensboro, KY</td>
<td>$1,873</td>
<td>7.83%</td>
<td>300</td>
<td>$ 731,547</td>
</tr>
<tr>
<td>Owosso, MI</td>
<td>$ 943</td>
<td>4.16%</td>
<td>103</td>
<td>$ 623,553</td>
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<tr>
<td>Oxford, MS</td>
<td>$3,472</td>
<td>13.14%</td>
<td>184</td>
<td>$1,000,641</td>
</tr>
<tr>
<td>City</td>
<td>Average Sales</td>
<td>Growth Rate</td>
<td>Sales in 2017</td>
<td>Sales in 2018</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>---------------</td>
<td>-------------</td>
<td>----------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Oxford, NC</td>
<td>$895</td>
<td>3.82%</td>
<td>$85</td>
<td>$630,212</td>
</tr>
<tr>
<td>Oxnard-Th. Oaks-Ventura, CA</td>
<td>$1,781</td>
<td>5.68%</td>
<td>$1,785</td>
<td>$847,848</td>
</tr>
<tr>
<td>Ozark, AL</td>
<td>$1,079</td>
<td>4.67%</td>
<td>$96</td>
<td>$556,771</td>
</tr>
<tr>
<td>Paducah, KY-IL</td>
<td>$2,818</td>
<td>11.23%</td>
<td>$360</td>
<td>$763,792</td>
</tr>
<tr>
<td>Pahrump, NV</td>
<td>$1,985</td>
<td>9.15%</td>
<td>$88</td>
<td>$975,625</td>
</tr>
<tr>
<td>Palestine, TX</td>
<td>$1,391</td>
<td>7.38%</td>
<td>$117</td>
<td>$831,727</td>
</tr>
<tr>
<td>Palm Bay-Melbourne, FL</td>
<td>$1,931</td>
<td>7.23%</td>
<td>$1,215</td>
<td>$886,188</td>
</tr>
<tr>
<td>Pampa, TX</td>
<td>$1,514</td>
<td>7.02%</td>
<td>$67</td>
<td>$526,493</td>
</tr>
<tr>
<td>Panama City, FL</td>
<td>$3,495</td>
<td>14.36%</td>
<td>$759</td>
<td>$889,962</td>
</tr>
<tr>
<td>Paragould, AR</td>
<td>$1,532</td>
<td>7.49%</td>
<td>$121</td>
<td>$548,083</td>
</tr>
<tr>
<td>Paris, TN</td>
<td>$1,871</td>
<td>8.33%</td>
<td>$128</td>
<td>$469,125</td>
</tr>
<tr>
<td>Paris, TX</td>
<td>$1,853</td>
<td>7.86%</td>
<td>$157</td>
<td>$591,433</td>
</tr>
<tr>
<td>Parkersburg-Vienna, WV</td>
<td>$2,006</td>
<td>8.51%</td>
<td>$266</td>
<td>$696,361</td>
</tr>
<tr>
<td>Parsons, KS</td>
<td>$1,486</td>
<td>7.09%</td>
<td>$57</td>
<td>$535,386</td>
</tr>
<tr>
<td>Payson, AZ</td>
<td>$1,579</td>
<td>7.69%</td>
<td>$116</td>
<td>$719,155</td>
</tr>
<tr>
<td>Pecos, TX</td>
<td>$4,168</td>
<td>25.55%</td>
<td>$113</td>
<td>$519,407</td>
</tr>
<tr>
<td>Pensacola-Ferry Pass-Brent, FL</td>
<td>$2,035</td>
<td>8.08%</td>
<td>$1,003</td>
<td>$962,154</td>
</tr>
<tr>
<td>Peoria, IL</td>
<td>$1,929</td>
<td>6.70%</td>
<td>$832</td>
<td>$889,871</td>
</tr>
<tr>
<td>Peru, IN</td>
<td>$1,663</td>
<td>8.01%</td>
<td>$92</td>
<td>$645,946</td>
</tr>
<tr>
<td>Philadelphia, PA-NJ-DE-MD</td>
<td>$1,628</td>
<td>5.07%</td>
<td>$14,317</td>
<td>$689,053</td>
</tr>
<tr>
<td>Phoenix-Mesa-Scottsdale, AZ</td>
<td>$1,689</td>
<td>6.71%</td>
<td>$8,271</td>
<td>$919,301</td>
</tr>
<tr>
<td>Picayune, MS</td>
<td>$1,159</td>
<td>5.67%</td>
<td>$72</td>
<td>$880,819</td>
</tr>
<tr>
<td>Pierre, SD</td>
<td>$2,736</td>
<td>8.00%</td>
<td>$104</td>
<td>$581,516</td>
</tr>
<tr>
<td>Pine Bluff, AR</td>
<td>$1,291</td>
<td>6.51%</td>
<td>$234</td>
<td>$515,938</td>
</tr>
<tr>
<td>Pinehurst-Southern Pines, NC</td>
<td>$1,795</td>
<td>5.80%</td>
<td>$250</td>
<td>$667,028</td>
</tr>
<tr>
<td>Pittsburg, KS</td>
<td>$2,457</td>
<td>11.73%</td>
<td>$154</td>
<td>$627,058</td>
</tr>
<tr>
<td>Pittsburgh, PA</td>
<td>$1,864</td>
<td>6.02%</td>
<td>$5,797</td>
<td>$759,206</td>
</tr>
<tr>
<td>Pittsfield, MA</td>
<td>$2,179</td>
<td>7.84%</td>
<td>$436</td>
<td>$643,663</td>
</tr>
<tr>
<td>Plainview, TX</td>
<td>$1,567</td>
<td>8.59%</td>
<td>$88</td>
<td>$644,386</td>
</tr>
<tr>
<td>Platteville, WI</td>
<td>$1,697</td>
<td>7.37%</td>
<td>$181</td>
<td>$478,359</td>
</tr>
<tr>
<td>Plattsburgh, NY</td>
<td>$2,500</td>
<td>9.52%</td>
<td>$206</td>
<td>$988,049</td>
</tr>
<tr>
<td>Plymouth, IN</td>
<td>$1,550</td>
<td>7.17%</td>
<td>$98</td>
<td>$746,133</td>
</tr>
<tr>
<td>Pocatello, ID</td>
<td>$1,458</td>
<td>7.25%</td>
<td>$164</td>
<td>$737,909</td>
</tr>
<tr>
<td>Point Pleasant, WV-OH</td>
<td>$1,806</td>
<td>8.42%</td>
<td>$173</td>
<td>$598,977</td>
</tr>
<tr>
<td>Ponca City, OK</td>
<td>$1,281</td>
<td>5.65%</td>
<td>$106</td>
<td>$547,783</td>
</tr>
<tr>
<td>Pontiac, IL</td>
<td>$1,366</td>
<td>5.45%</td>
<td>$71</td>
<td>$726,155</td>
</tr>
<tr>
<td>Poplar Bluff, MO</td>
<td>$2,393</td>
<td>12.10%</td>
<td>$158</td>
<td>$653,038</td>
</tr>
<tr>
<td>Port Angeles, WA</td>
<td>$1,605</td>
<td>6.19%</td>
<td>$198</td>
<td>$595,045</td>
</tr>
<tr>
<td>Port Clinton, OH</td>
<td>$1,713</td>
<td>5.66%</td>
<td>$129</td>
<td>$543,535</td>
</tr>
<tr>
<td>Port Lavaca, TX</td>
<td>$1,312</td>
<td>5.12%</td>
<td>$66</td>
<td>$439,470</td>
</tr>
<tr>
<td>Port St. Lucie, FL</td>
<td>$1,687</td>
<td>6.49%</td>
<td>$911</td>
<td>$822,148</td>
</tr>
<tr>
<td>Portales, NM</td>
<td>$1,946</td>
<td>9.72%</td>
<td>$49</td>
<td>$780,918</td>
</tr>
<tr>
<td>Portland-South Portland, ME</td>
<td>$2,321</td>
<td>7.31%</td>
<td>$1,666</td>
<td>$728,138</td>
</tr>
<tr>
<td>Location</td>
<td>Current Spend</td>
<td>Change %</td>
<td>Increase</td>
<td>Previous Spend</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>---------------</td>
<td>-----------</td>
<td>----------</td>
<td>----------------</td>
</tr>
<tr>
<td>Portland-Vancouver, OR-WA</td>
<td>$1,715</td>
<td>5.72%</td>
<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>
</tr>
<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>
</tr>
<tr>
<td>Pullman, WA</td>
<td>$1,432</td>
<td>6.30%</td>
<td>96</td>
<td>$706,406</td>
</tr>
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<td>Punta Gorda, FL</td>
<td>$1,831</td>
<td>7.03%</td>
<td>351</td>
<td>$877,476</td>
</tr>
<tr>
<td>Quincy, IL-MO</td>
<td>$2,029</td>
<td>8.12%</td>
<td>166</td>
<td>$942,988</td>
</tr>
<tr>
<td>Racine, WI</td>
<td>$1,042</td>
<td>4.05%</td>
<td>306</td>
<td>$664,477</td>
</tr>
<tr>
<td>Raleigh, NC</td>
<td>$1,686</td>
<td>5.39%</td>
<td>2,522</td>
<td>$830,843</td>
</tr>
<tr>
<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>
</tr>
<tr>
<td>Red Bluff, CA</td>
<td>$1,555</td>
<td>7.62%</td>
<td>146</td>
<td>$674,349</td>
</tr>
<tr>
<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>
<tr>
<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>
<tr>
<td>Riverton, WY</td>
<td>$2,157</td>
<td>8.42%</td>
<td>146</td>
<td>$608,390</td>
</tr>
<tr>
<td>Roanoke Rapids, NC</td>
<td>$1,765</td>
<td>9.36%</td>
<td>200</td>
<td>$652,115</td>
</tr>
<tr>
<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>
<tr>
<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>
</tr>
<tr>
<td>Rock Springs, WY</td>
<td>$2,385</td>
<td>7.63%</td>
<td>138</td>
<td>$791,261</td>
</tr>
<tr>
<td>Rockford, IL</td>
<td>$1,829</td>
<td>7.16%</td>
<td>657</td>
<td>$953,376</td>
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<td>Rockingham, NC</td>
<td>$1,460</td>
<td>8.03%</td>
<td>94</td>
<td>$717,660</td>
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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>
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<td>12.61%</td>
<td>173</td>
<td>$696,775</td>
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<td>Rome, GA</td>
<td>$1,722</td>
<td>8.74%</td>
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<td>$798,864</td>
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<td>Roseburg, OR</td>
<td>$1,351</td>
<td>6.35%</td>
<td>269</td>
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<td>Roswell, NM</td>
<td>$1,296</td>
<td>5.92%</td>
<td>117</td>
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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>
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<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>
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<td>Value</td>
<td>Change</td>
<td>Population</td>
<td>Footprint</td>
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<td>---------</td>
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<tr>
<td>Sacramento--Roseville, CA</td>
<td>$1,780</td>
<td>6.38%</td>
<td>4,646</td>
<td>$859,200</td>
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<td>Safford, AZ</td>
<td>$1,153</td>
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<td>Saginaw, MI</td>
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<td>7.18%</td>
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<td>$815,530</td>
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<td>Salem, OH</td>
<td>$952</td>
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<td>168</td>
<td>$595,042</td>
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<td>Salem, OR</td>
<td>$1,186</td>
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<td>789</td>
<td>$609,380</td>
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<td>Salina, KS</td>
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<td>219</td>
<td>$644,808</td>
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<td>Salinas, CA</td>
<td>$1,874</td>
<td>7.87%</td>
<td>978</td>
<td>$829,101</td>
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<tr>
<td>Salsbury, MD-DE</td>
<td>$3,570</td>
<td>13.00%</td>
<td>1,365</td>
<td>$1,022,064</td>
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<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>
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<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>
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<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>
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<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>
</tr>
<tr>
<td>Santa Rosa, CA</td>
<td>$1,879</td>
<td>5.71%</td>
<td>1,265</td>
<td>$742,348</td>
</tr>
<tr>
<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>
<td>$1,340</td>
<td>4.96%</td>
<td>149</td>
<td>$556,215</td>
</tr>
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<td>Scottsbluff, NE</td>
<td>$2,532</td>
<td>10.28%</td>
<td>207</td>
<td>$475,314</td>
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<td>Scottsboro, AL</td>
<td>$1,800</td>
<td>8.00%</td>
<td>147</td>
<td>$646,327</td>
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<td>Scranton--Wilkes-Barre, PA</td>
<td>$1,931</td>
<td>7.63%</td>
<td>1,806</td>
<td>$598,936</td>
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<tr>
<td>Searcy, AR</td>
<td>$1,535</td>
<td>6.90%</td>
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<td>$586,583</td>
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<tr>
<td>Seattle-Tacoma-Bellevue, WA</td>
<td>$1,773</td>
<td>4.98%</td>
<td>9,730</td>
<td>$667,321</td>
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<td>Sebastian-Vero Beach, FL</td>
<td>$1,951</td>
<td>7.03%</td>
<td>339</td>
<td>$827,566</td>
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<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>
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<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>
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<td>Seneca, SC</td>
<td>$1,192</td>
<td>5.07%</td>
<td>168</td>
<td>$535,923</td>
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<tr>
<td>Sevierville, TN</td>
<td>$4,215</td>
<td>19.92%</td>
<td>417</td>
<td>$962,911</td>
</tr>
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<td>Seymour, IN</td>
<td>$1,499</td>
<td>6.57%</td>
<td>84</td>
<td>$784,631</td>
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<tr>
<td>Shawano, WI</td>
<td>$1,012</td>
<td>4.43%</td>
<td>91</td>
<td>$510,110</td>
</tr>
<tr>
<td>Shawnee, OK</td>
<td>$1,570</td>
<td>7.04%</td>
<td>169</td>
<td>$667,580</td>
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<tr>
<td>Sheboygan, WI</td>
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<td>5.40%</td>
<td>250</td>
<td>$665,140</td>
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<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>Location</td>
<td>Sales</td>
<td>Growth %</td>
<td>Population</td>
<td>Sales Per Capita</td>
</tr>
<tr>
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<tr>
<td>Shelton, WA</td>
<td>$857</td>
<td>3.70%</td>
<td>114</td>
<td>$7,666</td>
</tr>
<tr>
<td>Sheridan, WY</td>
<td>$3,228</td>
<td>10.41%</td>
<td>124</td>
<td>$26,203</td>
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<td>Sherman-Denison, TX</td>
<td>$1,670</td>
<td>6.70%</td>
<td>265</td>
<td>$6,328</td>
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<tr>
<td>Show Low, AZ</td>
<td>$1,326</td>
<td>8.41%</td>
<td>221</td>
<td>$6,013</td>
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<td>Shreveport-Bossier City, LA</td>
<td>$1,917</td>
<td>7.21%</td>
<td>958</td>
<td>$2,004</td>
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<td>Sidney, OH</td>
<td>$1,139</td>
<td>4.53%</td>
<td>75</td>
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<td>Sierra Vista-Douglas, AZ</td>
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<td>7.24%</td>
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<td>Silver City, NM</td>
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<td>101</td>
<td>$17,537</td>
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<td>Sioux City, IA-NE-SD</td>
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<td>8.39%</td>
<td>474</td>
<td>$4,427</td>
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<td>Sioux Falls, SD</td>
<td>$1,706</td>
<td>6.17%</td>
<td>511</td>
<td>$3,345</td>
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<td>Snyder, TX</td>
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<td>7.94%</td>
<td>76</td>
<td>$25,337</td>
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<tr>
<td>Somerset, KY</td>
<td>$1,930</td>
<td>9.03%</td>
<td>178</td>
<td>$11,017</td>
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<tr>
<td>Somerset, PA</td>
<td>$1,736</td>
<td>6.91%</td>
<td>203</td>
<td>$8,578</td>
</tr>
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<td>Sonora, CA</td>
<td>$2,930</td>
<td>11.92%</td>
<td>239</td>
<td>$12,732</td>
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<tr>
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<td>$1,662</td>
<td>7.03%</td>
<td>633</td>
<td>$2,679</td>
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<tr>
<td>Spartanburg, SC</td>
<td>$1,496</td>
<td>7.22%</td>
<td>635</td>
<td>$2,371</td>
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<tr>
<td>Spearfish, SD</td>
<td>$2,769</td>
<td>9.37%</td>
<td>89</td>
<td>$31,879</td>
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<td>Spencer, IA</td>
<td>$2,563</td>
<td>8.67%</td>
<td>89</td>
<td>$29,200</td>
</tr>
<tr>
<td>Spirit Lake, IA</td>
<td>$3,966</td>
<td>11.64%</td>
<td>115</td>
<td>$34,517</td>
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<td>Spokane-Spokane Valley, WA</td>
<td>$1,591</td>
<td>6.23%</td>
<td>1,206</td>
<td>$1,320</td>
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<tr>
<td>Springfield, IL</td>
<td>$2,334</td>
<td>7.57%</td>
<td>522</td>
<td>$4,497</td>
</tr>
<tr>
<td>Springfield, MA</td>
<td>$1,789</td>
<td>6.46%</td>
<td>1,397</td>
<td>$1,294</td>
</tr>
<tr>
<td>Springfield, MO</td>
<td>$1,831</td>
<td>8.09%</td>
<td>1,062</td>
<td>$1,734</td>
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<td>Springfield, OH</td>
<td>$1,328</td>
<td>6.19%</td>
<td>224</td>
<td>$1,496</td>
</tr>
<tr>
<td>St. Cloud, MN</td>
<td>$1,795</td>
<td>6.71%</td>
<td>405</td>
<td>$4,447</td>
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<td>St. George, UT</td>
<td>$1,389</td>
<td>6.97%</td>
<td>276</td>
<td>$5,046</td>
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<td>St. Joseph, MO-KS</td>
<td>$1,927</td>
<td>8.62%</td>
<td>299</td>
<td>$6,437</td>
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<tr>
<td>St. Louis, MO-IL</td>
<td>$1,890</td>
<td>6.45%</td>
<td>6,062</td>
<td>$313,616</td>
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<td>St. Marys, GA</td>
<td>$1,674</td>
<td>7.13%</td>
<td>126</td>
<td>$13,420</td>
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<tr>
<td>Starkville, MS</td>
<td>$3,828</td>
<td>18.06%</td>
<td>188</td>
<td>$20,364</td>
</tr>
<tr>
<td>State College, PA</td>
<td>$1,904</td>
<td>6.99%</td>
<td>330</td>
<td>$5,828</td>
</tr>
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<td>Statesboro, GA</td>
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<td>12.21%</td>
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<td>$11,511</td>
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<td>$1,652</td>
<td>6.71%</td>
<td>245</td>
<td>$665,403</td>
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<td>Steamboat Springs, CO</td>
<td>$3,612</td>
<td>10.02%</td>
<td>108</td>
<td>$33,364</td>
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<td>Stephenville, TX</td>
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<td>8.88%</td>
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<td>$15,496</td>
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<tr>
<td>Sterling, CO</td>
<td>$3,537</td>
<td>15.48%</td>
<td>143</td>
<td>$25,062</td>
</tr>
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<td>Sterling, IL</td>
<td>$1,498</td>
<td>5.92%</td>
<td>112</td>
<td>$13,460</td>
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<td>Stevens Point, WI</td>
<td>$2,433</td>
<td>9.85%</td>
<td>243</td>
<td>$9,347</td>
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<tr>
<td>Stillwater, OK</td>
<td>$1,996</td>
<td>8.77%</td>
<td>184</td>
<td>$10,874</td>
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<tr>
<td>Stockton-Lodi, CA</td>
<td>$1,400</td>
<td>6.62%</td>
<td>1,290</td>
<td>$1,093</td>
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<td>Storm Lake, IA</td>
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<td>8.83%</td>
<td>93</td>
<td>$23,956</td>
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<td>Sturgis, MI</td>
<td>$1,128</td>
<td>5.52%</td>
<td>124</td>
<td>$9,118</td>
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<td>$2,458</td>
<td>10.87%</td>
<td>150</td>
<td>$15,787</td>
</tr>
<tr>
<td>City</td>
<td>Price</td>
<td>Tax Rate</td>
<td>Sales</td>
<td>Revenue</td>
</tr>
<tr>
<td>-----------------------------</td>
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<td>----------</td>
<td>-------</td>
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<tr>
<td>Summerville, GA</td>
<td>$1,290</td>
<td>8.12%</td>
<td>61</td>
<td>$ 520,410</td>
</tr>
<tr>
<td>Summit Park, UT</td>
<td>$4,388</td>
<td>8.91%</td>
<td>186</td>
<td>$ 935,570</td>
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<td>Sumter, SC</td>
<td>$1,727</td>
<td>8.16%</td>
<td>243</td>
<td>$ 770,136</td>
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<td>Sunbury, PA</td>
<td>$ 760</td>
<td>3.23%</td>
<td>151</td>
<td>$ 471,490</td>
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<tr>
<td>Susanville, CA</td>
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<td>7.19%</td>
<td>96</td>
<td>$ 510,500</td>
</tr>
<tr>
<td>Sweetwater, TX</td>
<td>$1,519</td>
<td>6.63%</td>
<td>51</td>
<td>$ 454,412</td>
</tr>
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<td>Syracuse, NY</td>
<td>$2,366</td>
<td>8.32%</td>
<td>1,608</td>
<td>$ 974,297</td>
</tr>
<tr>
<td>Tahlequah, OK</td>
<td>$1,082</td>
<td>5.53%</td>
<td>98</td>
<td>$ 532,347</td>
</tr>
<tr>
<td>Talladega-Sylacauga, AL</td>
<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>
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<td>$1,954</td>
<td>7.42%</td>
<td>6,419</td>
<td>$ 888,434</td>
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<tr>
<td>Taos, NM</td>
<td>$4,652</td>
<td>20.66%</td>
<td>267</td>
<td>$ 578,127</td>
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<tr>
<td>Taylorville, IL</td>
<td>$1,930</td>
<td>7.64%</td>
<td>112</td>
<td>$ 585,036</td>
</tr>
<tr>
<td>Terre Haute, IN</td>
<td>$2,162</td>
<td>9.42%</td>
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<td>$ 790,294</td>
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<td>$2,334</td>
<td>11.04%</td>
<td>514</td>
<td>$ 682,811</td>
</tr>
<tr>
<td>The Dalles, OR</td>
<td>$2,292</td>
<td>9.07%</td>
<td>100</td>
<td>$ 593,280</td>
</tr>
<tr>
<td>The Villages, FL</td>
<td>$1,582</td>
<td>5.81%</td>
<td>144</td>
<td>$1,249,931</td>
</tr>
<tr>
<td>Thomaston, GA</td>
<td>$1,535</td>
<td>8.33%</td>
<td>58</td>
<td>$ 696,672</td>
</tr>
<tr>
<td>Thomasville, GA</td>
<td>$2,399</td>
<td>13.36%</td>
<td>146</td>
<td>$ 741,007</td>
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<tr>
<td>Tococa, GA</td>
<td>$1,888</td>
<td>9.27%</td>
<td>71</td>
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<td>$1,748</td>
<td>7.18%</td>
<td>1,422</td>
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<tr>
<td>Topeka, KS</td>
<td>$1,224</td>
<td>4.64%</td>
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<td>Torrington, CT</td>
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<td>6.57%</td>
<td>1,018</td>
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</tr>
<tr>
<td>Troy, AL</td>
<td>$1,495</td>
<td>7.61%</td>
<td>87</td>
<td>$ 577,816</td>
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<tr>
<td>Truckee-Grass Valley, CA</td>
<td>$1,531</td>
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<td>238</td>
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</tr>
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</tr>
<tr>
<td>Ukiah, CA</td>
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<td>Urbana, OH</td>
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<td>2.90%</td>
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<td>Uvalde, TX</td>
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<td>$ 554,346</td>
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<td>6.07%</td>
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<td>$1,180</td>
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<td>Location</td>
<td>Average Salary</td>
<td>Average Salary %</td>
<td>Employees</td>
<td>Average Annual Sales</td>
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<td>----------------------------------</td>
<td>----------------</td>
<td>------------------</td>
<td>-----------</td>
<td>----------------------</td>
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<td>4.68%</td>
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<td>Vermillion, SD:</td>
<td>$1,858</td>
<td>9.03%</td>
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<td>6.50%</td>
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<td>Vernon, TX:</td>
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<td>$2,034</td>
<td>4.46%</td>
<td>13,289</td>
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<tr>
<td>Washington, IN:</td>
<td>$1,605</td>
<td>7.06%</td>
<td>85</td>
<td>$618,000</td>
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<td>Washington, NC:</td>
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<td>10.68%</td>
<td>150</td>
<td>$714,127</td>
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<tr>
<td>Waterloo-Cedar Falls, IA:</td>
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<td>7.47%</td>
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<td>$818</td>
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<td>6.37%</td>
<td>95</td>
<td>$491,158</td>
</tr>
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<td>4.84%</td>
<td>308</td>
<td>$472,740</td>
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<td>261</td>
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<td>$1,956</td>
<td>8.10%</td>
<td>355</td>
<td>$838,687</td>
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<td>Wichita, KS:</td>
<td>$1,518</td>
<td>6.16%</td>
<td>1,422</td>
<td>$683,334</td>
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<td>302</td>
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<td>Williston, ND:</td>
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<td>7.14%</td>
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<td>Willmar, MN:</td>
<td>$2,586</td>
<td>9.45%</td>
<td>135</td>
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<td>Wilmington, NC:</td>
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<td>7.87%</td>
<td>794</td>
<td>$778,875</td>
</tr>
<tr>
<td>City</td>
<td>Median Price</td>
<td>Median PIM</td>
<td>50 Percentile</td>
<td>Value</td>
</tr>
<tr>
<td>---------------------------</td>
<td>--------------</td>
<td>------------</td>
<td>---------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Wilmington, OH:</td>
<td>$2,008</td>
<td>9.43%</td>
<td>121</td>
<td>$696,231</td>
</tr>
<tr>
<td>Wilson, NC:</td>
<td>$1,746</td>
<td>9.19%</td>
<td>175</td>
<td>$820,869</td>
</tr>
<tr>
<td>Winchester, VA-WV:</td>
<td>$2,264</td>
<td>8.15%</td>
<td>349</td>
<td>$864,103</td>
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<tr>
<td>Winnemucca, NV:</td>
<td>$3,019</td>
<td>9.99%</td>
<td>52</td>
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<tr>
<td>Winona, MN:</td>
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<td>6.46%</td>
<td>101</td>
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<tr>
<td>Winston-Salem, NC:</td>
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<td>1,225</td>
<td>$785,140</td>
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<td>Wisconsin Rapids-Marshfield, WI:</td>
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<td>6.74%</td>
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<td>Worcester, MA-CT:</td>
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</tr>
<tr>
<td>Yakima, WA:</td>
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<td>6.23%</td>
<td>449</td>
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</tr>
<tr>
<td>Yankton, SD:</td>
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<td>69</td>
<td>$612,391</td>
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<td>York-Hanover, PA:</td>
<td>$1,422</td>
<td>5.14%</td>
<td>800</td>
<td>$783,500</td>
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<td>Youngstown-Warren, OH-PA:</td>
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<td>6.50%</td>
<td>1,115</td>
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<td>Yuba City, CA:</td>
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<td>7.09%</td>
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<td>Yuma, AZ:</td>
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<td>Zanesville, OH:</td>
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<td>8.20%</td>
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<td>Zapata, TX:</td>
<td>$1,070</td>
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<td>38</td>
<td>$416,526</td>
</tr>
</tbody>
</table>

### 29.3 Market Resources

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

MARKET GROWTH POTENTIAL

30.1 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 29.1 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 was calculated by Restaurant Business for 917 MSAs and µSAs by Nielsen.

30.2 Growth Potential for MSAs
The Restaurant Growth Index for each MSA and µSA is as follows:

- Kahului-Wailuku-Lahaina, HI: 517
- Kapaa, HI: 457
- Las Vegas-Henderson, NV: 453
- Sevierville, TN: 382
- Starkville, MS: 363
- Effingham, IL: 333
- Liberal, KS: 311
- Ocean City, NJ: 306
- Carson City, NV: 303
- Honolulu (Urban), HI: 292
- Boone, NC: 290
- Greenwood, MS: 286
- Reno, NV: 284
- Berlin, NH-VT: 283
- Gardnerville Ranchos, NV: 282
- Mount Vernon, IL: 278
- Pecos, TX: 265
- Salisbury, MD-DE: 265
- Branson, MO: 263
- Oxford, MS: 262
- Middlesborough, KY: 261
- Panama City, FL: 255
- Cullowhee, NC: 253
- Hattiesburg, MS: 252
- Tifton, GA: 252
- Atlantic City-Hammonton, NJ: 248
- Lake City, FL: 248
- Hilo, HI: 246
- Carbondale-Marion, IL: 242
- Elmira, NY: 241
- Kill Devil Hills, NC: 241
- Grenada, MS: 240
- Charleston-Mattoon, IL: 238
- Taos, NM: 238
- Flagstaff, AZ: 232
- Maryville, MO: 231
<table>
<thead>
<tr>
<th>City</th>
<th>Code</th>
</tr>
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<tbody>
<tr>
<td>Bangor, ME</td>
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<tr>
<td>Big Stone Gap, VA</td>
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<td>Orlando-Sanford, FL</td>
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<tr>
<td>Vincennes, IN</td>
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<td>Richmond, IN</td>
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<tr>
<td>Cordele, GA</td>
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<tr>
<td>Crestview, FL</td>
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</tr>
<tr>
<td>Sault Ste. Marie, MI</td>
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<tr>
<td>Mount Pleasant, MI</td>
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<tr>
<td>Watertown-Fort Drum, NY</td>
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<tr>
<td>Henderson, NC</td>
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<td>Tupelo, MS</td>
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<tr>
<td>Winnemucca, NV</td>
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<td>Easton, MD</td>
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<tr>
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</tr>
<tr>
<td>Ludington, MI</td>
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<tr>
<td>Greensburg, IN</td>
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<tr>
<td>Jamestown-Fredonia, NY</td>
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• Hammond, LA: 160
• Lafayette-West Lafayette, IN: 160
• Alexandria, LA: 159
• Gulfport-Biloxi, MS: 159
• Laurel, MS: 159
• Marshall, MN: 159
• Defiance, OH: 158
• Poplar Bluff, MO: 158
• Jackson, MS: 157
• Sedalia, MO: 157
• Sonora, CA: 157
• Champaign-Urbana, IL: 156
• Kankakee, IL: 156
• Steamboat Springs, CO: 156
• Mankato-N. Mankato, MN: 155
• Pensacola-Brent, FL: 155
• Burlington, NC: 154
• Willmar, MN: 154
• Edwards, CO: 153
• Harrisonburg, VA: 153
• Quincy, IL-MO: 153
• Deltona-Daytona Beach, FL: 152
• Greenville, MS: 152
• Jacksonville, IL: 152
• Montrose, CO: 152
• Prineville, OR: 152
• Stillwater, OK: 152
• Washington, NC: 152
• Chico, CA: 151
• College Station-Bryan, TX: 151
• El Centro, CA: 151
• Fallon, NV: 151
• Mount Pleasant, TX: 151
• Portales, NM: 151
• Rochester, NY: 151
• Casper, WY: 150
• Joplin, MO: 150
• Tallahassee, FL: 150
• Texarkana, TX-AR: 150
• Wilson, NC: 150
• Lewisburg, PA: 149
• Lexington, NE: 148
• Spearfish, SD: 148
• Terre Haute, IN: 148
• Waycross, GA: 148
• Astoria, OR: 147
• Binghamton, NY: 147
• Galesburg, IL: 147
• Lumberton, NC: 147
• Pittsburg, KS: 147
• Farmington, MO: 146
• Fresno, CA: 146
• Greenville, NC: 146
• Ithaca, NY: 146
• Lake Charles, LA: 146
• Dover, DE: 145
• New Ulm, MN: 145
• The Villages, FL: 145
• Bennettsville, SC: 144
• Brookhaven, MS: 144
• Cookeville, TN: 144
• Nacogdoches, TX: 144
• Big Rapids, MI: 143
• Brunswick, GA: 143
• Danville, KY: 143
• McComb, MS: 143
• Springfield, IL: 143
• Anniston-Jacksonville, AL: 142
• Houghton, MI: 142
• Lakeland-Winter Haven, FL: 142
• Modesto, CA: 142
• St. Joseph, MO-KS: 142
• Marion, IN: 141
• Anchorage, AK: 140
• Athens-Clarke County, GA: 140
• Jacksonville, FL: 140
• Napa, CA: 140
• Savannah, GA: 140
• Winchester, VA-WV: 140
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• Stevens Point, WI: 139
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• San Luis Obispo, CA: 123
• Sebring, FL: 123
• Visalia-Porterville, CA: 123
• Yuba City, CA: 123
• Albany-Schenectady, NY: 122
• Dothan, AL: 122
• Forrest City, AR: 122
• Fort Collins, CO: 122
• Hutchinson, MN: 122
• Oskaloosa, IA: 122
• Palatka, FL: 122
• Roanoke Rapids, NC: 122
• Wilmington, NC: 122
• Albuquerque, NM: 121
• Cleveland, MS: 121
• Fayetteville, NC: 121
• Clarksdale, MS: 120
• Dumas, TX: 120
• Elkhart-Goshen, IN: 120
• North Port-Sarasota, FL: 120
• Rock Springs, WY: 120
• Duluth, MN-WI: 119
• Morehead City, NC: 119
• Muskegon, MI: 119
• Peoria, IL: 119
• San Antonio-N Braunfels, TX: 119
• Sikeston, MO: 119
• Dubuque, IA: 118
• Madisonville, KY: 118
• Parkersburg-Vienna, WV: 118
• San Angelo, TX: 118
• Trenton, NJ: 118
• La Crosse-Onalaska, WI-MN: 117
• Laconia, NH: 117
• Lynchburg, VA: 117
• Price, UT: 117
• Saginaw, MI: 117
• Salina, KS: 117
• South Bend-Mish., IN-MI: 117
• Virginia Beach, VA-NC: 117
• Fergus Falls, MN: 116
• Florence, SC: 116
• Gillette, WY: 116
• Knoxville, TN: 116
• Lexington-Fayette, KY: 116
• McAllen-Edinburg, TX: 116
• Miami, OK: 116
• Odessa, TX: 116
• Sebastian-Vero Beach, FL: 116
• Thomaston, GA: 116
• Utica-Rome, NY: 116
• Beaumont-Port Arthur, TX: 115
• Georgetown, SC: 115
• Hartford-West Hartford, CT: 115
• Indianapolis-Anderson, IN: 115
• Jefferson City, MO: 115
• Mason City, IA: 115
• Morgantown, WV: 115
• Pueblo, CO: 115
• Rockingham, NC: 115
• Bakersfield, CA: 114
• Daphne-Fairhope-Foley, AL: 114
• Kingsville, TX: 114
• Lewiston-Auburn, ME: 114
• Memphis, TN-MS-AR: 114
• Owensboro, KY: 114
• Sierra Vista-Douglas, AZ: 114
• St. Cloud, MN: 114
• Amarillo, TX: 113
• Baton Rouge, LA: 113
• Jacksonville, TX: 113
• Lake Havasu C-Kingman, AZ: 113
• Longview, TX: 113
• San Diego-Carlsbad, CA: 113
• St. Louis, MO-IL: 113
• Brownwood, TX: 112
• Dalton, GA: 112
• Greensboro-High Point, NC: 112
• Angola, IN: 111
• Danville, VA: 111
• Fairbanks, AK: 111
• Lufkin, TX: 111
• Naples-Immokalee, FL: 111
<table>
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• Fort Morgan, CO: 74
• Jesup, GA: 74
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</tr>
<tr>
<td>Marietta, OH</td>
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<tr>
<td>San Jose-Sunnyvale, CA</td>
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<tr>
<td>Albany, OR</td>
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<tr>
<td>Austin, MN</td>
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<tr>
<td>Bridgeport-Stamford-Norwalk, CT</td>
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<tr>
<td>Forest City, NC</td>
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<tr>
<td>Dixon, IL</td>
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<td>Hobbs, NM</td>
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<td>Ottawa, KS</td>
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<tr>
<td>Ponca City, OK</td>
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<tr>
<td>Tiffin, OH</td>
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<tr>
<td>Walla Walla, WA</td>
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<tr>
<td>Weatherford, OK</td>
<td>62</td>
</tr>
</tbody>
</table>
• Burlington-S Burlington, VT: 61
• Lock Haven, PA: 61
• Manchester-Nashua, NH: 61
• Port Clinton, OH: 61
• San Francisco-Oakland, CA: 61
• Sturgis, MI: 61
• Dunn, NC: 60
• Faribault-Northfield, MN: 60
• Great Bend, KS: 60
• Sweetwater, TX: 60
• Topeka, KS: 60
• Torrington, CT: 60
• Van Wert, OH: 60
• Frankfort, IN: 59
• Heber, UT: 59
• Reading, PA: 59
• Rochelle, IL: 59
• Tahlequah, OK: 59
• Aberdeen, WA: 58
• Cedar Rapids, IA: 58
• Greenfield Town, MA: 58
• Hastings, NE: 58
• Hereford, TX: 58
• Valley, AL: 58
• Ashtabula, OH: 57
• Levelland, TX: 57
• Truckee-Grass Valley, CA: 57
• Arkansas City-Winfield, KS: 56
• Atchison, KS: 56
• Claremont-Lebanon, NH-VT: 55
• Gettysburg, PA: 55
• Oak Harbor, WA: 55
• Sayre, PA: 55
• Wapakoneta, OH: 55
• Coos Bay, OR: 54
• Lebanon, PA: 54
• Mountain Home, ID: 54
• Norwalk, OH: 54
• Racine, WI: 54
• Seneca, SC: 54
• Bartlesville, OK: 53
• Bellefontaine, OH: 53
• Borger, TX: 53
• Dickinson, ND: 53
• Harrison, AR: 53
• Mount Vernon, OH: 53
• Zapata, TX: 53
• Jamestown, ND: 52
• Owosso, MI: 52
• Ozark, AL: 52
• Alma, MI: 51
• Blytheville, AR: 51
• Lewisburg, TN: 51
• Mayfield, KY: 51
• Muscatine, IA: 51
• DeRidder, LA: 50
• Manistowoc, WI: 50
• Brevard, NC: 49
• El Dorado, AR: 49
• Watertown-Fort Atkinson, WI: 49
• Burley, ID: 48
• Clearlake, CA: 48
• Oxford, NC: 48
• Celina, OH: 47
• Ionia, MI: 46
• Weirton-Steubenville, WV-OH: 46
• Fairmont, WV: 45
• Ft Madison-Keokuk, IA-IL-MO: 45
• McPherson, KS: 45
• Port Lavaca, TX: 45
• Salem, OH: 45
• Shawano, WI: 45
• Helena-West Helena, AR: 41
• Blackfoot, ID: 39
• Camden, AR: 39
• Fairfield, IA: 38
• Hillsdale, MI: 38
• Malvern, AR: 37
• Wahpeton, ND-MN: 37
• Pottsville, PA: 36
• Shelton, WA: 34
• Duncan, OK: 33
• Beaver Dam, WI: 32
• Boone, IA: 31
• North Vernon, IN: 31
• Sunbury, PA: 30
• Urbana, OH: 29
• Los Alamos, NM: 17
30.3 Market Resources
Restaurant Business, 1 Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181. (630) 574-5075. (www.restaurantbusinessonline.com)

PART VI: MARKET SEGMENTS
31

CASUAL-DINING RESTAURANTS

31.1 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.


Eighty-one (81) casual-dining chains rank among the 250 largest U.S. restaurant chains, according to Restaurant Business (June 2017). Their combined sales are $51.1 billion.

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.

31.2 Segment Trends

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

According to The NPD Group (www.npd.com), casual-dining traffic declined 2% each year from 2011 through 2015, was flat in 2015, and declined in 2016. Weekday traffic has been flat since 2014, while weekend traffic has declined each year since 2013.

Knapp Track (www.malcolmknapp.com) assessed that since 2008, casual dining traffic has fallen by an average of about 3% a year.
“The segment has struggled to generate traffic for more than a decade now. Casual-dining chains have done everything to get customers back in their restaurants. They’ve discounted, and then reversed that tactic. They’ve added technology, changed menus, remodeled locations, and improved service. But with traffic declines going back a decade, it’s safe to wonder whether mass-market casual dining can truly be saved.”

*Nation’s Restaurant News, 9/5/16*

One bright spot for casual dining restaurants in takeout. According to Technomic (www.technomic.com), takeout accounted for 16% of adults’ traditional casual-dining restaurant orders in 2016, an increase from 11% in 2014.

“Casual-dining chains finally have a solution to the decade-long problem of fewer customers dining at their restaurants: Take the food directly to the customers. Just about every large casual dining concept of note is currently working on some form of to-go and delivery strategy.”

*Nation’s Restaurant News, 5/29/17*

### 31.3 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; those at mass-market casual brands are typically between $12 and $20.
According to the 2016 Family & Casual-Dining Consumer Trend Report, by Technomic, 36% of adults visit upscale casual-dining restaurants at least once a month, up from 31% in 2014.

Upscale-casual chains include Brio, Cheddar’s Scratch Kitchen, Joe’s Crab Shack, and Yard House. Each of these chains are experiencing annual sales growth of 10% 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
32

CATERING & BANQUETS

32.1 Market Assessment

The National Restaurant Association (www.restaurant.org) assesses social caterers’ sales for 2017 at $8.6 billion, a 4.0% increase over the previous year. 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. Technomic identifies 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.

32.2 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.

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.

According to Restaurant Business (May 2017), 21% of adults who work outside the home say they are likely to place a catering order with a restaurant for lunch with co-workers, an increase from 17% who would have done so three years prior. Among those ages 18-to-34, 35% say they would place a lunchtime catering order.
“As restaurant operators continue to look for new revenue streams, many are expanding or retooling their catering programs and differentiating what they offer to the office crowd. Although companies providing meals at work still need options that are easy to serve and clean to eat, they are increasingly seeking catered restaurants meals that offer creative, customizable and healthier food options without losing the simplicity. To meet those needs, some trends have emerged on office-catering menus.”

Trends In Catering To The Office Crowd
Restaurant Business, 5/17

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.

32.3 Market Resources
National Association for Catering & Events, 10440 Little Patuxent Parkway, Suite 300, Columbia, MD 21044. (410) 290-5410. (www.nace.net)
33

COFFEESHOPS

33.1 Profile

According to the Specialty Coffee Association of America (www.scaa.org), there are approximately 32,000 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.

33.2 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></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
33.3 **Coffeeshop Chains**

Starbucks, with 13,172 locations at year-end 2016 and $14.7 billion in revenue, dominates the segment.

Peet’s Coffee & Tea and Caribou Coffee, with $272 million and $255 million in sales in 2016, respectively, are the only other coffeeshop chains ranking among the 150 largest restaurant chains. Both chains were acquired by Joh. A. Benckiser Group in 2012. Combined, the two chains operate about 650 stores.

33.4 **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%; orders for specialty coffees are up 5%.

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.

33.5 **Market Resources**

(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)
34.1 Market Assessment
The National Restaurant Association (www.restaurant.org) assesses the college and university foodservice market in 2017 at $17.4 billion, a 5.1% increase over the previous year.

The College Explorer Survey, by re:fuel (www.refuelagency.com), estimates that college students spent $45 billion on food outside of dormitory foodservice during each academic year.

34.2 Characteristics Of Campus Dining
The 2017 College & University Consumer Trend Report, by Technomic (www.technomic.com), provides the following assessment:

- Seventy-nine percent (79%) of freshman purchase food or beverage from an on-campus foodservice facility at least once a week, compared to 62% of seniors.
- Sixty-six percent (66%) of students order food from an off-campus restaurant at least once a week.
- Fifty-four percent (54%) of students strongly agree that it’s important to eat healthy and pay attention to nutrition.
- Fifty-three percent (53%) of students visit off-campus restaurants more often during the weekend than during the week.
- Forty-six percent (46%) of students’ meals are taken to go.
- Forty-three percent (43%) of students say dining programs and amenities were at least somewhat important in deciding which school to attend.
- Forty-two percent (42%) of students say their school’s foodservice facilities to offer more technology to enhance convenience.
- Forty-one percent (41%) of students say it’s important that the foodservice locations they visit are socially and environmentally responsible.
- Thirty-six percent (36%) of students say they are more likely to purchase breakfast off campus rather than on campus, up from 30% in 2015.
- Twenty-three percent (23%) of students prefer sports drinks for lunch, up from 18% in 2015.
- Twenty-one percent (21%) of students typically skip breakfast.
34.3 Best Collegiate Dining

An August 2017 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. Duke University (Durham, NC)
2. Columbia University (New York, NY)
3. Bowdoin College (Brunswick, ME)
4. Johns Hopkins University (Baltimore, MD)
5. Kennesaw State University (Kennesaw, GA)
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. University of Massachusetts (Amherst, MA)
13. Vanderbilt University (Nashville, TN)
14. James Madison University (Harrisonburg, VA)
15. University of Georgia (Athens, GA)
16. University of California at Los Angeles (Los Angeles, CA)
17. Mills College (Oakland, CA)
18. Miami University (Oxford, OH)
19. Brown University (Providence, RI)
20. University of California at San Diego (San Diego, CA)
21. University of South Carolina (Columbia, SC)
22. Yale University (New Haven, CT)
23. University of Rochester (Rochester, NY)
24. Harvard University (Cambridge, MA)
25. St. Olaf College (Northfield, MN)
26. Stanford University (Stanford, CA)
27. University of Connecticut (Storrs, CT)
28. Pitzer College (Claremont, CA)
29. University of California at Berkeley (Berkeley, CA)
30. University of Pennsylvania (Philadelphia, PA)
31. University of San Diego (San Diego, CA)
32. Washington University in St Louis (St. Louis, MO)
33. Purdue University (West Lafayette, IN)
34. High Point University (High Point, NC)
35. Virginia Tech (Blacksburg, VA)
36. Northeastern University (Boston, MA)
37. University of Chicago (Chicago, IL)
38. Carroll University (Waukesha, WI)
39. Wesleyan University (Middletown, CT)
40. Muhlenberg College (Allentown, PA)
Annually, Niche (www.niche.com) ranks college food programs based on meal plan costs and student reviews. The 2017 Best College Food ranking is as follows:
1. University of California at Los Angeles (Los Angeles, CA)
2. Virginia Tech (Blacksburg, VA)
3. Washington University in St. Louis (Saint Louis, MO)
4. The Culinary Institute of America (Hyde Park, NY)
5. Bowdoin College (Brunswick, ME)
6. Bates College (Lewiston, ME)
7. University of Massachusetts - Amherst (Amherst, MA)
8. California Baptist University (Riverside, CA)
9. James Madison University (Harrisonburg, VA)
10. University of Georgia (Athens, GA)
11. Hendrix College (Conway, AR)
12. University of Oregon (Eugene, OR)
13. Kendall College (Chicago, IL)
14. Wesleyan University (Middletown, CT)
15. St. Norbert College (De Pere, WI)
16. Middlebury College (Middlebury, VT)
17. Wheaton College - Illinois (Wheaton, IL)
18. Skidmore College (Saratoga Springs, NY)
19. Liberty University (Lynchburg, VA)
20. Gustavus Adolphus College (Saint Peter, MN)
21. Grand Canyon University (Phoenix, AZ)
22. University of New Hampshire (Durham, NH)
23. Stanford University (Stanford, CA)
24. Ashland University (Ashland, OH)
25. University of San Diego (San Diego, CA)
26. Cornell University (Ithaca, NY)
27. Kennesaw State University (Kennesaw, GA)
28. Muhlenberg College (Allentown, PA)
29. Rice University (Houston, TX)
30. High Point University (High Point, NC)
31. Sullivan University (Louisville, KY)
32. University of Dayton (Dayton, OH)
33. Pitzer College (Claremont, CA)
34. Roger Williams University (Bristol, RI)
35. University of California - Davis (Davis, CA)
36. St. John Fisher College (Rochester, NY)
37. Vanderbilt University (Nashville, TN)
38. St. Olaf College (Northfield, MN)
39. University of Scranton (Scranton, PA)
40. Tufts University (Medford, MA)
41. Concordia College (Moorhead, MN)
42. Boston University (Boston, MA)
43. University of Wisconsin (Madison, WI)
44. Maranatha Baptist University (Watertown, WI)
45. Purdue University (West Lafayette, IN)
46. The College of Idaho (Caldwell, ID)
47. Princeton University (Princeton, NJ)
48. Michigan State University (East Lansing, MI)
49. University of Colorado - Boulder (Boulder, CO)
50. Pomona College (Claremont, CA)
51. University of Notre Dame (Notre Dame, IN)
52. Ferris State University (Big Rapids, MI)
53. Colorado College (Colorado Springs, CO)
54. Gettysburg College (Gettysburg, PA)
55. Southern New Hampshire University (Manchester, NH)
56. New York University (New York, NY)
57. Claremont McKenna College (Claremont, CA)
58. Santa Clara University (Santa Clara, CA)
59. Alverno College (Milwaukee, WI)
60. Biola University (La Mirada, CA)
61. Rollins College (Winter Park, FL)
62. University of St. Thomas (Saint Paul, MN)
63. Dartmouth College (Hanover, NH)
64. Scripps College (Claremont, CA)
65. Colby College (Waterville, ME)
66. Bryn Mawr College (Bryn Mawr, PA)
67. Saint Anselm College (Manchester, NH)
68. Lafayette College (Easton, PA)
69. Ball State University (Muncie, IN)
70. Yale University (New Haven, CT)
71. Ohio State University (Columbus, OH)
72. Andrews University (Berrien Springs, MI)
73. SUNY Potsdam (Potsdam, NY)
74. Whitman College (Walla Walla, WA)
75. Murray State University (Murray, KY)
76. University of Michigan - Ann Arbor (Ann Arbor, MI)
77. Seattle University (Seattle, WA)
78. Mount Holyoke College (South Hadley, MA)
79. Bellevue University (Bellevue, NE)
80. Lawrence University (Appleton, WI)
81. Iowa State University (Ames, IA)
82. Occidental College (Los Angeles, CA)
83. Lynn University (Boca Raton, FL)
84. Lewis & Clark College (Portland, OR)
85. Florida International University (Miami, FL)
86. University of California - Santa Barbara (Santa Barbara, CA)
87. Brigham Young University (Provo, UT)
88. University of California - Santa Cruz (Santa Cruz, CA)
89. Mississippi State University (Mississippi State, MS)
90. Goucher College (Baltimore, MD)
91. Kent State University (Kent, OH)
92. North Dakota State University (Fargo, ND)
93. University of Missouri (Columbia, MO)
94. University of Texas - San Antonio (San Antonio, TX)
95. Indiana Wesleyan University (Marion, IN)
96. University of Richmond (Richmond, VA)
97. Arkansas Tech University (Russellville, AR)
98. University of Memphis (Memphis, TN)
99. SUNY University at Buffalo (Buffalo, NY)
100. Bucknell University (Lewisburg, PA)
**35.1 Profile**

The National Restaurant Association (www.restaurant.org) assessed food and drink revenue for contract-managed foodservices at $53.6 billion in 2017, a 4.8% increase over the previous year. Distribution was follows (change from previous year in parenthesis):

- Colleges and universities: $17.4 billion (5.1%)
- Manufacturing and industrial plants: $ 9.0 billion (4.0%)
- Primary and secondary schools: $ 7.2 billion (3.5%)
- Recreation and sports centers: $ 7.4 billion (5.8%)
- Hospitals and nursing homes: $ 6.7 billion (6.0%)
- Commercial and office buildings: $ 3.3 billion (4.2%)
- In-transit foodservice (airlines): $ 2.6 billion (3.8%)

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.

35.2 Segment Trends

Technomic assesses the strongest growth in the healthcare (4.5%) and business & industry (4.0%) subsegments. As a whole, noncommercial foodservice operations are growing at a 3.7% annual rate.

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 (www.restaurantassociates.com), which introduced a 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%).

35.3 Market Resources

Foodservice Director. (www.foodservicedirector.com)

Foodservice News. (www.foodservicenews.net)
**36.1 Market Assessment**

According to the National Association of Convenience Stores (NACS, www.nacsonline.com), there were approximately 154,000 convenience stores (c-stores) in the United States as of June 2017. C-stores serve 160 million people daily, or about one-half the U.S. population.

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.

Convenience store sales grew during the first half of 2017, according to the results of the quarterly survey of convenience retailers released in August 2017 by the National Association of Convenience Stores (NACS).

Sixty-seven percent (67%) of convenience retailers reported that sales during the first half of 2017 were higher than the same period the prior year. Sales increases were, in part, attributed to growth in foodservice sales.

_________________________________________________________________

“Retailers are even more optimistic about sales for the second half of the year. The c-store industry’s movement toward embracing more fresh and prepared food is driving retailer optimism; 62% of retailers said that more opportunities to grow food sales is a reason for being optimistic about their business prospects. And 58% said they are optimistic about their ability to compete against quick-service restaurants.”

NACS, 6/28/17

_________________________________________________________________
Technomic (www.technomic.com) estimated annual convenience-store foodservice (excluding beverage sales) at $11.6 billion. 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 generates $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

### 36.2 Market Leaders

The following convenience stores have the highest foodservice sales (source: *Nation’s Restaurant News*, June 2017):

<table>
<thead>
<tr>
<th>Foodservice Sales</th>
<th>Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>7-Eleven: $2.48 billion</td>
<td>7,904</td>
</tr>
<tr>
<td>Wawa: $1.80 billion</td>
<td>748</td>
</tr>
<tr>
<td>Casey’s General Stores:</td>
<td>$ 958 million 1,979</td>
</tr>
<tr>
<td>Circle K: $ 911 million</td>
<td>4,240</td>
</tr>
<tr>
<td>Sheetz: $ 711 million</td>
<td>533</td>
</tr>
</tbody>
</table>

### 36.3 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%. 

*RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019*
“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.

36.4 Segment Trends

Consumer Brand Metrics (April 2017), by Technomic, provides the following assessment of c-store foodservice:

• Among c-store patrons who purchase hot food, 76% buy snacks and 62% buy breakfast at least once a month.
• Sixty-six percent (66%) of Millennials and 56% of all adults feel that convenience stores are just as capable as restaurants in offering fresh food and beverages.
• Fifty-eight percent (58%) of convenience stores have expanded, or planned to expand, their foodservice offerings in 2017.

“Competition [for restaurants] rises as consumers warm to food at c-stores. While it may be the promises of speed, convenience, and value that are getting customers in the door at c-stores, they’re increasingly staying for the food – especially breakfast and snacks.”

Restaurant Business, 4/17
36.5 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 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 are increasing at about 20% per year, 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.

36.6 Market Resources

National Association of Convenience Stores (NACS), 1600 Duke Street, 7th Floor, Alexandria, VA 22314. (703) 684-3600. (www.nacsonline.com)
37.1 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.

Twenty-one (21) family-dining chains rank among the 250 largest U.S. restaurant chains, according to Restaurant Business (June 2017). Their combined annual sales are $14.0 billion.

While the segment’s sales held up during the recession, there has been no overall growth since 2010. Sales for the sector dropped 0.2% in 2016, according to Nation’s Restaurant News, and several of the major chains experienced even larger declines.

______________________________________________________________

“It was a tough year for family-dining restaurants, with most chains posting declines in domestic annual sales. That included the top grossing chain, IHOP, which saw estimated sales dip 0.8%, to $3.1 billion, despite opening a net 33 units – the most new restaurants in the segment. Golden Corral, Bob Evans Restaurants, and Perkins Restaurant & Bakery all continued to close units, as they did in the preceding year, and estimated sales per unit also shrank at those chains.”

Nation’s Restaurant News, 6/19/17

______________________________________________________________
37.2 Overview

According to the Family & Casual-Dining Consumer Trend Report, published in November 2016 by Technomic (www.technomic.com), 23% of adults dine at a family-style restaurant because of their menu variety, up from 18% in 2014.

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.

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. Denny’s, the second largest chain in the sector, is in the midst of a major renovation program.

________________________________________________________

“Denny’s has continued the Heritage remodeling program that reinforces the brand’s image as America’s Diner, and has reportedly resulted in same-store sales increases in the mid-single digits. More than half of the chain’s locations had completed the remodel as of the end of 2016.”

Nation’s Restaurant News, 6/19/17

________________________________________________________
38.1 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 $40 billion segment in 2016.

According to the 2016 Directory of Chain Restaurant Operators, there were 26,519 fast-casual chain units in the U.S. in 2016.

Fifty-three (53) fast-casual chains rank among the 250 largest U.S. restaurant chains, according to Restaurant Business (June 2017). Their combined annual sales are $32.9 billion.

38.2 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
<table>
<thead>
<tr>
<th>Italian/Pizza</th>
<th>Sandwich</th>
<th>Mexican</th>
<th>Specialty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fazoli’s</td>
<td>Jimmy John’s</td>
<td>Chipotle Mexican Grill</td>
<td>Dickey’s Barbecue Pit</td>
</tr>
<tr>
<td>Donatos Pizza</td>
<td>Jason’s Deli</td>
<td>Qdoba Mexican Grill</td>
<td>Saladworks</td>
</tr>
<tr>
<td>Wolfgang Puck Express</td>
<td>McAlister’s Deli</td>
<td>Moe’s Southwest Grill</td>
<td>Shane’s Rib Shack</td>
</tr>
<tr>
<td>ZPizza</td>
<td>Firehouse Subs</td>
<td>Taco Cabana</td>
<td>Daphne’s California Greek</td>
</tr>
<tr>
<td>Straw Hat Pizza</td>
<td>Jersey Mike’s Subs</td>
<td>Baja Fresh Mexican Grill</td>
<td>Muscle Maker Grill</td>
</tr>
</tbody>
</table>

### 38.3 Market Trends

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.

The fast-casual segment continues to expand while the casual dining segment is contracting. The growth rate, however, has slowed significantly as the segment has matured. As recently as 2015, sales are increasing at a 10% annual rate, the highest of any restaurant segment. Growth in 2016 was about 3%. Problems at a few chains affected the numbers for the entire segment. Cosi filed for bankruptcy in 2016 and closed 29 restaurants. Noodles & Company and Pollo Tropical closed 55 and 10 locations, respectively. Fast-casual pizza chain Pie Five experienced a 17.4% decline in sales in 2016. Several other fast-casual chains are finding the market to be saturated and have scaled down expansion plans.

“**The fast-casual restaurant bubble has popped. Weak same-store sales and aggressive development have resulted in a recent spate of fast-casual unit closures.**”

*Nation’s Restaurant News, 4/17/17*
38.4 Comparison of Quick-Service and Fast-Casual

According to a survey by The NPD Group (www.npd.com), 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.
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.
39.1 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 has become 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.

39.2 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 2.22 billion person-trips in 2016, an all-time record, according to the U.S. Travel Association (www.ustravel.org). Traveler spending has also rebounded to pre-recession levels, reaching $973 billion in 2016 ($836.7 billion domestic travel spending and $136.3 billion from international travelers to the U.S.). Since 2014, the increase in traveler 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

39.3 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
## 40.1 Market Assessment

According to Airport Experience News (www.airportxnews.com), restaurant, food & beverage spending by travelers at the 50 largest airports in North America in 2017 was $5.51 billion.

Airports with the highest restaurant spending were as follows:

<table>
<thead>
<tr>
<th>Airport Name</th>
<th>Spending (in million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hartsfield-Jackson Atlanta International Airport</td>
<td>$363.60</td>
</tr>
<tr>
<td>Los Angeles International Airport (LAX)</td>
<td>$354.28</td>
</tr>
<tr>
<td>O'Hare International Airport - Chicago (ORD)</td>
<td>$327.32</td>
</tr>
<tr>
<td>John F. Kennedy International Airport - New York (JFK)</td>
<td>$270.99</td>
</tr>
<tr>
<td>San Francisco International Airport (SFO)</td>
<td>$252.50</td>
</tr>
<tr>
<td>Denver International Airport (DEN)</td>
<td>$250.12</td>
</tr>
<tr>
<td>Dallas/Fort Worth International Airport (DFW)</td>
<td>$221.26</td>
</tr>
<tr>
<td>McCarran International Airport - Las Vegas (LAS)</td>
<td>$199.35</td>
</tr>
<tr>
<td>Newark Liberty International Airport (EWR)</td>
<td>$197.27</td>
</tr>
<tr>
<td>Seattle-Tacoma International Airport (SEA)</td>
<td>$176.30</td>
</tr>
<tr>
<td>Miami International Airport (MIA)</td>
<td>$167.87</td>
</tr>
<tr>
<td>Orlando International Airport (MCO)</td>
<td>$167.40</td>
</tr>
<tr>
<td>Phoenix Sky Harbor International Airport (PHX)</td>
<td>$160.63</td>
</tr>
<tr>
<td>Logan International Airport - Boston (BOS)</td>
<td>$155.53</td>
</tr>
<tr>
<td>George Bush Intercontinental Airport - Houston (IAH)</td>
<td>$154.53</td>
</tr>
<tr>
<td>Minneapolis-Saint Paul International Airport (MSP)</td>
<td>$153.39</td>
</tr>
<tr>
<td>LaGuardia Airport - New York (LGA)</td>
<td>$134.10</td>
</tr>
<tr>
<td>Philadelphia International Airport (PHL)</td>
<td>$118.38</td>
</tr>
<tr>
<td>Detroit Metropolitan Airport (DTW)</td>
<td>$115.37</td>
</tr>
<tr>
<td>Fort Lauderdale-Hollywood International Airport (FLL)</td>
<td>$109.91</td>
</tr>
<tr>
<td>Baltimore-Washington International Airport (BWI)</td>
<td>$102.30</td>
</tr>
<tr>
<td>San Diego International Airport (SAN)</td>
<td>$ 80.84</td>
</tr>
<tr>
<td>Portland International Airport (PDX)</td>
<td>$ 78.60</td>
</tr>
<tr>
<td>Tampa International Airport (TPA)</td>
<td>$ 78.58</td>
</tr>
<tr>
<td>Ronald Reagan Washington National Airport (DCA)</td>
<td>$ 80.24</td>
</tr>
<tr>
<td>Dallas Love Field (DAL)</td>
<td>$ 58.10</td>
</tr>
<tr>
<td>Nashville International Airport (BNA)</td>
<td>$ 50.65</td>
</tr>
<tr>
<td>William P. Hobby Airport - Houston (HOU)</td>
<td>$ 49.19</td>
</tr>
<tr>
<td>Austin-Bergstrom International Airport (AUS)</td>
<td>$ 47.59</td>
</tr>
<tr>
<td>Norman Y. Mineta San José International Airport (SJC)</td>
<td>$ 42.08</td>
</tr>
</tbody>
</table>
• John Wayne Airport - Orange County, CA (SNA): $39.05 million
• Louis Armstrong New Orleans International Airport (MSY): $38.80 million
• Sacramento International Airport (SMF): $37.51 million
• Indianapolis International Airport (IND): $33.38 million
• Pittsburgh International Airport (PIT): $31.21 million
• Charlotte Douglas International Airport (CLT): n/a

**40.2 Market Leaders**

According to the 2016 Directory of Chain Restaurant Operators, published by Chain Store Guide (www.chainstoreguide.com), there are 165 restaurant companies operating in airports. Among them, the following are the largest:

• Anton Airfood Inc. (www.airfood.com)
• CA One Services (www.delawarenorth.com)
• Concessions International (www.cintl.com)
• Delaware North Cos. (www.delawarenorth.com)
• HMSHost (www.hmshost.com)
• SSP America (www.foodtravelexperts.com)
GQ (August 2017) 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)

The 2016 Reader’s Choice Survey, by USA Today, ranked the top 10 in the Best Airport for Dining category as follows:

- Long Beach Airport
- Denver International Airport
- Toronto Pearson International Airport
- Dallas/Fort Worth International Airport
- San Francisco International Airport
- George Bush Intercontinental Airport (Houston, TX)
- Minneapolis-Saint Paul International Airport
- LaGuardia Airport (New York, NY)
- John F. Kennedy International Airport
- Miami 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)
40.4 Market Resources
41

FOOD CONCESSIONS AT SPORTS VENUES

41.1 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.”

Bloomberg Businessweek

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. SportsBusiness Journal reports food and beverage spending as follows:

<table>
<thead>
<tr>
<th>Event</th>
<th>Per Cap</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Super Bowl XLVIII (2014): MetLife Stadium (East Rutherford, NJ)</td>
<td>$94.50</td>
<td>$7.8 million</td>
</tr>
<tr>
<td>Super Bowl XLIX (2015): University of Phoenix Stadium (Glendale, AZ)</td>
<td>$72.14</td>
<td>$5.0 million</td>
</tr>
<tr>
<td>Super Bowl 50 (2016): Levi’s Stadium (Santa Clara, CA)</td>
<td>$87.57</td>
<td>$6.2 million</td>
</tr>
</tbody>
</table>
The totals include some catered functions on plazas and an adjacent park as well as general concessions and premium dining at the stadium.

### 41.2 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>
<td>Centerplate (<a href="http://www.centerplate.com">www.centerplate.com</a>):</td>
<td>21.6%</td>
<td>16.0%</td>
</tr>
<tr>
<td>Levy Restaurants (<a href="http://www.levyrestaurants.com">www.levyrestaurants.com</a>):</td>
<td>14.9%</td>
<td>21.3%</td>
</tr>
<tr>
<td>Legends Hospitality (<a href="http://www.legends.net">www.legends.net</a>):</td>
<td>4.1%</td>
<td>4.0%</td>
</tr>
<tr>
<td>Others:</td>
<td>8.1%</td>
<td>13.3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Arenas</th>
<th>General</th>
<th>Premium</th>
</tr>
</thead>
<tbody>
<tr>
<td>Levy Restaurants (<a href="http://www.levyrestaurants.com">www.levyrestaurants.com</a>):</td>
<td>41.3%</td>
<td>47.9%</td>
</tr>
<tr>
<td>Aramark (<a href="http://www.aramark.com">www.aramark.com</a>):</td>
<td>30.4%</td>
<td>20.8%</td>
</tr>
<tr>
<td>Delaware North Sportservice (<a href="http://www.delawarenorth.com">www.delawarenorth.com</a>):</td>
<td>13.0%</td>
<td>10.4%</td>
</tr>
<tr>
<td>Centerplate (<a href="http://www.centerplate.com">www.centerplate.com</a>):</td>
<td>6.5%</td>
<td>6.3%</td>
</tr>
<tr>
<td>Savor (<a href="http://www.savormg.com">www.savormg.com</a>):</td>
<td>6.5%</td>
<td>6.3%</td>
</tr>
<tr>
<td>Others:</td>
<td>2.2%</td>
<td>8.3%</td>
</tr>
</tbody>
</table>

### 41.3 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)

“[Concession] food has steadily been improving. In professional sports, baseball has led the way, driven in part by 22 major league stadiums that have been built since 1990. Although staples like hot dogs, pizza, and popcorn still make up about two-thirds of food sales at sports stadiums, baseball menus have matured to include gochugang-glazed eggplant buns, fresh Dungeness crab sandwiches, ceviche, espresso, and craft beer. Football has lagged behind baseball largely because the sports are different, people in the concession business say. Baseball is played at a slower pace with built-in breaks that allow fans to wander around a stadium sampling food. The crowds are smaller, and stadiums are open for about 80 games per season, which makes it easier to polish and sustain creative concessions. Football is a different beast. Crowds can top 80,000 fans, most of whom want to be in their seats for every play and visit concession stands only before the game and at halftime. With just eight regular home games a season, it’s hard to create a system that produces consistently great food.”

The New York Times, 1/30/17
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’s 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)

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

Hot dogs remain a favorite at ball parks. The Hot Dog & Sausage Council
(www.hot-dog.org) estimated that 19.0 million hot dogs were consumed in major league stadiums during the 2017 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
42 FOOD COURTS

42.1 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

42.2 Market Assessment

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

42.3 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.

42.4 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. Likewise, food courts at service plazas have been viewed as serving a captive audience and with 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 2016.

42.5 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)

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

43.1 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.

“Unlike food courts made up of fast food chains, food halls typically mix local artisan restaurants, butcher shops and other food-oriented boutiques under one roof. Many celebrate quirkiness versus uniformity, and their ability to draw crowds is particularly appealing to landlords battling the growth of e-commerce and changing shopping habits. Food halls have been around for years, especially in Europe. The concept is becoming increasingly popular in the United States as consumers demand healthier and better-tasting quick casual food options in entertaining environments.”

The New York Times, 9/12/17

43.2 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.

There were approximately 100 food halls across the U.S. at year-end 2016.

### 43.3 List of Food Halls

- 4th Street Market (Santa Ana, CA; www.4thstreetmarket.com)
- Anaheim Packing House (Anaheim, CA; http://anaheimpackingdistrict.com/packing-house)
- Avanti Food & Beverage (Denver, CO; www.avantifandb.com)
- Belvedere Square Market (Baltimore, MD; www.belvederesquare.com)
- Block 37 (Chicago, IL; www.blockthirtyseven.com)
- Bourdain Market at Pier 57 (New York, NY; www.bourdainmarket.com)*
- Central Table (St. Louis, MO; www.centraltablestl.com)
- Chelsea Market (New York, NY; www.chelseamarket.com)
- Chicago French Market (Chicago, IL; www.frenchmarketchicago.com)
- Chophouse Row (Seattle, WA; www.chophouserow.com)
- Cigar Factory (Charleston, SC; www.cigarfactorycharleston.com)
- City Kitchen (New York, NY; www.citykitchen.rowny.com)
- Dean and Deluca (New York, NY; www.deananddeluca.com)
- Eataly (New York, NY and Chicago, IL; www.eataly.com)
- EatZi's Market & Bakery (Dallas, TX; www.eatzis.com)
- EXPO Market (Buffalo, NY www.expobuffalo.com)
- Faneuil Hall Marketplace (Boston, MA; www.faneuilhallmarketplace.com)
- Farmers Market, The Original (Los Angeles, CA; www.farmersmarketla.com)
- Findlay Market (Cincinnati, OH; www.findlaymarket.org)
- Foodlife (Chicago, IL; www.foodlifechicago.com)
- Gansevoort Market (Cincinnati, OH; www.gansevoortmarket.com)
- Gotham West Market (New York, NY; www.gothamwestmarket.com),
- Grand Central Market (Los Angeles, CA; www.grandcentralmarket.com)
- Grand Central Terminal Dining Concourse (New York, NY; www.grandcentralterminal.com/dining)
- Hudson Eats (New York, NY; http://brookfieldplaceny.com/directory/food)
- Industry City (Brooklyn, NY; www.industrycity.com)
- James Beard Public Market (Seattle, WA; http://jamesbeardmarket.com)*
- Krog Street Market (Atlanta, GA; www.krogstreetmarket.com)
- Latinicity Food Hall and Lounge (Chicago, IL; www.latinicity.com)
- La Centrale (Miami, FL; www.lacentralemiami.com)
- Le District (New York, NY; www.ledistrict.com)
- Liberty Public Market (San Diego, CA; www.libertypublicmarket.com)
- Locale Market (St. Petersburgh, FL; www.localegourmetmarket.com)
• Maketto (Washington, DC; www.maketto1351.com)
• Melrose Market (Seattle, WA; www.melrosemarketseattle.com)
• Midtown Global Market (Minneapolis, MN; www.midtownglobalmarket.org)
• Milwaukee Public Market (Milwaukee, WI; www.milwaukeepublicmarket.org)
• Morgan Street Food Hall & Market (Raleigh, NC; www.morganfoodhall.com)
• Mount Vernon Marketplace (Baltimore, MD; www.mtvvernonmarketplace.com)
• North Market (Columbus, OH; www.northmarket.com)
• Pearl Brewery (San Antonio, CA; www.atpearl.com)
• Pike Place Market (Seattle, WA; www.pikeplacemarket.org)
• Pine Street Market (Portland, OR; www.pinestreetmarketpdx.com)
• Pittsburgh Public Market (Pittsburgh, PA; www.pittsburghpublicmarket.org)
• Pizitz Food Hall (Birmingham, AL; www.thepizitz.com/food-hall/)
• Plaza Food Hall (New York, NY; www.theplazany.com/dining/foodhall)
• Ponce City Market (Atlanta, GA; www.poncecitymarket.com)
• Portland Mercado (Portland, OR; www.portlandmercado.org)
• R. House (Baltimore, MD; http://r.housebaltimore.com)
• Reading Terminal Market (Philadelphia, PA; www.readingterminalmarket.org)
• Revival Food Hall (Chicago, IL; www.revivalfoodhall.com)
• Ferry Building Marketplace (San Francisco, CA; www.ferrybuildingmarketplace.com)
• Smorgasburg (Brooklyn, NY; www.smorgasburg.com)
• St. Roch Market (New Orleans, LA; www.strochmarket.com)
• Swan’s Market (Oakland, CA; www.swansmarket.com)
• The Barlow (Sebastopol, CA; www.thebarlow.net)
• The Bowery Market (New York, NY; www.thebowerymarket.com)
• The Brentwood Country Mart (Los Angeles, CA; www.brentwoodcountymart.com)
• The Canteen (Atlanta, GA; www.thecanteenatl.com)
• The Great Northern Food Hall (New York, NY; www.
• The Hall (San Francisco, CA; www.thehallsf.com)
• The Marketplace at The National (Chicago, IL; www.
• The Market Hall; Dallas, TX; www.themarkethall.com)*
• The Market Hall (San Diego, CA; www.themarkethall.com)
• The Market Hall (San Francisco; CA; www.themarkethall.com)
• The Market Hall (Seattle, WA; www.themarkethall.com)
• The Pennsy (New York, NY; www.thepensy.nyc)
• The Pizitz (Birmingham, AL; www.thepizitz.com/food-hall/)
• The Source (Denver, CO; www.thesourcedenver.com)
• TurnStyle Underground Market (New York, NY; www.turn-style.com)
• Union Market (Tustin, CA; www.unionmarkettustin.com)
• Union Market (Washington, DC; www.unionmarketdc.com)
• Union Fare (New York, NY; www.unionfare.com)
• West Side Market (Cleveland, OH; www.westsidemarket.org)
• Whitehall Mill (Baltimore, MD; www.whitehallmillbaltimore.com)
• Workshop (Charleston, SC; www.workshopcharleston.com)

* opening in 2018 or 2019
“There’s no denying that city-block-sized food halls – essentially fancy mall-less food courts – are among the hottest trends in the food world.”

*American Way, 8/17*
44.1 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 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.

“Within the food industry, the food-truck business, built on unique dishes, low prices and clever use of social media, is the fastest-growing segment.”

_The Economist, 5/6/17_

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.

### 44.2 City-by-City Assessment

Roaming Hunger (www.roaminghunger.com) assessed the number of food trucks in major metropolitan areas as follows:

<table>
<thead>
<tr>
<th>City</th>
<th>Total</th>
<th>No. per 100,000 Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atlanta, GA</td>
<td>78</td>
<td>17.5</td>
</tr>
<tr>
<td>Austin, TX</td>
<td>156</td>
<td>18.5</td>
</tr>
<tr>
<td>Boston, MA</td>
<td>59</td>
<td>9.3</td>
</tr>
<tr>
<td>Chicago, IL</td>
<td>80</td>
<td>3.0</td>
</tr>
<tr>
<td>Cleveland, OH</td>
<td>39</td>
<td>10.0</td>
</tr>
<tr>
<td>Columbus, OH</td>
<td>52</td>
<td>6.4</td>
</tr>
<tr>
<td>Dallas, TX</td>
<td>103</td>
<td>8.3</td>
</tr>
<tr>
<td>Denver, CO</td>
<td>113</td>
<td>17.8</td>
</tr>
<tr>
<td>Honolulu, HI</td>
<td>44</td>
<td>11.7</td>
</tr>
<tr>
<td>Houston, TX</td>
<td>97</td>
<td>4.5</td>
</tr>
<tr>
<td>Indianapolis, IN</td>
<td>70</td>
<td>8.4</td>
</tr>
<tr>
<td>Kansas City, MO</td>
<td>34</td>
<td>7.3</td>
</tr>
<tr>
<td>Las Vegas, NV</td>
<td>52</td>
<td>8.7</td>
</tr>
<tr>
<td>Los Angeles, CA</td>
<td>269</td>
<td>6.9</td>
</tr>
<tr>
<td>Miami, FL</td>
<td>140</td>
<td>33.8</td>
</tr>
<tr>
<td>Minneapolis, MN</td>
<td>87</td>
<td>26.1</td>
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<tr>
<td>Nashville, TN</td>
<td>66</td>
<td>10.6</td>
</tr>
<tr>
<td>New York, NY</td>
<td>110</td>
<td>1.3</td>
</tr>
<tr>
<td>New Orleans, LA</td>
<td>32</td>
<td>8.7</td>
</tr>
<tr>
<td>Orange County, CA</td>
<td>66</td>
<td>2.1</td>
</tr>
<tr>
<td>Orlando, FL</td>
<td>94</td>
<td>37.7</td>
</tr>
<tr>
<td>Philadelphia, PA</td>
<td>81</td>
<td>5.2</td>
</tr>
<tr>
<td>Phoenix, AZ</td>
<td>59</td>
<td>4.0</td>
</tr>
<tr>
<td>Portland, OR</td>
<td>51</td>
<td>8.5</td>
</tr>
<tr>
<td>Sacramento, CA</td>
<td>39</td>
<td>8.2</td>
</tr>
</tbody>
</table>
• San Antonio, TX: 61 4.4
• San Diego, CA: 75 5.6
• San Francisco, CA: 127 15.1
• San Jose, CA: 71 7.2
• Seattle, WA: 71 11.1
• Tampa, FL: 51 14.7
• Washington, DC: 172 22.6

44.3 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.

Influenced by a powerful restaurant industry, Chicago prohibits food trucks from setting up shop within 200 feet of a bricks-and-mortar eatery or from parking in any one location for more than two hours. Vendors are required to carry GPS devices that record their whereabouts every five minutes. Despite being home to more than 7,000 restaurants and 144 craft breweries, Chicago has just 70 licensed food trucks.

In Boston vendors must compete for space on public roads at specified places and times through an annual lottery. In New York a vendor must obtain a two-year government permit, which requires a 15-year waiting list or as much as $25,000 to rent a permit via the black market.

“The Windy City may be the least food-truck-friendly place in America but New York and Boston are little better.”

The Economist, 5/6/17

44.4 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. But, overall, the impact on restaurants has been minimal.

“Restaurants fret about an army of trucks stealing customers but such concerns are unwarranted. According to the Bureau of Labor Statistics (www.bls.gov), counties that have experienced higher growth in mobile-food services have also had quicker growth in their restaurant and catering businesses.”

The Economist, 5/6/17

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

44.5 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 2017 is as follows:

1. Food Fix Original Food Creations (Modesto, CA)
2. Oink and Moo (various locations in New Jersey)
3. Bite into Maine (Cape Elizabeth, ME)
4. Sweet Box Cupcakes (Philadelphia, PA)
5. The Cinnamon Snail (New York, NY and various locations in New Jersey)
6. Pink Bellies (Charleston, SC)
7. Fukuburger Truck (Las Vegas, NV)
8. The Creperie at Temple (Philadelphia, PA)
9. Cucina Zapata (Philadelphia, PA)
10. Mama’s Meatballs (Philadelphia, PA)
11. Ms. Cheezious Fresh Made Grilled Cheese (Miami, FL)
12. King of Pops (Atlanta, GA)
14. Sushi Fix (Minneapolis-Saint Paul, MN)
15. Foolish Waffles (Philadelphia, PA)
16. Where Ya At Matt (Seattle, WA)
17. The Fat Shallot (Chicago, IL)
18. Marination Mobile (Seattle, WA)
19. Rigatoni’s Mobile Crab Cakes (Prospect Park, PA)
20. Sugar Philly Truck (Philadelphia, PA)
21. Guerrilla Street Food (St. Louis, MO)
22. Easy Slider (Dallas, TX)
23. Taim Mobile (New York, NY)
24. Go Gyro Go (St. Louis, MO)
25. Polkadot Cupcake Shop (Nutley, NJ)
26. Chewy’s (Philadelphia, PA)
27. Basic Kneads Pizza (Denver, CO)
28. Nosh The Truck (Seattle, WA)
29. Culinergy Cruzer (Elk Grove, CA)
30. Mei Mei Boston (Boston, MA)
31. Roti Rolls (Charleston, SC)
32. Homegrown Smoker Vegan BBQ (Portland, OR)
33. Chef Ray’s Street Eats (Oklahoma City, OK)
34. Bacon Bacon (San Francisco, CA)
35. The Chairman (San Francisco, CA)
36. Emerson Fry Bread (Phoenix, AZ)
37. Barrio (Cleveland, OH)
38. Mac Mart Truck (Philadelphia, PA)
39. The Grilled Cheeserie (Nashville, TN)
40. Korilla BBQ (New York, NY)
41. Yeti Dogs (Anchorage, AK)
42. The Cow and the Curd (Philadelphia, PA)
43. El Camión (Seattle, WA)
44. Wok n Roll Food Truck (Cleveland, CA)
45. Smoke Et Al (Nashville, TN)
46. Two for the Road (San Diego, CA)
47. Clover Food Lab (Boston, MA)
48. Crepes Bonaparte (Los Angeles, CA)
49. Roxy’s Gourmet Grilled Cheese (Boston, MA)
50. Red Hook Lobster Pound (New York, NY and Washington, DC)
51. Arepa Zone (Washington, DC)
52. Bernie’s Burger Bus (Houston, TX)
53. Bon Me (Boston, MA)
54. Chef Shack (Minneapolis-Saint Paul, MN)
55. Hard Times Sundaes (Brooklyn, NY)
56. Seoul Taco (St. Louis, MO)
57. Oh My Gogi! BBQ (Houston, TX)
58. East Side King (Austin, TX)
59. Guerrilla Tacos (Los Angeles, CA)
60. Fired Up Taco Truck (Cleveland, OH)
61. Moty’s Grill (Miami, FL)
62. The Bacon Truck (Boston, MA)
63. El Guapo (Detroit, MI)
64. La Cocinita (New Orleans, LA)
65. The Jolly Pig (Baltimore, MD)
66. Munch Mobile (Boston, MA)
67. Riffs Fine Street Food (Nashville, TN)
68. Daddy's Bonetown Burgers (Boston, MA)
69. PEPE (Washington, DC)
70. Mannino’s Cannoli Express (various locations in New Jersey)
71. Plouf Plouf Gastronomie (Providence, RI)
72. Waffle Love (Salt Lake City, UT)
73. The Grilled Cheese Grill (Portland, OR)
74. Vellee Deli (Minneapolis-Saint Paul, MN)
75. Kapow (Wilmington, DE)
76. Urban Sugar (Portland, ME)
77. Giovanni’s Shrimp Truck (Oahu, HI)
78. The Taco Truck (various locations in New Jersey)
79. Kogi BBQ (Los Angeles, CA)
80. Cousins Maine Lobster (Los Angeles, CA)
81. Babycakes (Chicago, IL)
82. Lobsta Truck (Los Angeles and San Francisco, CA)
83. Cupcake Carnivale (Philadelphia, PA and various locations in New Jersey)
84. South Philly Experience (Los Angeles, CA)
85. Baby’s Badass Burgers (Los Angeles, CA)
86. Surf and Turf Truck (Philadelphia, PA)
87. Grilled Cheese Truck (Los Angeles, CA)
88. Border Grill (Los Angeles, CA)
89. Ssahm BBQ (Dallas, TX)
90. The Blaxican (Atlanta, GA)
91. Bacon Mania (Orange County, CA)
92. Aloha Plate (Honolulu, HI)
93. Komodo Truck (Los Angeles, CA)
94. Aroy-D, The Thai Elephant (various locations in New Jersey)
95. Mariscos German (San Diego, CA)
96. Urban Street Grill (Greensboro, NC)
97. AZ Canteen (Minneapolis-Saint Paul, MN)
98. Butter Truck (Philadelphia, PA)
99. The Caseus Cheese Truck (various locations in Connecticut)
100. Seoufull Philly (Philadelphia, PA)
101. Five Sisters Catering (various locations in New Jersey)

44.6 Market Resources
Roaming Hunger provides a directory of food trucks in 37 metropolitan areas at www.roaminghunger.com

The Daily Meal, 156 5th Avenue, Suite 400, New York, NY 10010. (www.thedailymeal.com)
45

PIZZERIAS

45.1 Market Assessment
Over three billion pizzas were sold in the United States in 2016, according to the National Association of Pizza Operators (NAPO, www.pizzatoday.com).

Nation’s Restaurant News estimated the pizza business in 2016 at $35.5 billion. Including casual dining restaurants that serve Italian cuisine as well as pizza, 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 $13 billion. Independents have a 56% marketshare; large chains garner 30.5% of the market.

Twenty-three (23) pizza chains rank among the 250 largest U.S. restaurant chains, according to Restaurant Business (June 2017). Their combined annual sales are $23.1 billion.

In 2016, there were 76,723 pizzerias in the United States, according to Statistica (www.statistica.com), a 2.6% increase from the prior year.

Pizza consumption is assessed in Section 26.9 of this handbook.

45.2 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

45.3 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. The chain’s 2016 sales were $5.47 billion.

According to Nation’s Restaurant News, approximately one-half of Pizza Hut orders come in through digital channels, with 60% of those coming from a mobile device.

Papa John’s receives more than 60% of orders via its digital platforms, mostly from its mobile ordering app.

Digital orders are further assessed in Section 83.4 of this handbook.

45.4 Fast-Casual Pizza Chains
Several pizza chains operating in a fast-casual format have recently launched.
These include Blaze 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 segment was among the fastest-growing in the entire restaurant industry in 2014 and 2015. The segment became saturated in 2016 and growth slowed.

“Two years ago, it seemed that everyone and his brother had started or was planning to debut a fast-casual pizza concept. The build-your-own pizza format of individual pies quickly cooked in high-temperature ovens had become one of the hottest niches within the restaurant industry, with a multitude of players vying to become ‘the Chipotle Mexican Grill of pizza.’ But roughly eight years after the first fast-casual pizza brands emerged, the frenzy of new launches has slowed to a trickle and the niche is showing signs of saturation. A handful of chains have emerged as clear leaders, gaining strength and battling for marketshare, while others close restaurants or disappear.”

Nation’s Restaurant News, 12/12/16

45.5 Customer Priorities

Surveys conducted 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%

45.6 Market Resources
National Association of Pizza Operators, 908 South 8th Street, Suite 200, Louisville, KY 40203. (502) 736-9500.
(www.pizzatoday.com/napo/national-association-for-pizzeria-operators)
QUICK-SERVICE RESTAURANTS

46.1 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%.

46.2 Market Assessment

The National Restaurant Association (www.restaurant.org) assesses quick-service restaurant sales in 2017 at $233.7 billion, a 5.3% increase over the previous year.


Eighty-seven (87) quick-service chains rank among the 250 largest U.S. restaurant chains, according to Restaurant Business (June 2017). Their combined annual sales are $187.6 billion.

46.3 The QSR Customer

According to the 2017 Value & Pricing Consumer Trend Report, by Technomic (www.technomic.com), more consumers now (58%) than in 2015 (52%) are highly satisfied with the value for money spent at fast-food restaurants.

Understanding Quick-Service Restaurants and Their Customers, by Technomic, provides the following profile of QSR customers:
• QSR patronage tends to peak with the 25-to-34 age group, then decrease with each age cohort.
• Eighty-two percent (82%) of QSR consumers rate the food quality at their recent visits as good or very good.
• Consumers form opinions about products and services whether they have had first-hand experience or not. Sixty-six percent (66%) of consumers feel that the average QSR is good or very good at emotional connection; and 58% say the same of brand image.
• Eighty percent (80%) of adults say they are willing to recommend the QSRs that they rate highly to friends and family.

A study by Sandelman & Associates assessed metropolitan areas for quick-service dining frequency. The following metropolitan areas are identified as having the highest percentages of adults who eat fast-food 20 or more times per month:
• Dallas, TX: 44.0%
• 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%

46.4 Customer Priorities
According to The NPD Group, 26% of all QSR meal occasions are deal-driven purchases; 35% are deal-driven at quick-service burger chains.

“When it comes to quick-service dinner, price drives 25% of consumer visits, food variety and quality drives 13% of visits, and ‘treating myself’ drives 11% of visits. The trend is similar at lunchtime.”

Nation’s Restaurant News, 5/8/17

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

<table>
<thead>
<tr>
<th></th>
<th>16-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-64</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshness of ingredients:</td>
<td>80%</td>
<td>79%</td>
<td>85%</td>
<td>89%</td>
</tr>
<tr>
<td>Ability to prepare food at my direction:</td>
<td>72%</td>
<td>75%</td>
<td>68%</td>
<td>64%</td>
</tr>
<tr>
<td>Humane farming practices:</td>
<td>52%</td>
<td>51%</td>
<td>46%</td>
<td>41%</td>
</tr>
<tr>
<td>Ease of access to nutritional information:</td>
<td>48%</td>
<td>51%</td>
<td>45%</td>
<td>33%</td>
</tr>
<tr>
<td>Community involvement:</td>
<td>37%</td>
<td>44%</td>
<td>41%</td>
<td>34%</td>
</tr>
</tbody>
</table>
47.1 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.

*Consumer Reports* estimates that prepared meals purchased from grocery stores were a $29 billion business in 2016.

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%

Visits to grocery stores for in-store dining or take-out prepared foods have grown 30% since 2008, according to The NPD Group.

_________________________________________________________________

“We have so many options. It’s just one more thing cutting into consumers’ restaurant visits. It’s a battle for market share, and it looks like some of the non-food concepts are winning.”

Bonnie Riggs, Analyst
The NPD Group
*Nation’s Restaurant News*, 5/9/16
47.2 The Prepared Food Customer
In a 2016 assessment, The NPD Group found that more than 40% of the population purchased prepared foods from a grocery store over a 10-month period; compared to 77% that made purchases from a quick-service restaurant. In a four-week period, consumers made an average of five visits to a grocery store for prepared foods, compared to about 14 visits to quick-service restaurants.

“While the purchase rate at grocery stores lags behind quick-service eateries, it is still impressive, given that grocery has significantly fewer locations than quick service.”

Bonnie Riggs, Analyst
The NPD Group
Nation’s Restaurant News, 5/9/16

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
Perhaps the most concerning research for quick-service restaurant operators is that grocery outlets are going after their best customers, NPD found. According to The NPD Group’s QSR Plus Retail Market Monitor, grocery prepared-food buyers are above-average quick-service restaurant users. In addition, the heaviest grocery buyers account for nearly 30% of grocery visits (about seven per month) for ready-to-eat meals.

47.3 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.

In 2016, Kroger Co. opened its first Main & Vine store (Gig Harbor, WA) focused on fresh produce and prepared foods at affordable prices. The 27,000-sq. ft. store offers four different stations for prepared foods where customers can order and then take out or eat in the cafe. Selections include build-your-own bento boxes and dumplings, oven-baked hand tossed pizza, made-to-order salads, and sandwiches made with in-house roasted meats. There is also an event center for food and beverage tastings, cooking demonstrations, and more.

Other grocery brands operating on-premise full-service restaurants include Bristol Farms, Buehler’s, and Lunds/Byerly’s.

47.4 Outlook

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%. This growth will have groceries firmly planted in the restaurant marketplace.
“With the line between food segments growing murkier, in the next 50 years – maybe sooner – there will be no difference between supermarkets and restaurants.”

Nation’s Restaurant News, 12/12/16
PART VII: MARKET LEADERS
48.1 Overview
Technomic (www.technomic.com) annually ranks the largest 500 restaurant chains based on U.S. systemwide sales. Systemwide sales include sales from both corporate-owned and franchised locations. Among these chains, 94% of revenues and 93% of units are from the Top 250.

Restaurant Business publishes Technomic’s Top 250 list annually in the June issue.

“While 2016 was a rough year for chain restaurants, more than half of the industry’s $521.9 billion still comes from the Top 500 chains.”

Restaurant Business, 6/17

48.2 Largest Chains
The largest restaurant chains, ranked by U.S. systemwide sales, are as follows (source: Restaurant Business, June 2017):

<table>
<thead>
<tr>
<th>Rank</th>
<th>Chain</th>
<th>Sales</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>McDonald’s:</td>
<td>$36.38 billion</td>
<td>14,155</td>
</tr>
<tr>
<td>2.</td>
<td>Starbucks:</td>
<td>$14.67 billion</td>
<td>13,172</td>
</tr>
<tr>
<td>3.</td>
<td>Subway:</td>
<td>$11.30 billion</td>
<td>26,744</td>
</tr>
<tr>
<td>4.</td>
<td>Burger King:</td>
<td>$ 9.43 billion</td>
<td>7,161</td>
</tr>
<tr>
<td>5.</td>
<td>Taco Bell:</td>
<td>$ 9.35 billion</td>
<td>6,278</td>
</tr>
<tr>
<td>6.</td>
<td>Wendy’s:</td>
<td>$ 8.96 billion</td>
<td>5,739</td>
</tr>
<tr>
<td>7.</td>
<td>Dunkin’ Donuts:</td>
<td>$ 8.22 billion</td>
<td>8,828</td>
</tr>
<tr>
<td>8.</td>
<td>Chick-fil-A:</td>
<td>$ 6.74 billion</td>
<td>2,062</td>
</tr>
<tr>
<td>9.</td>
<td>Pizza Hut:</td>
<td>$ 5.75 billion</td>
<td>7,689</td>
</tr>
<tr>
<td>Rank</td>
<td>Restaurant</td>
<td>Revenue</td>
<td>Stores</td>
</tr>
<tr>
<td>------</td>
<td>------------------------------------------</td>
<td>-----------</td>
<td>--------</td>
</tr>
<tr>
<td>10.</td>
<td>Domino’s</td>
<td>$5.47 billion</td>
<td>5,371</td>
</tr>
<tr>
<td>11.</td>
<td>Panera Bread/Saint Louis Bread Co.:</td>
<td>$5.13 billion</td>
<td>2,017</td>
</tr>
<tr>
<td>12.</td>
<td>Sonic Drive-In:</td>
<td>$4.51 billion</td>
<td>3,557</td>
</tr>
<tr>
<td>13.</td>
<td>KFC:</td>
<td>$4.48 billion</td>
<td>4,167</td>
</tr>
<tr>
<td>14.</td>
<td>Applebee’s:</td>
<td>$4.41 billion</td>
<td>1,857</td>
</tr>
<tr>
<td>15.</td>
<td>Olive Garden:</td>
<td>$3.86 billion</td>
<td>840</td>
</tr>
<tr>
<td>16.</td>
<td>Chipotle Mexican Grill:</td>
<td>$3.82 billion</td>
<td>2,198</td>
</tr>
<tr>
<td>17.</td>
<td>Little Caesars:</td>
<td>$3.80 billion</td>
<td>4,388</td>
</tr>
<tr>
<td>18.</td>
<td>Buffalo Wild Wings:</td>
<td>$3.78 billion</td>
<td>1,187</td>
</tr>
<tr>
<td>19.</td>
<td>Arby’s:</td>
<td>$3.66 billion</td>
<td>3,237</td>
</tr>
<tr>
<td>20.</td>
<td>Chili’s Grill &amp; Bar:</td>
<td>$3.63 billion</td>
<td>1,259</td>
</tr>
<tr>
<td>21.</td>
<td>Dairy Queen/Orange Julius:</td>
<td>$3.62 billion</td>
<td>4,517</td>
</tr>
<tr>
<td>22.</td>
<td>Jack in the Box:</td>
<td>$3.46 billion</td>
<td>2,255</td>
</tr>
<tr>
<td>23.</td>
<td>IHOP:</td>
<td>$3.22 billion</td>
<td>1,631</td>
</tr>
<tr>
<td>24.</td>
<td>Papa John’s:</td>
<td>$2.93 billion</td>
<td>3,331</td>
</tr>
<tr>
<td>25.</td>
<td>Panda Express:</td>
<td>$2.90 billion</td>
<td>1,893</td>
</tr>
<tr>
<td>26.</td>
<td>Popeyes Louisiana Kitchen:</td>
<td>$2.87 billion</td>
<td>2,067</td>
</tr>
<tr>
<td>27.</td>
<td>Denny’s:</td>
<td>$2.58 billion</td>
<td>1,610</td>
</tr>
<tr>
<td>28.</td>
<td>Outback Steakhouse:</td>
<td>$2.51 billion</td>
<td>755</td>
</tr>
<tr>
<td>29.</td>
<td>Red Lobster:</td>
<td>$2.38 billion</td>
<td>677</td>
</tr>
<tr>
<td>30.</td>
<td>Texas Roadhouse:</td>
<td>$2.33 billion</td>
<td>499</td>
</tr>
<tr>
<td>31.</td>
<td>Cracker Barrel Old Country Store:</td>
<td>$2.32 billion</td>
<td>640</td>
</tr>
<tr>
<td>32.</td>
<td>Hardee’s:</td>
<td>$2.24 billion</td>
<td>1,848</td>
</tr>
<tr>
<td>33.</td>
<td>Jimmy John’s Gourmet Sandwiches:</td>
<td>$2.22 billion</td>
<td>2,620</td>
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<tr>
<td>34.</td>
<td>Whataburger:</td>
<td>$2.18 billion</td>
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</tr>
<tr>
<td>35.</td>
<td>The Cheesecake Factory:</td>
<td>$2.07 billion</td>
<td>194</td>
</tr>
<tr>
<td>36.</td>
<td>Zaxby’s:</td>
<td>$1.71 billion</td>
<td>825</td>
</tr>
<tr>
<td>37.</td>
<td>Golden Corral:</td>
<td>$1.69 billion</td>
<td>482</td>
</tr>
<tr>
<td>38.</td>
<td>LongHorn Steakhouse:</td>
<td>$1.64 billion</td>
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<tr>
<td>39.</td>
<td>Carl’s Jr.:</td>
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<td>1,163</td>
</tr>
<tr>
<td>40.</td>
<td>Red Robin Gourmet Burgers and Brews:</td>
<td>$1.47 billion</td>
<td>533</td>
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<tr>
<td>41.</td>
<td>Five Guys Burgers and Fries:</td>
<td>$1.43 billion</td>
<td>1,284</td>
</tr>
<tr>
<td>42.</td>
<td>TGI Fridays:</td>
<td>$1.36 billion</td>
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<td>Culver’s:</td>
<td>$1.30 billion</td>
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<td>44.</td>
<td>Waffle House:</td>
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<td>Bojangles’ Famous Chicken ‘N Biscuits:</td>
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<td>46.</td>
<td>Ruby Tuesday:</td>
<td>$1.11 billion</td>
<td>673</td>
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<tr>
<td>47.</td>
<td>Steak ‘n Shake:</td>
<td>$1.07 billion</td>
<td>568</td>
</tr>
<tr>
<td>48.</td>
<td>BJ’s Restaurant &amp; Brewhouse:</td>
<td>$993.0 million</td>
<td>189</td>
</tr>
<tr>
<td>49.</td>
<td>Bob Evans:</td>
<td>$951.2 million</td>
<td>527</td>
</tr>
<tr>
<td>50.</td>
<td>Wingstop:</td>
<td>$943.2 million</td>
<td>922</td>
</tr>
<tr>
<td>51.</td>
<td>P.F. Chang’s China Bistro:</td>
<td>$892.0 million</td>
<td>216</td>
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<tr>
<td>52.</td>
<td>Papa Murphy’s Pizza:</td>
<td>$884.7 million</td>
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<tr>
<td>53.</td>
<td>Hooters:</td>
<td>$864.0 million</td>
<td>338</td>
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<tr>
<td></td>
<td>Restaurant Name</td>
<td>Revenue (Million)</td>
<td>Units</td>
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<tr>
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<td>------------------------------</td>
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</tr>
<tr>
<td>54.</td>
<td>Church's Chicken:</td>
<td>$835.0 million</td>
<td>1,163</td>
</tr>
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<td>55.</td>
<td>Jersey Mike's Subs:</td>
<td>$825.0 million</td>
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</tr>
<tr>
<td>56.</td>
<td>In-N-Out Burger:</td>
<td>$807.1 million</td>
<td>325</td>
</tr>
<tr>
<td>57.</td>
<td>Qdoba Mexican Eats:</td>
<td>$805.0 million</td>
<td>695</td>
</tr>
<tr>
<td>58.</td>
<td>El Pollo Loco:</td>
<td>$795.4 million</td>
<td>460</td>
</tr>
<tr>
<td>59.</td>
<td>California Pizza Kitchen:</td>
<td>$762.5 million</td>
<td>232</td>
</tr>
<tr>
<td>60.</td>
<td>Tim Hortons:</td>
<td>$760.0 million</td>
<td>683</td>
</tr>
<tr>
<td>61.</td>
<td>Krispy Kreme:</td>
<td>$758.0 million</td>
<td>307</td>
</tr>
<tr>
<td>62.</td>
<td>Cheddar's Scratch Kitchen:</td>
<td>$751.0 million</td>
<td>165</td>
</tr>
<tr>
<td>63.</td>
<td>Raising Cane’s Chicken Fingers:</td>
<td>$741.0 million</td>
<td>306</td>
</tr>
<tr>
<td>64.</td>
<td>Del Taco:</td>
<td>$738.0 million</td>
<td>551</td>
</tr>
<tr>
<td>65.</td>
<td>Carrabba’s Italian Grill:</td>
<td>$707.0 million</td>
<td>244</td>
</tr>
<tr>
<td>66.</td>
<td>Jason’s Deli:</td>
<td>$702.1 million</td>
<td>260</td>
</tr>
<tr>
<td>67.</td>
<td>Moe’s Southwest Grill:</td>
<td>$698.0 million</td>
<td>680</td>
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<td>68.</td>
<td>Firehouse Subs:</td>
<td>$683.5 million</td>
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<td>69.</td>
<td>Ruth’s Chris Steak House:</td>
<td>$668.0 million</td>
<td>129</td>
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<tr>
<td>70.</td>
<td>Perkins Restaurant &amp; Bakery:</td>
<td>$635.0 million</td>
<td>380</td>
</tr>
<tr>
<td>71.</td>
<td>Boston Market:</td>
<td>$633.4 million</td>
<td>460</td>
</tr>
<tr>
<td>72.</td>
<td>Bonefish Grill:</td>
<td>$630.0 million</td>
<td>210</td>
</tr>
<tr>
<td>73.</td>
<td>Baskin-Robbins:</td>
<td>$603.6 million</td>
<td>2,538</td>
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<td>74.</td>
<td>McAlister’s Deli:</td>
<td>$592.8 million</td>
<td>387</td>
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<tr>
<td>75.</td>
<td>Logan’s Roadhouse:</td>
<td>$587.0 million</td>
<td>220</td>
</tr>
<tr>
<td>76.</td>
<td>White Castle:</td>
<td>$564.2 million</td>
<td>384</td>
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<tr>
<td>77.</td>
<td>Noodles &amp; Company:</td>
<td>$559.0 million</td>
<td>530</td>
</tr>
<tr>
<td>78.</td>
<td>Dickey’s Barbecue Pit:</td>
<td>$557.6 million</td>
<td>544</td>
</tr>
<tr>
<td>79.</td>
<td>Auntie Anne’s:</td>
<td>$547.8 million</td>
<td>1,298</td>
</tr>
<tr>
<td>80.</td>
<td>Jamba Juice:</td>
<td>$547.2 million</td>
<td>828</td>
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<td>81.</td>
<td>Captain D’s Seafood Kitchen:</td>
<td>$543.7 million</td>
<td>515</td>
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<tr>
<td>82.</td>
<td>Checkers Drive-In Restaurants:</td>
<td>$532.4 million</td>
<td>555</td>
</tr>
<tr>
<td>83.</td>
<td>Yard House:</td>
<td>$524.0 million</td>
<td>65</td>
</tr>
<tr>
<td>84.</td>
<td>O’Charley’s:</td>
<td>$502.5 million</td>
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<tr>
<td>85.</td>
<td>Marco’s Pizza:</td>
<td>$488.9 million</td>
<td>770</td>
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<tr>
<td>86.</td>
<td>Long John Silver’s:</td>
<td>$475.4 million</td>
<td>950</td>
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<tr>
<td>87.</td>
<td>Dave &amp; Buster’s:</td>
<td>$450.0 million</td>
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<tr>
<td>88.</td>
<td>Potbelly Sandwich Shop:</td>
<td>$445.9 million</td>
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<tr>
<td>89.</td>
<td>Round Table Pizza:</td>
<td>$442.5 million</td>
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<td>90.</td>
<td>Famous Dave’s:</td>
<td>$424.0 million</td>
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<td>91.</td>
<td>Cici’s:</td>
<td>$417.0 million</td>
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<td>92.</td>
<td>Krystal Company:</td>
<td>$416.9 million</td>
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<td>93.</td>
<td>The Capital Grille:</td>
<td>$413.0 million</td>
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<tr>
<td>94.</td>
<td>Maggiano’s Little Italy:</td>
<td>$411.8 million</td>
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<td>95.</td>
<td>Chuck E. Cheese’s:</td>
<td>$404.4 million</td>
<td>540</td>
</tr>
<tr>
<td>96.</td>
<td>Pollo Tropical:</td>
<td>$403.7 million</td>
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</tr>
<tr>
<td>97.</td>
<td>Einstein Bros. Bagels:</td>
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<td>395</td>
</tr>
<tr>
<td>Rank</td>
<td>Restaurant</td>
<td>Revenue (Million)</td>
<td>Rank</td>
</tr>
<tr>
<td>------</td>
<td>------------------------------------------------</td>
<td>------------------</td>
<td>------</td>
</tr>
<tr>
<td>98.</td>
<td>Hungry Howie’s Pizza</td>
<td>$378.2 million</td>
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<td>99.</td>
<td>Corner Bakery Cafe</td>
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<tr>
<td>100.</td>
<td>Joe’s Crab Shack</td>
<td>$370.0 million</td>
<td>113.</td>
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<tr>
<td>101.</td>
<td>Jet’s Pizza</td>
<td>$368.4 million</td>
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<tr>
<td>102.</td>
<td>Pei Wei Asian Diner</td>
<td>$365.5 million</td>
<td>214.</td>
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<tr>
<td>103.</td>
<td>Taco John’s</td>
<td>$362.9 million</td>
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<td>Charleys Philly Steaks</td>
<td>$362.5 million</td>
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<td>105.</td>
<td>Cold Stone Creamery</td>
<td>$361.7 million</td>
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<tr>
<td>106.</td>
<td>Village Inn</td>
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<tr>
<td>107.</td>
<td>Miller’s Ale House</td>
<td>$360.0 million</td>
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<tr>
<td>108.</td>
<td>On The Border Mexican Grill &amp; Cantina</td>
<td>$356.3 million</td>
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<tr>
<td>109.</td>
<td>Au Bon Pain</td>
<td>$351.7 million</td>
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<tr>
<td>110.</td>
<td>Mellow Mushroom</td>
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<tr>
<td>111.</td>
<td>Smashburger</td>
<td>$344.0 million</td>
<td>343.</td>
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<tr>
<td>112.</td>
<td>Freddy’s Frozen Custard &amp; Steakburgers</td>
<td>$340.4 million</td>
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<td>Schlotzsky’s</td>
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<td>Twin Peaks</td>
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<tr>
<td>115.</td>
<td>Chuy’s</td>
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<tr>
<td>117.</td>
<td>Braum’s Ice Cream &amp; Dairy Stores</td>
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<tr>
<td>118.</td>
<td>Pappadeaux Seafood Kitchen</td>
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<td>Taco Cabana</td>
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<td>Benihana</td>
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<tr>
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<td>Tropical Smoothie Cafe</td>
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<tr>
<td>122.</td>
<td>Friendly’s</td>
<td>$309.0 million</td>
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<tr>
<td>123.</td>
<td>Portillo’s</td>
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<tr>
<td>124.</td>
<td>Ninety Nine Restaurants</td>
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<tr>
<td>125.</td>
<td>Hard Rock Cafe</td>
<td>$302.3 million</td>
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<tr>
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<td>The Habit Burger Grill</td>
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<tr>
<td>127.</td>
<td>Fleming’s Prime Steakhouse &amp; Wine Bar</td>
<td>$285.0 million</td>
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<td>Smoothie King</td>
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<td>Shake Shack</td>
<td>$280.3 million</td>
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<td>Bar Louie</td>
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<tr>
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<td>Rally’s Hamburgers</td>
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<tr>
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<td>Souplantation &amp; Sweet Tomatoes</td>
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<tr>
<td>134.</td>
<td>Peet’s Coffee &amp; Tea</td>
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<td>Godfather’s Pizza</td>
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<tr>
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<td>Romano’s Macaroni Grill</td>
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<td>137.</td>
<td>Morton’s The Steakhouse</td>
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<tr>
<td>138.</td>
<td>Brio Tuscan Grille</td>
<td>$256.8 million</td>
<td>67.</td>
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<tr>
<td>139.</td>
<td>Old Chicago Pizza &amp; Taproom</td>
<td>$255.1 million</td>
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</tr>
<tr>
<td>140.</td>
<td>Caribou Coffee</td>
<td>$255.0 million</td>
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<tr>
<td>141.</td>
<td>Wienerschnitzel</td>
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<td>RESTAURANT, FOOD &amp; BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019</td>
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<td>---</td>
<td>-------------------------------------------------------------</td>
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</tr>
<tr>
<td>142.</td>
<td>Uno Pizzeria &amp; Grill:</td>
<td>$251.6 million</td>
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<td>Saltgrass Steak House:</td>
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<td>Texas de Brazil Churrascaria:</td>
<td>$247.7 million</td>
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<td>145.</td>
<td>Seasons 52:</td>
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<td>Huddle House:</td>
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<td>Fogo de Chao:</td>
<td>$245.3 million</td>
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<tr>
<td>148.</td>
<td>Bill Miller Bar-B-Q:</td>
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<td>Which Wich Superior Sandwiches:</td>
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<td>Sizzler:</td>
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<td>Fuddruckers:</td>
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<td>152.</td>
<td>Fazoli’s:</td>
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<td>Sonny’s BBQ:</td>
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<td>154.</td>
<td>Big Boy:</td>
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</tr>
<tr>
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<td>Newk’s Eatery:</td>
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<tr>
<td>156.</td>
<td>Pizza Ranch:</td>
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</tr>
<tr>
<td>157.</td>
<td>Rubio’s:</td>
<td>$231.7 million</td>
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<tr>
<td>158.</td>
<td>McCormick &amp; Schmick’s:</td>
<td>$231.4 million</td>
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<tr>
<td>159.</td>
<td>Luby’s:</td>
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<td>160.</td>
<td>Claim Jumper:</td>
<td>$227.5 million</td>
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</tr>
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<td>161.</td>
<td>Quiznos:</td>
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<td>162.</td>
<td>Mimi’s Cafe:</td>
<td>$224.1 million</td>
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<tr>
<td>163.</td>
<td>A&amp;W All-American Food:</td>
<td>$223.0 million</td>
<td>632</td>
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<tr>
<td>164.</td>
<td>Buca di Beppo:</td>
<td>$220.0 million</td>
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<td>Bahama Breeze Island Grille:</td>
<td>$219.0 million</td>
<td>36</td>
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<td>166.</td>
<td>Rainforest Cafe:</td>
<td>$216.0 million</td>
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<td>167.</td>
<td>Legal Sea Foods:</td>
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<td>Bubba Gump Shrimp Co.:</td>
<td>$214.3 million</td>
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<td>169.</td>
<td>Shoney’s:</td>
<td>$210.1 million</td>
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<td>170.</td>
<td>Johnny Rockets:</td>
<td>$207.4 million</td>
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<td>171.</td>
<td>Black Bear Diner:</td>
<td>$205.2 million</td>
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<tr>
<td>172.</td>
<td>Beef ‘O’ Brady’s:</td>
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<td>Mastro’s Restaurants:</td>
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<td>Le Pain Quotidien:</td>
<td>$200.3 million</td>
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</tr>
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<td>175.</td>
<td>Sarku Japan:</td>
<td>$200.1 million</td>
<td>225</td>
</tr>
<tr>
<td>176.</td>
<td>The Coffee Bean &amp; Tea Leaf:</td>
<td>$199.1 million</td>
<td>310</td>
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<td>177.</td>
<td>Penn Station East Coast Subs:</td>
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<td>178.</td>
<td>Dutch Bros. Coffee:</td>
<td>$198.5 million</td>
<td>262</td>
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<td>Houlihan’s:</td>
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<td>180.</td>
<td>Bruegger’s Bagels:</td>
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<td>181.</td>
<td>Cafe Rio Mexican Grill:</td>
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<td>182.</td>
<td>Taco Bueno:</td>
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<td>183.</td>
<td>Jimmy Buffett’s Margaritaville:</td>
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<td>184.</td>
<td>The Melting Pot:</td>
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<td>119</td>
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<td>185.</td>
<td>Sbarro:</td>
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<td>187.</td>
<td>Smokey Bones Bar &amp; Fire Grill:</td>
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<td>188.</td>
<td>Cooper's Hawk Winery &amp; Restaurants:</td>
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<td>la Madeleine Country French Cafe:</td>
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<td>192.</td>
<td>Bertucci's:</td>
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<tr>
<td>193.</td>
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<td>Yogurtland:</td>
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<td>221.</td>
<td>Jack’s:</td>
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<tr>
<td>222.</td>
<td>Fuzzy’s Taco Shop:</td>
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<tr>
<td>223.</td>
<td>Country Pride Restaurant:</td>
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<td>224.</td>
<td>Marie Callender’s Restaurant &amp; Bakery:</td>
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<td>225.</td>
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<td>Rank</td>
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<td>Revenue</td>
<td>Location</td>
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<td>-------------------------------------</td>
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<td>Grand Lux Cafe:</td>
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<td>231</td>
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<td>Roosters:</td>
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<td>234</td>
<td>Mountain Mike’s Pizza:</td>
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<td>Ponderosa/Bonanza:</td>
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<tr>
<td>236</td>
<td>Cantina Laredo:</td>
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<td>237</td>
<td>PDQ:</td>
<td>$130.5 million</td>
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<tr>
<td>238</td>
<td>Great American Cookies:</td>
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<tr>
<td>239</td>
<td>Biggby Coffee:</td>
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<tr>
<td>240</td>
<td>Duffy’s Sports Grill:</td>
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<td>33</td>
</tr>
<tr>
<td>241</td>
<td>Tijuana Flats:</td>
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<td>120</td>
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<td>242</td>
<td>El Torito:</td>
<td>$128.7 million</td>
<td>45</td>
</tr>
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<td>243</td>
<td>WaBa Grill:</td>
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<tr>
<td>244</td>
<td>Villa Fresh Italian Kitchen:</td>
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<td>220</td>
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<tr>
<td>245</td>
<td>Rosati’s Pizza:</td>
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<td>246</td>
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<tr>
<td>247</td>
<td>Wild Wing Cafe:</td>
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<td>44</td>
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<tr>
<td>248</td>
<td>Abuelo’s:</td>
<td>$123.2 million</td>
<td>39</td>
</tr>
<tr>
<td>249</td>
<td>Anthony’s Coal Fired Pizza:</td>
<td>$123.1 million</td>
<td>62</td>
</tr>
<tr>
<td>250</td>
<td>Chart House:</td>
<td>$122.0 million</td>
<td>28</td>
</tr>
</tbody>
</table>

**48.3 Market Resources**

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

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

49.1 Overview

In its annual assessment of the Top 250 restaurants chains, Restaurant Business categorizes restaurant segments as follows:

Type of Service
- Casual Dining
- Family Dining
- Fast-Casual
- Fine Dining
- Quick-Service

Type of Menu
- Asian/Noodle
- Bakery Cafe
- BBQ
- Burger
- Chicken
- Coffee Cafe
- Family Casual
- Family Style
- Frozen Desserts
- Italian/Pizza
- Mexican
- Pizza
- Sandwich
- Seafood
- Sports Bar
- Snack
- Steak
- Varied Menu

49.2 Type of Service

The following are the largest restaurant chains by type of service (source: Restaurant Business, June 2017):
<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Annual Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applebee's:</td>
<td>$ 4.41 billion</td>
</tr>
<tr>
<td>Olive Garden:</td>
<td>$ 3.86 billion</td>
</tr>
<tr>
<td>Buffalo Wild Wings:</td>
<td>$ 3.78 billion</td>
</tr>
<tr>
<td>Chili’s Grill &amp; Bar:</td>
<td>$ 3.63 billion</td>
</tr>
<tr>
<td>Outback Steakhouse:</td>
<td>$ 2.51 billion</td>
</tr>
<tr>
<td>Red Lobster:</td>
<td>$ 2.38 billion</td>
</tr>
<tr>
<td>Texas Roadhouse:</td>
<td>$ 2.33 billion</td>
</tr>
<tr>
<td>The Cheesecake Factory:</td>
<td>$ 2.07 billion</td>
</tr>
<tr>
<td>LongHorn Steakhouse:</td>
<td>$ 1.64 billion</td>
</tr>
<tr>
<td>Red Robin Gourmet Burgers and Brews</td>
<td>$ 1.47 billion</td>
</tr>
<tr>
<td>TGI Fridays:</td>
<td>$ 1.36 billion</td>
</tr>
<tr>
<td>Ruby Tuesday:</td>
<td>$ 1.11 billion</td>
</tr>
<tr>
<td>BJ's Restaurant &amp; Brewhouse:</td>
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</tr>
<tr>
<td>P.F. Chang’s China Bistro:</td>
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</tr>
<tr>
<td>Hooters:</td>
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</tr>
<tr>
<td>California Pizza Kitchen:</td>
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<tr>
<td>Cheddar's Scratch Kitchen:</td>
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</tr>
<tr>
<td>Carrabba’s Italian Grill:</td>
<td>$ 707.0 million</td>
</tr>
<tr>
<td>Bonefish Grill:</td>
<td>$ 630.0 million</td>
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<tr>
<td>Logan’s Roadhouse:</td>
<td>$ 587.0 million</td>
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<tr>
<td>Yard House:</td>
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<tr>
<td>O’Charley’s:</td>
<td>$ 502.5 million</td>
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<tr>
<td>Dave &amp; Buster’s:</td>
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</tr>
<tr>
<td>Famous Dave’s:</td>
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<tr>
<td>Maggiano’s Little Italy:</td>
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<tr>
<td>Joe’s Crab Shack:</td>
<td>$ 370.0 million</td>
</tr>
<tr>
<td>Miller’s Ale House:</td>
<td>$ 360.0 million</td>
</tr>
<tr>
<td>On The Border Mexican Grill &amp; Cantina:</td>
<td>$ 356.3 million</td>
</tr>
<tr>
<td>Mellow Mushroom:</td>
<td>$ 350.6 million</td>
</tr>
<tr>
<td>Twin Peaks:</td>
<td>$ 332.9 million</td>
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<tr>
<td>Chuy’s:</td>
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<tr>
<td>Pappadeaux Seafood Kitchen:</td>
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<tr>
<td>Benihana:</td>
<td>$ 320.0 million</td>
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<tr>
<td>Ninety Nine Restaurants:</td>
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<tr>
<td>Hard Rock Cafe:</td>
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<tr>
<td>Bar Louie:</td>
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<tr>
<td>Romano’s Macaroni Grill:</td>
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<tr>
<td>Brio Tuscan Grille:</td>
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<tr>
<td>Old Chicago Pizza &amp; Taproom:</td>
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<tr>
<td>Uno Pizzeria &amp; Grill:</td>
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</tr>
<tr>
<td>Saltgrass Steak House:</td>
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</tr>
<tr>
<td>Seasons 52:</td>
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</tr>
<tr>
<td>McCormick &amp; Schmick’s:</td>
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</tr>
<tr>
<td>Restaurant Name</td>
<td>Revenue</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>---------------</td>
</tr>
<tr>
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<tr>
<td>Mimi’s Cafe</td>
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<tr>
<td>Buca di Beppo</td>
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<tr>
<td>Bahama Breeze Island Grille</td>
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<tr>
<td>Rainforest Cafe</td>
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<td>Legal Sea Foods</td>
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<td>Bubba Gump Shrimp Co.</td>
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<td>Johnny Rockets</td>
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<td>Beef ‘O’ Brady’s</td>
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<td>Houlihan’s</td>
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<tr>
<td>Jimmy Buffett’s Margaritaville</td>
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<tr>
<td>The Melting Pot</td>
<td>$190.2 million</td>
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<tr>
<td>Smokey Bones Bar &amp; Fire Grill</td>
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<td>Cooper’s Hawk Winery &amp; Restaurants</td>
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<td>Bertucci’s</td>
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<td>$180.6 million</td>
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<td>Black Angus Steakhouse</td>
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<tr>
<td>Bravo! Cucina Italiana</td>
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<tr>
<td>Lucille’s Smokehouse Bar-B-Que</td>
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<tr>
<td>Johnny Carino’s</td>
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<td>Firebirds Wood Fired Grill</td>
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<td>Quaker Steak &amp; Lube</td>
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<tr>
<td>Abuelo’s</td>
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<tr>
<td>Anthony’s Coal Fired Pizza</td>
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<tr>
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<td>$122.0 million</td>
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**Family Dining**

<table>
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<tr>
<th>Restaurant Name</th>
<th>Revenue</th>
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<tr>
<td>IHOP</td>
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<td>Denny’s</td>
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<tr>
<td>Cracker Barrel Old Country Store</td>
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<tr>
<td>Waffle House</td>
<td>$1.24 billion</td>
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</table>
• Bob Evans: $ 951.2 million
• Perkins Restaurant & Bakery: $ 635.0 million
• Village Inn: $ 361.0 million
• Friendly’s: $ 309.0 million
• Huddle House: $ 245.7 million
• Bill Miller Bar-B-Q: $ 244.8 million
• Sonny’s BBQ: $ 236.3 million
• Big Boy: $ 233.5 million
• Shoney’s: $ 210.1 million
• Black Bear Diner: $ 205.2 million
• First Watch: $ 174.5 million
• Eat’n Park: $ 166.3 million
• Shari’s Cafe and Pies: $ 160.4 million
• The Original Pancake House: $ 157.1 million
• LaRosa’s Pizzeria: $ 149.4 million
• Country Pride Restaurant: $ 140.7 million
• Marie Callender’s Restaurant & Bakery: $ 139.8 million

**Fast Casual**

• Panera Bread: $ 5.13 billion
• Chipotle Mexican Grill: $ 3.82 billion
• Panda Express: $ 2.90 billion
• Jimmy John’s Gourmet Sandwiches: $ 2.22 billion
• Zaxby’s: $ 1.71 billion
• Five Guys Burgers and Fries: $ 1.43 billion
• Wingstop: $ 943.2 million
• Jersey Mike’s Subs: $ 825.0 million
• Qdoba Mexican Eats: $ 805.0 million
• Raising Cane’s Chicken Fingers: $ 741.0 million
• Jason’s Deli: $ 702.1 million
• Moe’s Southwest Grill: $ 698.0 million
• Firehouse Subs: $ 683.5 million
• Boston Market: $ 633.4 million
• McAlister’s Deli: $ 592.8 million
• Noodles & Company: $ 559.0 million
• Dickey’s Barbecue Pit: $ 557.6 million
• Pollo Tropical: $ 403.7 million
• Einstein Bros. Bagels: $ 381.4 million
• Corner Bakery Cafe: $ 375.8 million
• Pei Wei Asian Diner: $ 365.5 million
• Au Bon Pain: $ 351.7 million
• Smashburger: $ 344.0 million
• Schlotzsky’s: $ 338.0 million
• Taco Cabana: $ 321.2 million
• Portillo’s: $304.5 million
• The Habit Burger Grill: $298.1 million
• Zoes Kitchen: $280.3 million
• Shake Shack: $280.3 million
• Which Wich Superior Sandwiches: $242.2 million
• Fuddruckers: $239.2 million
• Fazoli’s: $237.0 million
• Newk’s Eatery: $232.9 million
• Rubio’s: $231.7 million
• Le Pain Quotidien: $200.3 million
• Penn Station East Coast Subs: $198.8 million
• Bruegger’s Bagels: $196.5 million
• Cafe Rio Mexican Grill: $192.0 million
• Taco Bueno: $190.8 million
• Donatos Pizza: $189.9 million
• la Madeleine Country French Cafe: $184.7 million
• Baja Fresh Mexican Grill: $184.5 million
• Blaze Pizza: $184.5 million
• Pret a Manger: $177.8 million
• Freebirds World Burrito: $151.8 million
• MOD Pizza: $149.8 million
• BurgerFi: $148.2 million
• Fuzzy’s Taco Shop: $142.8 million
• Farmer Boys: $136.2 million
• Pieology Pizzeria: $135.2 million
• PDQ: $130.5 million
• Tijuana Flats: $129.3 million
• WaBa Grill: $127.9 million

Fine Dining
• Ruth’s Chris Steak House: $668.0 million
• The Capital Grille: $413.0 million
• Fleming’s Prime Steakhouse & Wine Bar: $285.0 million
• Morton’s The Steakhouse: $258.7 million
• Texas de Brazil Churrascaria: $247.7 million
• Mastro’s Restaurants: $201.8 million
• Fogo de Chao: $245.3 million
• Del Frisco’s Double Eagle Steak House: $166.8 million

Quick Service Restaurants
• McDonald’s: $36.38 billion
• Starbucks: $14.67 billion
• Subway: $11.30 billion
• Burger King: $9.43 billion
• Taco Bell: $ 9.35 billion
• Wendy’s: $ 8.96 billion
• Dunkin’ Donuts: $ 8.22 billion
• Chick-fil-A: $ 6.74 billion
• Pizza Hut: $ 5.75 billion
• Domino’s: $ 5.47 billion
• Sonic Drive-In: $ 4.51 billion
• KFC: $ 4.48 billion
• Little Caesars: $ 3.80 billion
• Arby’s: $ 3.66 billion
• Dairy Queen/Orange Julius: $ 3.62 billion
• Jack in the Box: $ 3.46 billion
• Papa John’s: $ 2.93 billion
• Popeyes Louisiana Kitchen: $ 2.87 billion
• Hardee’s: $ 2.24 billion
• Whataburger: $ 2.18 billion
• Golden Corral: $ 1.69 billion
• Carl’s Jr.: $ 1.51 billion
• Culver’s: $ 1.30 billion
• Bojangles’ Famous Chicken ‘N Biscuits: $ 1.22 billion
• Steak ’n Shake: $ 1.07 billion
• Papa Murphy’s Pizza: $ 884.7 million
• Church’s Chicken: $ 835.0 million
• In-N-Out Burger: $ 807.1 million
• El Pollo Loco: $ 795.4 million
• Tim Hortons: $ 760.0 million
• Krispy Kreme: $ 758.0 million
• Del Taco: $ 738.0 million
• Baskin-Robbins: $ 603.6 million
• White Castle: $ 564.2 million
• Auntie Anne’s: $ 547.8 million
• Jamba Juice: $ 547.2 million
• Captain D’s Seafood Kitchen: $ 543.7 million
• Checkers Drive-In Restaurants: $ 532.4 million
• Marco’s Pizza: $ 488.9 million
• Long John Silver’s: $ 475.4 million
• Potbelly Sandwich Shop: $ 445.9 million
• Round Table Pizza: $ 442.5 million
• Cici’s: $ 417.0 million
• Krystal Company: $ 416.9 million
• Chuck E. Cheese’s: $ 404.4 million
• Hungry Howie’s Pizza: $ 378.2 million
• Jet’s Pizza: $ 368.4 million
• Taco John’s: $ 362.9 million
• Charleys Philly Steaks: $362.5 million
• Cold Stone Creamery: $361.7 million
• Freddy’s Frozen Custard & Steakburgers: $340.4 million
• Old Country Buffet/HomeTown Buffet: $328.8 million
• Braum’s Ice Cream & Dairy Stores: $328.0 million
• Tropical Smoothie Cafe: $314.2 million
• Smoothie King: $283.6 million
• Rally’s Hamburgers: $272.5 million
• Souplantation & Sweet Tomatoes: $272.0 million
• Peet’s Coffee & Tea: $271.9 million
• Godfather’s Pizza: $269.4 million
• Caribou Coffee: $255.0 million
• Wienerschnitzel: $253.5 million
• Sizzler: $240.3 million
• Pizza Ranch: $231.7 million
• Luby’s: $229.8 million
• Quiznos: $227.5 million
• A&W All-American Food: $223.0 million
• Sarku Japan: $200.1 million
• The Coffee Bean & Tea Leaf: $199.1 million
• Dutch Bros. Coffee: $198.5 million
• Sbarro: $190.0 million
• Menchie’s Frozen Yogurt: $182.4 million
• Yogurtland: $168.1 million
• Cinnabon: $162.6 million
• Ryan’s: $153.6 million
• Wetzel’s Pretzels: $152.0 million
• Golden Chick: $147.9 million
• Togo’s Sandwiches: $145.6 million
• Jack’s: $143.4 million
• Pizza Pro: $139.5 million
• Rita’s Ice: $139.2 million
• Papa Gino’s Pizzeria: $132.9 million
• Mountain Mike’s Pizza: $130.7 million
• Ponderosa/Bonanza: $130.6 million
• Great American Cookies: $130.3 million
• Biggby Coffee: $130.0 million
• Villa Fresh Italian Kitchen: $126.0 million
• Rosati’s Pizza: $125.1 million

49.3 Type of Menu
The following are the largest restaurant chains by type of service (source: Restaurant Business, June 2017):
<table>
<thead>
<tr>
<th>Asian/Noodle</th>
<th>Value</th>
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<tbody>
<tr>
<td>Panda Express</td>
<td>$2.90 billion</td>
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<tr>
<td>P.F. Chang’s China Bistro</td>
<td>$892.0 million</td>
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<tr>
<td>Noodles &amp; Company</td>
<td>$559.0 million</td>
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<tr>
<td>Pei Wei Asian Diner</td>
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<tr>
<td>Benihana</td>
<td>$320.0 million</td>
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<tr>
<td>Sarku Japan</td>
<td>$200.1 million</td>
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<tr>
<td>WaBa Grill</td>
<td>$127.9 million</td>
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<table>
<thead>
<tr>
<th>Bakery Cafe</th>
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<tr>
<td>Panera Bread</td>
<td>$5.13 billion</td>
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<tr>
<td>Einstein Bros. Bagels</td>
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<tr>
<td>Corner</td>
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<tr>
<td>Au Bon Pain</td>
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<tr>
<td>Le Pain Quotidien</td>
<td>$200.3 million</td>
</tr>
<tr>
<td>Bruegger’s Bagels</td>
<td>$196.5 million</td>
</tr>
<tr>
<td>La Madeleine Country French Cafe</td>
<td>$184.7 million</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BBQ</th>
<th>Value</th>
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</thead>
<tbody>
<tr>
<td>Dickey’s Barbecue Pit</td>
<td>$557.6 million</td>
</tr>
<tr>
<td>Famous Dave’s</td>
<td>$424.0 million</td>
</tr>
<tr>
<td>Sonny’s BBQ</td>
<td>$236.3 million</td>
</tr>
<tr>
<td>Bill Miller Bar-B-Q</td>
<td>$244.8 million</td>
</tr>
<tr>
<td>Smokey Bones Bar &amp; Fire Grill</td>
<td>$188.1 million</td>
</tr>
<tr>
<td>Lucille’s Smokehouse Bar-B-Que</td>
<td>$149.6 million</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Burger</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>McDonald’s</td>
<td>$36.38 billion</td>
</tr>
<tr>
<td>Burger King</td>
<td>$9.43 billion</td>
</tr>
<tr>
<td>Wendy’s</td>
<td>$8.96 billion</td>
</tr>
<tr>
<td>Sonic Drive-In</td>
<td>$4.51 billion</td>
</tr>
<tr>
<td>Jack in the Box</td>
<td>$3.46 billion</td>
</tr>
<tr>
<td>Hardee’s</td>
<td>$2.24 billion</td>
</tr>
<tr>
<td>Whataburger</td>
<td>$2.18 billion</td>
</tr>
<tr>
<td>Carl’s Jr.</td>
<td>$1.51 billion</td>
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<tr>
<td>Five Guys Burgers and Fries</td>
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<tr>
<td>Culver’s</td>
<td>$1.30 billion</td>
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<tr>
<td>Steak ‘n Shake</td>
<td>$1.07 billion</td>
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<tr>
<td>In-N-Out Burger</td>
<td>$807.1 million</td>
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<tr>
<td>White Castle</td>
<td>$564.2 million</td>
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<td>Checkers Drive-In Restaurants</td>
<td>$532.4 million</td>
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<td>Krystal Company</td>
<td>$416.9 million</td>
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<tr>
<td>Smashburger</td>
<td>$344.0 million</td>
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<tr>
<td>Freddy’s Frozen Custard &amp; Steakburgers</td>
<td>$340.4 million</td>
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<tr>
<td>Restaurant</td>
<td>Revenue</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>The Habit Burger Grill</td>
<td>$298.1 million</td>
</tr>
<tr>
<td>Shake Shack</td>
<td>$280.3 million</td>
</tr>
<tr>
<td>Rally’s Hamburgers</td>
<td>$272.5 million</td>
</tr>
<tr>
<td>Fuddruckers</td>
<td>$239.2 million</td>
</tr>
<tr>
<td>A&amp;W All-American Food</td>
<td>$223.0 million</td>
</tr>
<tr>
<td>BurgerFi</td>
<td>$148.2 million</td>
</tr>
<tr>
<td>Jack’s</td>
<td>$143.4 million</td>
</tr>
<tr>
<td>Farmer Boys</td>
<td>$136.2 million</td>
</tr>
<tr>
<td>Chick-fil-A</td>
<td>$6.74 billion</td>
</tr>
<tr>
<td>KFC</td>
<td>$4.48 billion</td>
</tr>
<tr>
<td>Popeyes Louisiana Kitchen</td>
<td>$2.87 billion</td>
</tr>
<tr>
<td>Zaxby’s</td>
<td>$1.71 billion</td>
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<tr>
<td>Bojangles’ Famous Chicken ‘N Biscuits</td>
<td>$1.22 billion</td>
</tr>
<tr>
<td>Wingstop</td>
<td>$943.2 million</td>
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<tr>
<td>Church’s Chicken</td>
<td>$835.0 million</td>
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<td>El Pollo Loco</td>
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<tr>
<td>Raising Cane’s Chicken Fingers</td>
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<td>Boston Market</td>
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<td>Pollo Tropical</td>
<td>$403.7 million</td>
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<tr>
<td>Golden Chick</td>
<td>$147.9 million</td>
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<tr>
<td>PDQ</td>
<td>$130.5 million</td>
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<tr>
<td>Starbucks</td>
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<tr>
<td>Dunkin’ Donuts</td>
<td>$8.22 billion</td>
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<tr>
<td>Tim Hortons</td>
<td>$760.0 million</td>
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<tr>
<td>Peet’s Coffee &amp; Tea</td>
<td>$271.9 million</td>
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<tr>
<td>Caribou Coffee</td>
<td>$255.0 million</td>
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<tr>
<td>The Coffee Bean &amp; Tea Leaf</td>
<td>$199.1 million</td>
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<tr>
<td>Dutch Bros. Coffee</td>
<td>$198.5 million</td>
</tr>
<tr>
<td>Biggby Coffee</td>
<td>$130.0 million</td>
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<tr>
<td>Golden Corral</td>
<td>$1.69 billion</td>
</tr>
<tr>
<td>Old Country Buffet/HomeTown Buffet</td>
<td>$328.8 million</td>
</tr>
<tr>
<td>Souplantation &amp; Sweet Tomatoes</td>
<td>$272.0 million</td>
</tr>
<tr>
<td>Sizzler</td>
<td>$240.3 million</td>
</tr>
<tr>
<td>Luby’s</td>
<td>$229.8 million</td>
</tr>
<tr>
<td>Ryan’s</td>
<td>$153.6 million</td>
</tr>
<tr>
<td>Ponderosa/Bonanza</td>
<td>$130.6 million</td>
</tr>
</tbody>
</table>
### Family Style

- **IHOP:** $3.22 billion
- **Denny’s:** $2.58 billion
- **Cracker Barrel Old Country Store:** $2.32 billion
- **Waffle House:** $1.24 billion
- **Bob Evans:** $951.2 million
- **Perkins Restaurant & Bakery:** $635.0 million
- **Village Inn:** $361.0 million
- **Friendly’s:** $309.0 million
- **Huddle House:** $245.7 million
- **Big Boy:** $233.5 million
- **Shoney’s:** $210.1 million
- **Black Bear Diner:** $205.2 million
- **First Watch:** $174.5 million
- **Eat’n Park:** $166.3 million
- **Shari’s Cafe and Pies:** $160.4 million
- **The Original Pancake House:** $157.1 million
- **Country Pride Restaurant:** $140.7 million
- **Marie Callender’s Restaurant & Bakery:** $139.8 million

### Frozen Desserts

- **Dairy Queen/Orange Julius:** $3.62 billion
- **Baskin-Robbins:** $603.6 million
- **Cold Stone Creamery:** $361.7 million
- **Braum’s Ice Cream & Dairy Stores:** $328.0 million
- **Menchie’s Frozen Yogurt:** $182.4 million
- **Yogurtland:** $168.1 million
- **Rita’s Ice:** $139.2 million

### Italian/Pizza

- **Olive Garden:** $3.86 billion
- **California Pizza Kitchen:** $762.5 million
- **Carrabba’s Italian Grill:** $707.0 million
- **Maggiano’s Little Italy:** $411.8 million
- **Mellow Mushroom:** $350.6 million
- **Romano’s Macaroni Grill:** $268.2 million
- **Brio Tuscan Grille:** $256.8 million
- **Fazoli’s:** $237.0 million
- **Buca di Beppo:** $220.0 million
- **Bertucci’s:** $184.2 million
- **Bravo! Cucina Italiana:** $151.4 million
- **LaRosa’s Pizzeria:** $149.4 million
- **Johnny Carino’s:** $146.6 million
- **Anthony’s Coal Fired Pizza:** $123.1 million

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*RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019*

- 281 -
<table>
<thead>
<tr>
<th>Mexican</th>
<th>Pizza</th>
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<tbody>
<tr>
<td>• Taco Bell: $9.35 billion</td>
<td>• Pizza Hut: $5.75 billion</td>
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<tr>
<td>• Chipotle Mexican Grill: $3.82 billion</td>
<td>• Domino’s: $5.47 billion</td>
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<tr>
<td>• Qdoba Mexican Eats: $805.0 million</td>
<td>• Little Caesars: $3.80 billion</td>
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<tr>
<td>• Del Taco: $738.0 million</td>
<td>• Papa John’s: $2.93 billion</td>
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<tr>
<td>• Moe’s Southwest Grill: $698.0 million</td>
<td>• Papa Murphy’s Pizza: $884.7 million</td>
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<tr>
<td>• Taco John’s: $362.9 million</td>
<td>• Marco’s Pizza: $488.9 million</td>
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<tr>
<td>• On The Border Mexican Grill &amp; Cantina: $356.3 million</td>
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<tr>
<td>• Chuy’s: $330.6 million</td>
<td>• Round Table Pizza: $442.5 million</td>
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<td>• Taco Cabana: $321.2 million</td>
<td>• Cici’s: $417.0 million</td>
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<tr>
<td>• Rubio’s: $231.7 million</td>
<td>• Chuck E. Cheese’s: $404.4 million</td>
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<tr>
<td>• Baja Fresh Mexican Grill: $184.5 million</td>
<td>• Hungry Howie’s Pizza: $378.2 million</td>
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<tr>
<td>• Cafe Rio Mexican Grill: $192.0 million</td>
<td>• Jet’s Pizza: $368.4 million</td>
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<td>• Taco Bueno: $190.8 million</td>
<td>• Godfather’s Pizza: $269.4 million</td>
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<tr>
<td>• Uncle Julio’s: $170.5 million</td>
<td>• Pizza Ranch: $231.7 million</td>
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<tr>
<td>• Pappasito’s Cantina: $160.9 million</td>
<td>• Sbarro: $190.0 million</td>
</tr>
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<td>• Freebirds World Burrito: $151.8 million</td>
<td>• Donatos Pizza: $189.9 million</td>
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<td>• Fuzzy’s Taco Shop: $142.8 million</td>
<td>• Blaze Pizza: $184.5 million</td>
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<td>• Cantina Laredo: $130.6 million</td>
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<td>• Tijuana Flats: $129.3 million</td>
<td>• Pizza Pro: $139.5 million</td>
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<tr>
<td>• El Torito: $128.7 million</td>
<td>• Pieology Pizzeria: $135.2 million</td>
</tr>
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<td>Restaurant Type</td>
<td>Company</td>
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<tr>
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<td>Pizza</td>
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<td>Which Wich Superior Sandwiches</td>
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<td>Dave &amp; Buster’s</td>
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<tr>
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<tr>
<td>Tilted Kilt Pub &amp; Eatery</td>
<td>$180.6 million</td>
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<tr>
<td>Quaker Steak &amp; Lube</td>
<td>$132.5 million</td>
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<tr>
<td>The Capital Grille</td>
<td>$413.0 million</td>
</tr>
<tr>
<td>Fleming’s Prime Steakhouse &amp; Wine Bar</td>
<td>$285.0 million</td>
</tr>
<tr>
<td>Morton’s The Steakhouse</td>
<td>$258.7 million</td>
</tr>
<tr>
<td>Saltgrass Steak House</td>
<td>$249.1 million</td>
</tr>
<tr>
<td>Texas de Brazil Churrascaria</td>
<td>$247.7 million</td>
</tr>
<tr>
<td>Fogo de Chao</td>
<td>$245.3 million</td>
</tr>
<tr>
<td>Mastro’s Restaurants</td>
<td>$201.8 million</td>
</tr>
<tr>
<td>Del Frisco’s Double Eagle Steak House</td>
<td>$166.8 million</td>
</tr>
<tr>
<td>Black Angus Steakhouse</td>
<td>$154.1 million</td>
</tr>
<tr>
<td>Applebee’s</td>
<td>$4.41 billion</td>
</tr>
<tr>
<td>Chili’s Grill &amp; Bar</td>
<td>$3.63 billion</td>
</tr>
<tr>
<td>The Cheesecake Factory</td>
<td>$2.07 billion</td>
</tr>
<tr>
<td>Red Robin Gourmet Burgers and Brews</td>
<td>$1.47 billion</td>
</tr>
<tr>
<td>TGI Fridays</td>
<td>$1.36 billion</td>
</tr>
<tr>
<td>Ruby Tuesday</td>
<td>$1.11 billion</td>
</tr>
<tr>
<td>BJ’s Restaurant &amp; Brewhouse</td>
<td>$993.0 million</td>
</tr>
<tr>
<td>Cheddar’s Scratch Kitchen</td>
<td>$751.0 million</td>
</tr>
<tr>
<td>Yard House</td>
<td>$524.0 million</td>
</tr>
<tr>
<td>O’Charley’s</td>
<td>$502.5 million</td>
</tr>
<tr>
<td>Ninety Nine Restaurants</td>
<td>$304.0 million</td>
</tr>
<tr>
<td>Hard Rock Cafe</td>
<td>$302.3 million</td>
</tr>
<tr>
<td>Zoes Kitchen</td>
<td>$280.3 million</td>
</tr>
<tr>
<td>Restaurant</td>
<td>Revenue</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>------------</td>
</tr>
<tr>
<td>Bar Louie</td>
<td>$279.4 million</td>
</tr>
<tr>
<td>Old Chicago Pizza &amp; Taproom</td>
<td>$255.1 million</td>
</tr>
<tr>
<td>Uno Pizzeria &amp; Grill</td>
<td>$251.6 million</td>
</tr>
<tr>
<td>Seasons 52</td>
<td>$247.0 million</td>
</tr>
<tr>
<td>Claim Jumper</td>
<td>$227.5 million</td>
</tr>
<tr>
<td>Mimi’s Cafe</td>
<td>$224.1 million</td>
</tr>
<tr>
<td>Rainforest Cafe</td>
<td>$216.0 million</td>
</tr>
<tr>
<td>Bahama Breeze Island Grille</td>
<td>$219.0 million</td>
</tr>
<tr>
<td>Johnny Rockets</td>
<td>$207.4 million</td>
</tr>
<tr>
<td>Houlihan’s</td>
<td>$198.4 million</td>
</tr>
<tr>
<td>Jimmy Buffett’s Margaritaville</td>
<td>$190.4 million</td>
</tr>
<tr>
<td>The Melting Pot</td>
<td>$190.2 million</td>
</tr>
<tr>
<td>Cooper’s Hawk Winery &amp; Restaurants</td>
<td>$185.3 million</td>
</tr>
<tr>
<td>J. Alexander’s</td>
<td>$177.4 million</td>
</tr>
<tr>
<td>Islands Fine Burgers &amp; Drinks</td>
<td>$170.5 million</td>
</tr>
<tr>
<td>Kona Grill</td>
<td>$169.5 million</td>
</tr>
<tr>
<td>Firebirds Wood Fired Grill</td>
<td>$144.0 million</td>
</tr>
<tr>
<td>Granite City Food &amp; Brewery</td>
<td>$136.6 million</td>
</tr>
<tr>
<td>Grand Lux Cafe</td>
<td>$134.4 million</td>
</tr>
<tr>
<td>Roosters</td>
<td>$132.0 million</td>
</tr>
<tr>
<td>Houston’s</td>
<td>$124.1 million</td>
</tr>
</tbody>
</table>

49.4 Market Resources

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

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

50.1 Overview
Technomic (www.technomic.com) annually ranks the largest 500 restaurant chains based on U.S. systemwide sales. Systemwide sales include sales from both corporate-owned and franchised locations. The ranking is published annually by Restaurant Business in the June issue.

50.2 Sales And Unit Growth
Among the largest 500 restaurant chains, the following reported the highest growth (source: Restaurant Business, June 2017):

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Sales Growth</th>
<th>Unit Growth</th>
<th>Overall Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>MOD Pizza</td>
<td>129.8%</td>
<td>103.3%</td>
<td>213</td>
</tr>
<tr>
<td>Pie Five Pizza Co.</td>
<td>110.4%</td>
<td>63.0%</td>
<td>461</td>
</tr>
<tr>
<td>Mission BBQ</td>
<td>94.3%</td>
<td>110.0%</td>
<td>405</td>
</tr>
<tr>
<td>Slim Chickens</td>
<td>90.3%</td>
<td>93.3%</td>
<td>350</td>
</tr>
<tr>
<td>Blaze Pizza</td>
<td>82.1%</td>
<td>62.5%</td>
<td>191</td>
</tr>
<tr>
<td>Pieology Pizzeria</td>
<td>81.2%</td>
<td>66.7%</td>
<td>229</td>
</tr>
<tr>
<td>Metro Diner</td>
<td>78.4%</td>
<td>93.3%</td>
<td>463</td>
</tr>
<tr>
<td>Modern Market</td>
<td>66.7%</td>
<td>45.0%</td>
<td>473</td>
</tr>
<tr>
<td>Sweetgreen</td>
<td>58.5%</td>
<td>64.1%</td>
<td>334</td>
</tr>
<tr>
<td>Rock &amp; Brews</td>
<td>58.1%</td>
<td>50.0%</td>
<td>372</td>
</tr>
<tr>
<td>Snap Kitchen</td>
<td>55.6%</td>
<td>37.1%</td>
<td>458</td>
</tr>
<tr>
<td>PizzaRev</td>
<td>51.8%</td>
<td>37.5%</td>
<td>478</td>
</tr>
<tr>
<td>BonChon</td>
<td>49.4%</td>
<td>48.6%</td>
<td>339</td>
</tr>
<tr>
<td>Smallcakes Cupcakery and Creamery</td>
<td>47.5%</td>
<td>47.8%</td>
<td>430</td>
</tr>
<tr>
<td>Taziki’s Mediterranean Cafe</td>
<td>46.5%</td>
<td>44.2%</td>
<td>311</td>
</tr>
<tr>
<td>Nando’s</td>
<td>44.8%</td>
<td>35.7%</td>
<td>411</td>
</tr>
<tr>
<td>Shake Shack</td>
<td>40.0%</td>
<td>44.9%</td>
<td>130</td>
</tr>
<tr>
<td>WaBa Grill</td>
<td>39.8%</td>
<td>39.1%</td>
<td>243</td>
</tr>
<tr>
<td>Bareburger</td>
<td>37.5%</td>
<td>37.0%</td>
<td>333</td>
</tr>
<tr>
<td>Torchy’s Tacos</td>
<td>37.0%</td>
<td>28.9%</td>
<td>464</td>
</tr>
</tbody>
</table>
50.3 Market Resources
Restaurant Business, 1 Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181. (630) 574-5075. (www.restaurantbusinessonline.com)

Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)
51

TOP CONTRACT MANAGEMENT COMPANIES

51.1 Overview

*Food Management* annually ranks the largest contract management companies based on annual revenue.

This chapter presents the 2017 list of top 50 contract management companies.

51.2 Market Leaders

Ranked by annual revenue, the largest contract management companies are as follows:

- Compass Group North America: $15.90 billion
- Aramark Corp.: $ 9.95 billion
- Sodexo, Inc.: $ 9.80 billion
- Delaware North Companies: $ 2.80 billion
- Centerplate: $ 850 million
- Elior North America: $ 637 million
- AVI Foodsystems, Inc.: $ 625 million
- Healthcare Services Group, Inc.: $ 527 million
- Thompson Hospitality: $ 525 million
- Guest Services, Inc.: $ 388 million
- Spectra Food Services & Hospitality: $ 355 million
- Guckenheimer Enterprises, Inc.: $ 335 million
- Legends Hospitality: $ 275 million
- CulinArt, Inc.: $ 265 million
- Unidine Corp.: $ 250 million
- Metz Culinary Management: $ 225 million
- Gourmet Services, Inc.: $ 217 million
- Southwest Foodservice Excellence: $ 206 million
- Whismons Culinary Group: $ 166 million
- Parkhurst Dining: $ 164 million
- Thomas Cuisine Management: $ 145 million
- Nutrition Group: $ 138 million
- Taher, Inc.: $ 115 million
- Treat America, Ltd.: $ 111 million
- Continental Services: $ 95 million
<table>
<thead>
<tr>
<th>Company Name</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southern Foodservice</td>
<td>$85 million</td>
</tr>
<tr>
<td>Lessing’s Food Service Management</td>
<td>$80 million</td>
</tr>
<tr>
<td>Creative Dining Services</td>
<td>$78 million</td>
</tr>
<tr>
<td>MMI Dining Systems</td>
<td>$75 million</td>
</tr>
<tr>
<td>Pomptonian Food Service</td>
<td>$74 million</td>
</tr>
<tr>
<td>HHS Culinary &amp; Nutrition Solutions</td>
<td>$65 million</td>
</tr>
<tr>
<td>LPM Affiliated Companies dba Epicurean Feast</td>
<td>$65 million</td>
</tr>
<tr>
<td>Lancer Hospitality</td>
<td>$64 million</td>
</tr>
<tr>
<td>ABM Healthcare Support Services</td>
<td>$56 million</td>
</tr>
<tr>
<td>Prime Business Dining</td>
<td>$51 million</td>
</tr>
<tr>
<td>Food Management Group, Inc.</td>
<td>$50 million</td>
</tr>
<tr>
<td>Epicurean Group</td>
<td>$47 million</td>
</tr>
<tr>
<td>Cafe Services, Inc.</td>
<td>$45 million</td>
</tr>
<tr>
<td>Sterling Spoon Culinary Management</td>
<td>$40 million</td>
</tr>
<tr>
<td>Lakeview Center, Inc. dba Gulf Coast Enterprises</td>
<td>$38 million</td>
</tr>
<tr>
<td>Quest Food Management</td>
<td>$38 million</td>
</tr>
<tr>
<td>Corporate Chefs, Inc.</td>
<td>$37 million</td>
</tr>
<tr>
<td>Prince Food Systems, Inc.</td>
<td>$36 million</td>
</tr>
<tr>
<td>Brock &amp; Co., Inc.</td>
<td>$35 million</td>
</tr>
<tr>
<td>Food For Thought</td>
<td>$35 million</td>
</tr>
<tr>
<td>Luby’s Culinary Services</td>
<td>$30 million</td>
</tr>
<tr>
<td>Lintons Managed Services</td>
<td>$29 million</td>
</tr>
<tr>
<td>Food Services, Inc.</td>
<td>$28 million</td>
</tr>
<tr>
<td>Culinary Services Group</td>
<td>$26 million</td>
</tr>
<tr>
<td>RMA Hospitality Management</td>
<td>$20 million</td>
</tr>
</tbody>
</table>
52.1 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.)

52.2 Market Resources

Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)
53

TOP RESTAURANT FRANCHISEES

53.1 Ranking By Revenue

Annually, Forbes ranks restaurant franchisees by revenue based on data from Franchise Times. The following is the 2016 ranking:

- Flynn Restaurant Group (San Francisco, CA): $1.90 billion
- NPC International (Overland Park, KS): $1.22 billion
- Dhanani Group (Sugar Land, TX): $871 million
- Carrols Restaurant Group (Syracuse, NY): $859 million
- Manna (Louisville, KY): $814 million
- Summit Restaurant Group (Richardson, TX): $756 million
- Muy! Brands (San Antonio, TX): $631 million
- Covelli Enterprises (Warren, OH): $624 million
- Yadav Enterprises (Fremont, CA): $602 million
- Sun Holdings (Dallas, TX): $559 million

53.2 Ranking By Unit Count

Annually, franchising.com and FRANdata (www.frandata.com) compile 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 2016:

<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 Lousiana 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</td>
</tr>
</tbody>
</table>
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 & Lube, Freshii, Mooyah Burgers & Fries, Panda Express, Salad Creations

• Army & Air Force Exchange Services: 473
  Arby’s, Blimpie, Burger King, Charley’s Grilled Subs, 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

• Sun Holdings: 453
  Arby’s, Burger King, Cici’s, Popeyes, Golden Corral, Krispy Kreme, Louisiana Kitchen

• HMSHost Corp: 393
  Baja Fresh, Blimpie, Burger King, Chick-fil-A, Chili’s, Cinnabon, Cold Stone Creamery, Dunkin’ Donuts, Einstein Bros. Bagels, Famous Famiglia, Godfather’s Pizza, Great American Bagel, Great Steak & Potato Company, Jamba Juice, Johnny Rockets, Kelly’s Cajun Grill, KFC, La Salsa, Max & Erma’s, 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, Smashburger, Smokehouse, Sonny Bryan’s Salad Creations, Steak ‘N Shake, Subway, Villa Pizza, Yeung’s Lotus Express

• Tacala: 384
  Pizza Hut, Sonic Drive-in, Taco Bell

• Rottinghaus Company: 382
  Subway

• Sodexo: 378
  Baja Fresh, Blimpie, Burger King, Carl’s Jr., Chester’s, Chick-fil-A, Einstein Bros. Bagels, Erbert & Gerbert’s, Godfather’s Pizza, Jamba Juice, KFC, Mcalister’s Deli, Moe’s
Southwest Grill, Nrgize Lifestyle Cafe, Papa John’s Pizza, Pizza Hut, PJ’s Coffee of New Orleans, Planet Sub, Quaker Steak & Lube, Quiznos, Seattle’s Best Coffee, Subway, Taco Bell, Tim Hortons, Wow Cafe & Wingery

• Pilot Travel Centers: 369
  Arby’s, Carvel, Cinnabon, Dairy Queen, Huddle House, KFC, Moe’s Southwest Grill, Pizza Hut, Subway, Taco Bell, Wendy’s/

• Muy! Brands: 365
  Pizza Hut, Taco Bell, Wendy’s

• Manna Inc.: 361
  Wendy’s, Chili’s, Fazoli’s, Perkins Restaurant & Bakery

• Boddie-Noell Enterprises: 330
  Hardee’s

• 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

• Wilcohess: 280
  Arby’s, Dunkin’ Donuts, Godfather’s Pizza, Subway, Wendy’s

• KBPBP Foods: 276
  KFC, Long John Silver’s, Taco Bell

• 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, Dairy Queen, Little Caesars Pizza, Quiznos, Subway

• Marlu Investment Group: 205
  Arby’s, Church’s Chicken, Captain D’s, TGI Fridays, Jack in the Box, Little Caesars Pizza, Sizzler

• TA Operating: 201
  Burger King, Knights Inn, Pizza Hut, Popeyes Louisiana Kitchen, Subway,
Taco Bell, Tim Hortons
Denny’s, Grandy’s, Long John
Silver’s, Wendy’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, Jamba Juice, Jerry’s
Subs & Pizza, Johnny Rockets,
Moe’s Southwest Grill, Papa John’s
Pizza, Pinkberry, Pizza Hut,
Quiznos, Rollerz, Subway, Taco Bell,
Uno Due Go, Wendy’s

Pacpizza: 156
Pizza Hut

Desert De Oro Foods: 155
Pizza Hut, KFC, Long John Silver’s,
Taco Bell

Restaurant Mgt. Co. of Wichita: 155
Long John Silver’s, Pizza Hut

B & B Consultants: 153
Sonic Drive-in

Fourteen Foods: 153
Dairy Queen Braziers, DQ Grill &
Chill

Davco Restaurants: 153
Wendy’s

PJ United: 152
Papa John’s Pizza

Interfoods of America: 140
Popeyes Louisiana Kitchen

Chalak Mitra Group: 140
KFC

Celebration Restaurant Group: 139
Pizza Hut, Taco Bell

Valenti Management: 139
Chili’s, Wendy’s

RMH Franchise Corp: 137
Applebee’s

RPM Pizza: 135
Domino’s Pizza

Doherty Enterprises: 134
Applebee’s, Panera Bread

Apple Gold: 132
Applebee’s

Summit Restaurant Group: 131
A&W, Long John Silver’s, Pizza Hut

America’s Pizza Co.: 128
Pizza Hut, Wingstreet

Cafua Management Company: 128
Dunkin’ Donuts, Dunkin’
Donuts/Baskin-Robbins:

Las Vegas Pizza: 127
Pizza Hut

Palo Alto: 124
KFC, Pizza Hut, Taco Bell

Rage: 123
Pizza Hut

Marchelle Stewart: 123
KFC

Wisconsin Hospitality Group: 121
Applebee’s, Pizza Hut

Bajco: 121
Papa John’s Pizza

JEM Restaurant Group: 119
Pizza Hut, Taco Bell

The Scrivanos Group: 118
Dunkin’ Donuts, Dunkin’
Donuts/Baskin-Robbins:

- South American Restaurants Corp.: 117 Church’s Chicken
- Neighborhood Restau. Partners: 115 Applebee’s
- Briad Restaurant Group: 114 TGI Fridays, Wendy’s
- Dipasqua Enterprises: 114 Subway
- Western Reserve Restaurant Mgt.: 113 Wendy’s
- Randolph S Katz: 111 Midas
- Daland Corp: 110 Pizza Hut
- Goldco: 109 Burger King
- Pepper Dining: 104 Chili’s
- Magic Burgers: 103 Burger King
- Brij Agrawal: 102 Subway
- Northeast Foods: 101 Burger King
- Paradigm Investment Group: 98 Hardee’s
- Luihn Food System: 97 KFC, Hurricane Grill & Wings, Long John Silver’s, Taco Bell
- Tanweer Ahmed: 97 KFC, Taco Bell
- Boom: 97 Sonic Drive-in
- A3H Foods LP: 95 Jack in the Box
- Houston Foods: 95 Burger King
- William B. Graves: 95 Domino’s Pizza
- Burgerbusters: 94 Pizza Hut, Taco Bell
- John Boike: 94 Subway

53.3 Market Resources
Franchise Update Media Group, P.O. Box 20547, San Jose, CA 95160. (408) 402-5681. (www.franchising.com)
TOP FRANCHISERS

54.1 Overview
According to Nation’s Restaurant News, 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.

54.2 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:</td>
<td>26,530</td>
</tr>
<tr>
<td>McDonald’s:</td>
<td>12,836</td>
</tr>
<tr>
<td>Dunkin’ Donuts:</td>
<td>8,047</td>
</tr>
<tr>
<td>Pizza Hut:</td>
<td>7,337</td>
</tr>
<tr>
<td>Burger King:</td>
<td>7,077</td>
</tr>
<tr>
<td>7-Eleven:</td>
<td>6,390</td>
</tr>
<tr>
<td>Taco Bell:</td>
<td>4,995</td>
</tr>
<tr>
<td>Wendy’s:</td>
<td>4,895</td>
</tr>
<tr>
<td>Domino’s:</td>
<td>4,690</td>
</tr>
<tr>
<td>Starbucks Coffee:</td>
<td>4,659</td>
</tr>
<tr>
<td>Dairy Queen:</td>
<td>4,444</td>
</tr>
<tr>
<td>KFC:</td>
<td>4,164</td>
</tr>
<tr>
<td>Little Caesars Pizza:</td>
<td>3,528</td>
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<tr>
<td>Sonic America’s Drive-In:</td>
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<tr>
<td>Papa John’s Pizza:</td>
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</tr>
<tr>
<td>Baskin-Robbins:</td>
<td>2,478</td>
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<tr>
<td>Arby’s:</td>
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<tr>
<td>Jimmy John’s Gourmet Sandwiches:</td>
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</tr>
<tr>
<td>Chick-fil-A:</td>
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<tr>
<td>Applebee’s Neighborhood Grill &amp; Bar:</td>
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<tr>
<td>Jack in the Box:</td>
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<tr>
<td>Popeyes Louisiana Kitchen:</td>
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<tr>
<td>IHOP:</td>
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<tr>
<td>Denny’s:</td>
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<tr>
<td>Restaurant</td>
<td>Sales (in millions)</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Hardee’s:</td>
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<tr>
<td>Papa Murphy’s Take ‘N’ Bake Pizza:</td>
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<tr>
<td>Auntie Anne’s:</td>
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</tr>
<tr>
<td>Quiznos:</td>
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<td>Cold Stone Creamery:</td>
<td>912</td>
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<tr>
<td>Church’s Chicken:</td>
<td>907</td>
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<tr>
<td>Tim Hortons:</td>
<td>881</td>
</tr>
<tr>
<td>Jersey Mike’s Subs:</td>
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</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>
</tr>
<tr>
<td>Waffle House:</td>
<td>750</td>
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<tr>
<td>Circle K:</td>
<td>706</td>
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<tr>
<td>A&amp;W All American Food:</td>
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<tr>
<td>Wingstop:</td>
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<tr>
<td>Buffalo Wild Wings Grill &amp; Bar:</td>
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<tr>
<td>Marco’s Pizza:</td>
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<tr>
<td>Moe’s Southwest Grill:</td>
<td>577</td>
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<tr>
<td>Smoothie King:</td>
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<tr>
<td>Godfather’s Pizza:</td>
<td>553</td>
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<tr>
<td>Zaxby’s:</td>
<td>546</td>
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<tr>
<td>Jamba Juice:</td>
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<td>Hungry Howie’s Pizza:</td>
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<td>Culver’s:</td>
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<tr>
<td>Dickey’s Barbecue Pit:</td>
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<tr>
<td>Chili’s Grill &amp; Bar:</td>
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<td>CiCi’s Pizza:</td>
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<td>Tropical Smoothie Cafe:</td>
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<tr>
<td>Charley’s Grilled Subs/Charleys Philly Steaks:</td>
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<tr>
<td>Golden Corral:</td>
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<tr>
<td>Taco John’s:</td>
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<tr>
<td>Round Table Pizza:</td>
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<tr>
<td>Bojangles’ Famous Chicken ‘n Biscuits:</td>
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<td>Einstein Bros. Bagels:</td>
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<tr>
<td>Huddle House:</td>
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<td>Qdoba Mexican Grill:</td>
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<tr>
<td>Wienerschnitzel:</td>
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<td>Checkers:</td>
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<td>Schlotzsky’s:</td>
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<td>McAlister’s Deli:</td>
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<tr>
<td>Penn Station East Coast Subs:</td>
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<tr>
<td>Perkins Restaurant &amp; Bakery:</td>
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<tr>
<td>Restaurant</td>
<td>Score</td>
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<tr>
<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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<tr>
<td>Captain D’s Seafood Kitchen:</td>
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<td>Beef ‘O’ Brady’s Family Sports Pub:</td>
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<td>Pizza Ranch</td>
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<tr>
<td>Johnny Rockets</td>
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<td>Krispy Kreme Doughnuts:</td>
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<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>
<td>149</td>
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<tr>
<td>Rally’s Hamburgers:</td>
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<tr>
<td>Friendly’s</td>
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<td>Famous Dave’s</td>
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<tr>
<td>Caribou Coffee</td>
<td>129</td>
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<td>Krystal</td>
<td>127</td>
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<tr>
<td>The Melting Pot</td>
<td>126</td>
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<tr>
<td>Smashburger</td>
<td>122</td>
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<tr>
<td>Steak ‘n Shake</td>
<td>122</td>
</tr>
<tr>
<td>Freddy’s Frozen Custard &amp; Steakburgers:</td>
<td>121</td>
</tr>
<tr>
<td>Whataburger</td>
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<tr>
<td>Sizzler</td>
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<tr>
<td>Sonny’s Real Pit Bar-B-Q:</td>
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<tr>
<td>Jason’s Deli</td>
<td>106</td>
</tr>
<tr>
<td>Big Boy/Frisch’s Big Boy:</td>
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<tr>
<td>Outback Steakhouse:</td>
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<td>Shoney’s</td>
<td>103</td>
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<tr>
<td>Fuddruckers</td>
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<tr>
<td>Donatos Pizza</td>
<td>100</td>
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<tr>
<td>Red Robin Gourmet Burgers &amp; Brews:</td>
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</tr>
<tr>
<td>Bruegger’s Bagels</td>
<td>98</td>
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<tr>
<td>Fazoli’s</td>
<td>88</td>
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<tr>
<td>Village Inn</td>
<td>86</td>
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<td>Panda Express</td>
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<tr>
<td>Au Bon Pain</td>
<td>74</td>
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<tr>
<td>Corner Bakery Cafe</td>
<td>70</td>
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<td>Texas Roadhouse</td>
<td>70</td>
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<td>Sarku Japan</td>
<td>68</td>
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<tr>
<td>Cheddar’s Scratch Kitchen:</td>
<td>65</td>
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<tr>
<td>Black Bear Diner</td>
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<tr>
<td>Ruth’s Chris Steak House:</td>
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<td>Carino’s Italian</td>
<td>55</td>
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<tr>
<td>Noodles &amp; Company</td>
<td>53</td>
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<tr>
<td>Raising Cane’s Chicken Fingers:</td>
<td>51</td>
</tr>
<tr>
<td>Houlihan’s</td>
<td>44</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%
• Zoes Kitchen: 3 2%
• P.F. Chang’s China Bistro: 2 1%

54.3 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
• Braun’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
• 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

54.4 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

### 55.1 Rank By Annual Gross Revenue

According to *Restaurant Business* (October 2016), the following independent restaurants have the highest annual gross revenue:

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Sales (USD)</th>
<th>Meals Served</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tao Asian Bistro (Las Vegas, NV)</td>
<td>$47,941,106</td>
<td>22,704</td>
</tr>
<tr>
<td>Joe’s Stone Crab (Miami Beach, FL)</td>
<td>$36,837,000</td>
<td>350,000</td>
</tr>
<tr>
<td>Tao Downtown (New York, NY)</td>
<td>$33,822,962</td>
<td>450,000</td>
</tr>
<tr>
<td>Carmine’s - Times Square (New York, NY)</td>
<td>$32,015,788</td>
<td>395,000</td>
</tr>
<tr>
<td>Old Ebbitt Grill (Washington, DC)</td>
<td>$30,568,157</td>
<td>650,802</td>
</tr>
<tr>
<td>Lavo New York (New York, NY)</td>
<td>$27,508,162</td>
<td>260,000</td>
</tr>
<tr>
<td>Smith &amp; Wollensky (New York, NY)</td>
<td>$25,584,000</td>
<td>298,417</td>
</tr>
<tr>
<td>Gibsons Bar &amp; Steakhouse (Chicago, IL)</td>
<td>$23,636,657</td>
<td>356,051</td>
</tr>
<tr>
<td>Prime 112 (Miami Beach, FL)</td>
<td>$23,600,000</td>
<td>220,000</td>
</tr>
<tr>
<td>Joe’s Seafood, Prime Steak &amp; Stone Crab (Washington, DC)</td>
<td>$23,600,000</td>
<td>290,800</td>
</tr>
<tr>
<td>Tao Uptown (New York, NY)</td>
<td>$23,357,631</td>
<td>304,689</td>
</tr>
<tr>
<td>Joe’s Seafood, Prime Steak &amp; Stone Crab (Las Vegas, NV)</td>
<td>$22,300,000</td>
<td>285,900</td>
</tr>
<tr>
<td>Bottega Louie (Los Angeles, CA)</td>
<td>$21,732,696</td>
<td>479,316</td>
</tr>
<tr>
<td>Joe’s Seafood, Prime Steak &amp; Stone Crab (Chicago, IL)</td>
<td>$21,600,000</td>
<td>276,000</td>
</tr>
<tr>
<td>Junior’s - Times Square (New York, NY)</td>
<td>$21,501,008</td>
<td>950,000</td>
</tr>
<tr>
<td>Buddakan (New York, NY)</td>
<td>$20,960,758</td>
<td>250,416</td>
</tr>
<tr>
<td>Carnevino Italian Steakhouse (Las Vegas, NV)</td>
<td>$20,400,000</td>
<td>113,000</td>
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<tr>
<td>Bazaar Meat by Jose Andres (Las Vegas, NV)</td>
<td>$20,100,000</td>
<td>191,400</td>
</tr>
<tr>
<td>Bryant Park Grill &amp; Café (New York, NY)</td>
<td>$20,000,000</td>
<td>400,000</td>
</tr>
<tr>
<td>Fulton’s Crab House (Orlando, FL)</td>
<td>$19,900,000</td>
<td>414,000</td>
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<tr>
<td>SW Steakhouse (Las Vegas, NV)</td>
<td>$19,900,000</td>
<td>151,000</td>
</tr>
<tr>
<td>The Hamilton (Washington, DC)</td>
<td>$19,314,488</td>
<td>391,140</td>
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<tr>
<td>David Burke Primehouse (Chicago, IL)</td>
<td>$19,300,000</td>
<td>203,000</td>
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<tr>
<td>Sparks Steak House (New York, NY)</td>
<td>$18,600,000</td>
<td>202,000</td>
</tr>
<tr>
<td>St. Elmo Steak House (Indianapolis, IN)</td>
<td>$18,460,067</td>
<td>212,184</td>
</tr>
<tr>
<td>Bob Chinn’s Crab House (Wheeling, IL)</td>
<td>$18,426,078</td>
<td>518,273</td>
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<tr>
<td>Blue Fin (New York, NY)</td>
<td>$18,400,000</td>
<td>263,000</td>
</tr>
<tr>
<td>The Smith - Lincoln Square (New York, NY)</td>
<td>$18,250,000</td>
<td>492,392</td>
</tr>
<tr>
<td>Prime Steakhouse (Las Vegas, NV)</td>
<td>$17,900,000</td>
<td>116,000</td>
</tr>
<tr>
<td>Restaurant Name</td>
<td>Revenue</td>
<td>Food Cost</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>-----------</td>
<td>-----------</td>
</tr>
<tr>
<td>Del Posto (New York, NY)</td>
<td>$17,900,000</td>
<td>112,000</td>
</tr>
<tr>
<td>Mon Ami Gabi (Las Vegas, NV)</td>
<td>$17,400,000</td>
<td>256,000</td>
</tr>
<tr>
<td>Spago (Las Vegas, NV)</td>
<td>$17,400,000</td>
<td>276,000</td>
</tr>
<tr>
<td>Angus Barn (Raleigh, NC)</td>
<td>$17,345,034</td>
<td>264,963</td>
</tr>
<tr>
<td>Shaw’s Crab House (Chicago, IL)</td>
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<td>266,000</td>
</tr>
<tr>
<td>Quality Meats (New York, NY)</td>
<td>$17,263,000</td>
<td>179,422</td>
</tr>
<tr>
<td>Chicago Cut Steakhouse (Chicago, IL)</td>
<td>$17,200,000</td>
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<tr>
<td>Abe &amp; Louie’s (Boston, MA)</td>
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<tr>
<td>‘21’ Club (New York, NY)</td>
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<tr>
<td>Guy's American Kitchen &amp; Bar (New York, NY)</td>
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<td>405,000</td>
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<tr>
<td>Tavern on the Green (New York, NY)</td>
<td>$17,000,000</td>
<td>280,000</td>
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<tr>
<td>Taste of Texas (Houston, TX)</td>
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<tr>
<td>Beauty &amp; Essex (New York, NY)</td>
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<td>268,012</td>
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<tr>
<td>Gibsons Bar &amp; Steakhouse (Rosemont, IL)</td>
<td>$16,868,128</td>
<td>256,892</td>
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<tr>
<td>Aria Cafe (Las Vegas, NV)</td>
<td>$16,860,000</td>
<td>767,000</td>
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<tr>
<td>Lavo Italian Restaurant (Las Vegas, NV)</td>
<td>$16,730,072</td>
<td>160,796</td>
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<tr>
<td>Grand Central Oyster Bar (New York, NY)</td>
<td>$16,650,000</td>
<td>314,000</td>
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<tr>
<td>Le Diplomate (Washington, DC)</td>
<td>$16,256,705</td>
<td>305,444</td>
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<tr>
<td>Spice Market (New York, NY)</td>
<td>$16,150,000</td>
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<tr>
<td>Blue Water Grill (New York, NY)</td>
<td>$16,150,000</td>
<td>218,000</td>
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<tr>
<td>Chops Lobster Bar (Atlanta, GA)</td>
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<tr>
<td>Top of the World (Las Vegas, NV)</td>
<td>$16,000,000</td>
<td>175,000</td>
</tr>
<tr>
<td>Parc (Philadelphia, PA)</td>
<td>$15,984,068</td>
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<tr>
<td>SkyCity at the Needle (Seattle, WA)</td>
<td>$15,900,000</td>
<td>274,000</td>
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<tr>
<td>The Rustic Inn (Fort Lauderdale, FL)</td>
<td>$15,900,000</td>
<td>567,000</td>
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<tr>
<td>Keens Steakhouse (New York, NY)</td>
<td>$15,900,000</td>
<td>182,700</td>
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<tr>
<td>Wolfgang Puck Grand Cafe (Orlando, FL)</td>
<td>$15,850,000</td>
<td>396,000</td>
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<tr>
<td>The Bazaar by José Andrés (Beverly Hills, CA)</td>
<td>$15,800,000</td>
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<tr>
<td>Quality Italian (New York, NY)</td>
<td>$15,622,000</td>
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<td>Balthazar (New York, NY)</td>
<td>$15,600,000</td>
<td>230,000</td>
</tr>
<tr>
<td>Sequoia (Washington, DC)</td>
<td>$15,550,000</td>
<td>317,000</td>
</tr>
<tr>
<td>The Boathouse (Orlando, FL)</td>
<td>$15,211,632</td>
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<tr>
<td>The Smith - Midtown (New York, NY)</td>
<td>$15,210,000</td>
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<tr>
<td>Harry Caray's Italian Steakhouse (Chicago, IL)</td>
<td>$15,100,000</td>
<td>314,000</td>
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<tr>
<td>Scoma’s (San Francisco, CA)</td>
<td>$15,092,497</td>
<td>323,000</td>
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<tr>
<td>Boa Steakhouse (West Hollywood, CA)</td>
<td>$14,870,355</td>
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<tr>
<td>Zehnder's of Frankenmuth (Frankenmuth, MI)</td>
<td>$14,802,943</td>
<td>967,298</td>
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<tr>
<td>Acme Feed &amp; Seed (Nashville, TN)</td>
<td>$14,765,496</td>
<td>640,000</td>
</tr>
<tr>
<td>Gibsons Bar &amp; Steakhouse (Oak Brook, IL)</td>
<td>$14,731,787</td>
<td>230,343</td>
</tr>
<tr>
<td>Hugo’s Frog Bar &amp; Fish House (Chicago, IL)</td>
<td>$14,708,983</td>
<td>208,648</td>
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<tr>
<td>The Lobster House (Cape May, NJ)</td>
<td>$14,700,000</td>
<td>306,000</td>
</tr>
<tr>
<td>Coffee Shop (New York, NY)</td>
<td>$14,700,000</td>
<td>560,000</td>
</tr>
<tr>
<td>Portland City Grill (Portland, OR)</td>
<td>$14,651,911</td>
<td>213,000</td>
</tr>
<tr>
<td>Jean-Georges Steakhouse (Las Vegas, NV)</td>
<td>$14,650,000</td>
<td>135,000</td>
</tr>
</tbody>
</table>

*RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019*
<table>
<thead>
<tr>
<th>Restaurant Name</th>
<th>Total Sales</th>
<th>Year-end Gross Profit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harris Ranch Inn &amp; Restaurant (Coalinga, CA):</td>
<td>$14,625,584</td>
<td>541,705</td>
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<td>Gladstones (Pacific Palisades, CA):</td>
<td>$14,500,000</td>
<td>316,000</td>
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<tr>
<td>Delmonico Steakhouse (Las Vegas, NV):</td>
<td>$14,300,000</td>
<td>165,000</td>
</tr>
<tr>
<td>The Four Seasons (New York, NY):</td>
<td>$14,200,000</td>
<td>106,000</td>
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<tr>
<td>Cliff House (San Francisco, CA):</td>
<td>$14,126,100</td>
<td>251,000</td>
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<tr>
<td>Frankenmuth Bavarian Inn (Frankenmuth, MI):</td>
<td>$14,080,117</td>
<td>845,921</td>
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<tr>
<td>Junior’s - Brooklyn (New York, NY):</td>
<td>$14,073,830</td>
<td>612,000</td>
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<tr>
<td>The Source (Washington, DC):</td>
<td>$14,000,000</td>
<td>210,000</td>
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<td>Carmine’s (Atlantic City, NJ):</td>
<td>$13,871,327</td>
<td>101,866</td>
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<td>Atlanta Fish Market (Atlanta, GA):</td>
<td>$13,815,390</td>
<td>267,000</td>
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<td>N9NE Steakhouse (Las Vegas, NV):</td>
<td>$13,750,000</td>
<td>170,000</td>
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<tr>
<td>Virgil’s Real Barbecue (New York, NY):</td>
<td>$13,681,113</td>
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<td>Mike’s “American” (Springfield, VA):</td>
<td>$13,650,000</td>
<td>460,000</td>
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<td>Quartino Ristorante &amp; Wine Bar (Chicago, IL):</td>
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<tr>
<td>Makoto (Bal Harbour, FL):</td>
<td>$13,428,258</td>
<td>242,751</td>
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<tr>
<td>Tavern on Rush (Chicago, IL):</td>
<td>$13,363,304</td>
<td>345,773</td>
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<tr>
<td>Boulevard (San Francisco, CA):</td>
<td>$13,250,000</td>
<td>179,000</td>
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<tr>
<td>Carpaccio (Bal Harbour, FL):</td>
<td>$13,200,000</td>
<td>250,000</td>
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<td>The Southern Steak &amp; Oyster (Nashville, TN):</td>
<td>$13,158,586</td>
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<td>George’s at the Cove (La Jolla, CA):</td>
<td>$13,150,000</td>
<td>156,000</td>
</tr>
<tr>
<td>Cut (Las Vegas, NV):</td>
<td>$13,100,000</td>
<td>106,000</td>
</tr>
<tr>
<td>Paradise Cove Beach Cafe (Malibu, CA):</td>
<td>$13,033,723</td>
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<tr>
<td>Franciscan Crab Restaurant (San Francisco, CA):</td>
<td>$12,942,913</td>
<td>250,000</td>
</tr>
<tr>
<td>Cafe Fiorello (New York, NY):</td>
<td>$12,900,000</td>
<td>233,000</td>
</tr>
<tr>
<td>Daniel (New York, NY):</td>
<td>$12,800,000</td>
<td>86,000</td>
</tr>
<tr>
<td>Greek Islands (Chicago, IL):</td>
<td>$12,200,000</td>
<td>390,000</td>
</tr>
<tr>
<td>Timberline Steaks and Grille (Denver, CO):</td>
<td>$12,150,000</td>
<td>803,000</td>
</tr>
</tbody>
</table>

55.2 Market Resources

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

56.1 Largest Multi-Brand Restaurant Companies

Ranked by annual U.S. systemwide sales, the following are the largest restaurant companies operating multiple chain brands (source: 2016 Directory of Chain Restaurant Operators, published by Chain Store Guide [www.chainstoreguide.com]):

- **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

- **CKE Restaurants** (www.ckerestaurants.com): $1.4 billion
  Brands: Carl’s Jr., Green Burrito, Hardees

- **American Blue Ribbon Holdings** (www.abrholdings.com): $1.3 billion
Brands: Bakers Square, Max & Erma’s, Ninety Nine Restaurants, O’Charley’s, Village Inn

- Ovation Brands (www.ovationbrands.com): $ 835 million
  Brands: Fire Mountain, HomeTown Buffet, Old Country Buffet, Ryan’s Family Steak House, Tahoe Joe’s
57 TOP MULTI-CONCEPT OPERATORS

57.1 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.

57.2 Largest Multi-Concept Operators
Ranked by annual sales, the following are the largest multi-concept operators (source: Directory of Chain Restaurant Operators (2016 Edition), 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

57.3 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: $36.0 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: $145.8 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: $138.0 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: $66.9 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: $120.4 million
• Brands: Barn at Rocky Fort Creek, 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: $75.0 million

Charlie Palmer Group (New York, NY; www.charliepalmer.com)
• Areas of operation: CA, DC, NV, NY, TX
• Annual sales: $81.7 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: $124.7 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: $102.8 million
• Brands: 30Tables, 360, Basso, Brasserie, Central, Cibo Matto, Eight Up, Flip, HDT, IOS Greek Kitchen, Juniper and Ivy, Lobby at Twelve, LPC, Luma on the Park, Max’s Coal Fired Oven Pizzeria, Murphy’s, ONE Midtown Kitchen, Prato, Roof, Room at Twelve, State & Lake, Stats, Tap, The Market at Cheshire, The Painted Pin, The Restaurant, 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: $210.0 million
• Brands: Black Oak Grill, 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, Cherokee Grill, Chesapeake’s, Copper Cellar, Cumberland Grill, Smoky Mountain Brewery

Esquared Hospitality (New York, NY; www.e2hospitality.com)
• Areas of operation: AZ, CA, DC, FL, GA, HI, IL, MO, NC, NV, NY
• Annual sales: $61.1 million

**Fireman Hospitality Group** (New York, NY; [www.thefiremangroup.com](http://www.thefiremangroup.com))
- Area of operation: NY
- Annual sales: $51.0 million
- Brands: Bond 45, Brooklyn Diner Times Square, Brooklyn Diner USA, Cafe Fiorello’s, Fiorella Pizzeria E Caffe, Redeye Grill, Trattoria dell’Arte

**Fox Restaurant Concepts** (Phoenix, AZ; [www.foxrc.com](http://www.foxrc.com))
- Areas of operation: AZ, CA, CO, GA, KS, NV, TX, VA
- Annual sales: $163.1 million

**Gibson Restaurant Group** (Chicago, IL; [www.gibsonssteakhouse.com](http://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](http://www.greatamericanrestaurants.com))
- Area of operation: VA
- Annual sales: $61.2 million
- Brands: Artie’s, Best Buns Bread, Carlyle, Coastal Flats, Jackson’s, Mike’s American Grill, Ozzie, Silverado, Sweetwater Tavern

**Grill Concepts Inc.** (Woodlands, CA; [www.dailygrill.com](http://www.dailygrill.com))
- Areas of operation: CA, CO, DC, FL, GA, IL, OK, OR, TX)
- Annual sales: $109.6 million
- Brands: Daily Grill, In Short Order, Public School on Tap, The Grill on the Alley

**Haddad Restaurant Group** (Kansas City, MO; [www.winsteadsteakburger.com](http://www.winsteadsteakburger.com))
- Areas of operation: AL, KS, MA, MO
- Annual sales: $39.0 million
- Brands: Fred P. Ott’s Bar & Grill, Plaza III The Steakhouse, Timbercreek Bar & Grill, Winstead’s

**Hal Smith Restaurant Group** (Norman, OK; [www.eshrg.com](http://www.eshrg.com))
- Areas of operation: AR, AZ, FL, IN, KS, MD, NE, OK, TX, VA
- Annual sales: $97.4 million
• Brands: 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

Heart of America Group (Moline, IL; www.heartofamericagroup.com)
• Areas of operation: IA, IL, KS, MN, NE, WI
• Annual sales: $70.4 million
• Brands: Grammas Kitchen/Checkered Flag, Johnny’s Italian Steakhouse, Machine Shed, The J Bar, Thunder Bay Grille

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: $412.7 million
• Brands: Bandera, Cherry Creek Grill, East Hampton Grill, Grill at Bel Harbour, Gulfstream, Hillstone, Houston’s, Los Altos Grill, Palm Beach Grill, R + D Kitchen, Rutherford Grill, South Beverly Grill, Woodmont Grill

Home Grown Hospitality (Charleston, SC; www.hghosp.com)
• Areas of operation: GA, NC, SC
• Annual sales: $36.3 million
• Brands: Capriz Italian Fest, Flying Fish, Kaminsky’s Dessert Cafe, Liberty Brewery & Grill, Liberty Tap Room & Grill, Pearl Vista, Pearlz Oyster Bar, T-Bonz Gill & 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: $352.0 million

King’s Seafood Co. (Costa Mesa, CA; www.kingsseafood.com)
• Areas of operation: AZ, CA, NV
• Annual sales: $53.5 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: $2.11 billion

Lawry’s Restaurants Inc. (Pasadena, CA; www.lawrysonline.com)
• Areas of operation: CA, IL, NV, TX
• Annual sales: $49.5 million
• Brands: Five Crowns, Lawry’s Carvery, Lawry’s The Prime Rib, SideDoor, The Tam O’Shanter

Lettuce Entertain You Enterprises (Chicago, IL; www.leye.com)
• Areas of operation: AZ, CA, IL, MN, NV, VA
• Annual sales: $505.0 million
• Brands: Antico Posto, Beatrix, Big Bowl Fresh Chinese and Thai, Bub City, Cafe Baba-Reeba!, Community Canteen, Di Pescara, Don & Charlie’s, Eiffel Tower Restaurant, El Segundo Sol Taqueria & Margarita Bar, Everest, foodlife, Frankie’s Scaloppine & Fifth Floor Pizzeria, Hub 51, Joe’s Seafood, Prime Steak, and Stone Crab, L. Woods Tap & Pine Lodge, L20, M Burger, M Street Kitchen, Maggiano’s Little Italy, Mity Nice Grill, Mon Ami Gabi, Nacional 27, Osteria via Stato, Paris Club, Petterino’s, Pizzeria via Stato, R.J. Grunts, Reel Club, RPM Pizza, Saranello’s, Scoozil, Shaw’s Crab House, Stella Rossa Pizza Bar, Stripburger, The Magic Pan Crepe Stand, Tokio Pub, Tru, Tucci Benucc, Twin City Grill, Wildfire, Wow Bao

Lyons Group Ltd. (Boston, MA; http://gameonboston.com)
• Areas of operation: CT, FL, IL, MA, NJ
• Annual sales: $61.0 million
• Brands: Alibi, Backbay Social Club, Five Roses, Game On, Harvard Gardens, Kings Bowl, Lorettas, Lucky’s, Mass Ave, Scampo, Sonsie, Sweetwater Cafe, Towne

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](http://www.mcmenamins.com))
- Areas of operation: OR, WA
- Annual sales: $116.0 million

**Moana Restaurant Group** (San Rafael, CA; [www.molinarestaurant.com](http://www.molinarestaurant.com))
- Areas of operation: CA, HI, OR
- Annual sales: $67.5 million
- Brands: Corners Tavern, Cupola Pizzeria, El Dorado Kitchen, Kacienda Cocina y Cantina, Larks Creek, Molina, Paragon Restaurant & Bar, Parcel 104, Platti Ristorante & Bar, Plantation Gardens, Purple Palm, REDD, REED Wood, Stone Brewing World Bistro & Gardens, The Farmers Union, Yankee Pier

**Pappas Restaurants** (Houston, TX; [www.pappadeaux.com](http://www.pappadeaux.com))
- Areas of operation: AZ, CO, GA, IL, NM, OH, TX
- Annual sales: $615.0 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](http://www.patinagroup.com))
- Areas of operation: CA, FL, NV, NY
- Annual sales: $171.1 million
- Brands: Brasserie, Brasserie 8 ½, C+M at LACA, Café at the Opera, Café Centro, Café Descanso at Descanso Gardens, Café Pinot, Catal Restaurant & UVA Bar, Concert Hall Café, Cucina & CO, Kendell’s Brasserie, LACMA Café, La Fonda Del

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: $120.6 million
- Brands: 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

Select Restaurants (Cleveland, OH; www.selectrestaurants.com)
- Areas of operation: CA, IL, MA, MD, OH, PA
- Annual sales: $54.5 million
- Brands: Black Powder Tavern, County Line Tavern, 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: $123.6 million

Starr Restaurant Organization (Philadelphia, PA; www.starr-organization.com)
- Areas of operation: FL, NJ, NY, PA
- Annual sales: $188.8 million

Tavistock Restaurants (Austin, TX; www.tavistock.com)
- Areas of operation: AR, AZ, CA, CT, FL, IN, KS, MA, MD, MN, MO, NH, NJ, OK, PA, RI, TX
The Glazier Group (New York, NY; www.theglaziergroup.com)
- Areas of operation: FL, NJ, NY
- Annual sales: $42.8 million
- Brands: Michael Jordan’s The Steak House, Strip House

ThinkFood Group (Washington, DC; www.thinkfoodgroup.com)
- Areas of operation: CA, DC, FL, MD, NV, VA
- Annual sales: $79.1 million
- Brands: America Eats Tavern, Bazaar Meat, Beefsteak, China Chilcano, China Poblano, E by Jose Andres, Jaleo, Ku Noodle, Mi Casa, mini bar by jose andres, Pyamal, The Bazaar by Jose Andres, Tres by Jose Andres, Zaytinya

Thomas Keller Restaurant Group (Yountville, CA; www.bouchon.com)
- Areas of operation: CA, NV, NY
- Annual sales: $33.3 million
- Brands: Ad Hoc, Bouchon Beverly Hills, Bouchon Las Vegas, Bouchon Rockefeller Center, Bouchon Time Warner Center, Bouchon Yountville, Per Se, The French Laundry

Todd English Enterprises (Boston, MA; www.toddenglish.com)
- Areas of operation: AL, CT, FL, MA, NV, NY
- Annual sales: $78.9 million
- Brands: BlueZoo, BonFire, Ca Va Brasserie, Figs, Olives, Todd English Food Hall, Todd English P.U.B., Todd English Tuscany

Tour de France (New York; NY; 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

T S Restaurants (Lahaina, HI; www.tsrestaurants.com)
- Areas of operation: CA, HI
- Annual sales: $103.4 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
Villa Restaurant Group (Morristown, NJ; www.villarestaurantgroup.com)
- Areas of operation: AK, AL, AR, AZ, CA, CO, CT, DC, DE, FL, GA, IA, ID, IL, IN, KS, KY, LA, MA, MD, ME, MI, MO, MS, NC, NH, NJ, NM, NV, NY, OK, OR, PA, RI, SC, TN, TX, UT, VA, VT, WA
- Annual sales: $74.7 million

Wolfgang Puck Inc. (Beverly Hills, CA; www.wolfgangpuck.com)
- Areas of operation: AZ, CA, CO, DC, FL, GA, HI, IL, IN, KY, MA, MI, NC, NV, NJ, NY, OH, OK, RI, TX, UT, WA
- Annual sales: $167.8 million

57.4 Market Resources
Chain Store Guide, 10117 Princess Palm Avenue, Suite 375, Tampa, FL 33610. (800) 927-9292. (www.chainstoreguide.com)
58

TOP NIGHTCLUBS & BARS

58.1 Top Clubs

_Nightclub & Bar Magazine_ ranked the top clubs in the United States by estimated revenue 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 Sharkeezy (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

58.2 Market Resources
Nightclub & Bar Magazine, 275 Grove Street, Suite 2-130 Newton, MA 02466.
(www.nightclub.com)
PART VIII:  NEW & EMERGING RESTAURANT BRANDS
BEST NEW RESTAURANTS

59.1 Lists For 2016-2017

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

**Bon Appétit**

Best New Restaurants In America 2017
- Afuri (Portland, OR)
- Alma (Minneapolis, MN)
- Annette (Aurora, CO)
- Aska (Brooklyn, NY)
- Bar Normandy (Charleston, SC)
- Bastion (Nashville, TN)
- Brewery Bhavana (Raleigh, NC)
- Bucktown (Providence, RI)
- Dame (Portland, OR)
- Denver Central Market (Denver, CO)
- Destroyer (Los Angeles, CA)
- Elske (Chicago, IL)
- Giant (Chicago, IL)
- Güero (Portland, OR)
- Hart’s (Brooklyn, NY)
- Henrietta Red (Nashville, TN)
- Himitsu (Washington, D.C.)
- June’s All Day (Austin, TX)
- Kemuri (Austin, TX)
- Kismet (Los Angeles, CA)
- Le Coucou (New York, NY)
- Little Jack’s Tavern (Charleston, SC)
- Mamaleh’s (Cambridge, MA)
- Marjie’s Grill (New Orleans, LA)
- Marmite (Seattle, WA)
- Martin’s BBQ (Nashville, TN)
- Mean Sandwich (Seattle, WA)
- Mi Tocaya Antojeria (Chicago, IL)
- Mister Jiu’s (San Francisco, CA)
- Nina June (Rockport, ME)
- Nixta (St. Louis, MO)
- Olmsted (Brooklyn, NY)
- P.Y.T. (Los Angeles, CA)
- Palizzi Social Club (Philadelphia, PA)
- Pineapple & Pears (Washington, D.C.)
- Red Hog (Louisville, KY)
- Res Ipsa (Philadelphia, PA)
- Rodney Scott’s BBQ (Charleston, SC)
- Saint Leo (Oxford, MS)
- Shibumi (Los Angeles, CA)
- Single Thread (Healdsburg, CA)
- Smyth and The Loyalist (Chicago, IL)
- Spring (Marietta, GA)
- Tartine Manufactory (San Francisco, CA)
- The Antler Room (Kansas City, MO)
- The Purple House (North Yarmouth, ME)
- Timber Pizza Company (Washington, D.C.)
- Turkey and the Wolf (New Orleans, LA)
- Tusk (Portland, OR)
- Vicia (St. Louis, MO)

**Eater** (www.eater.com)

The 12 Best New Restaurants in America - June 2017
- Elske (Chicago, IL)
- Felix Trattoria (Los Angeles, CA)
- Himitsu (Washington, DC)
- In Situ (San Francisco, CA)
- J.C. Holdway (Knoxville, TN)
- JuneBaby (Seattle, WA)
- Kemuri Tatsu-ya (Austin, TX)
- The Grill (New York, NY)
- Turkey and the Wolf (New Orleans, LA)
- Vicia (St. Louis, MO)
- Xochi (Houston, TX)
- Young Joni (Minneapolis, MN)

**Gayot** (www.gayot.com)

2016 Best New Restaurants In The U.S.
- Alter (Miami FL)
- Gabriel Kreuther (New York NY)
- Helen Greek Food and Wine (Houston TX)
- Kindred (Davidson NC)
- Kinship (Washington, DC)
- Monteverde (Chicago IL)
• Rivea (Las Vegas NV)
• Spring (Los Angeles CA)
• Taylor Railworks (Portland OR)

GQ
The 10 Best New Restaurants In America - 2017
• Commis (Oakland, CA)
• Flour + Water (San Francisco, CA)
• Grner (Portland, OR)
• Lincoln (New York, NY)
• Longman Eagle (Chicago, IL)
• Menton (Boston, MA)
• The Walrus and the Carpenter (Seattle, WA)
• The Kitchen at Brooklyn Fare (Brooklyn, NY)
• The Tasting Kitchen (Venice, CA)
• Uchiko (Austin, TX)

James Beard Foundation
The Best New Restaurant in the U.S.: 2017
• Winner: Le Coucou, New York, NY
• Nominee: In Situ (San Francisco, CA)
• Nominee: Olmsted (Brooklyn, NY)
• Nominee: Pineapple and Pearls (Washington, DC)
• Nominee: Tartine Manufactory (San Francisco, CA)

Thrillist (www.thrillist.com)
Best New Restaurants In America - December 2016
• 8 Arm (Atlanta, GA)
• Aina (San Francisco, CA)
• Bastion (Nashville, TN)
• Erven (Santa Monica, CA)
• Giant (Chicago, IL)
• Han Oak (Portland, OR)
• Katoi (Detroit, MI)
• Kenton’s (New Orleans, LA)
• Lilia Brooklyn, (New York, NY)
• Morcilla (Pittsburgh, PA)
• Pineapple and Pearls (Washington, DC)
• Tawla (San Francisco, CA)

Time
• Brewer’s Table at Surly Brewing (Minneapolis, MN)
• Cala (San Francisco, CA)
• Death & Taxes (Raleigh, NC)
• High Street on Hudson (New York, NY)
• Launderette (Austin, TX)
• Locol (Los Angeles, CA)
• Monteverde Restaurant & Pastificio (Chicago, IL)
• Shaya (New Orleans, LA)
• The Dabney (Washington (DC)
• Townsman (Boston, MA)

USA Today Readers’ Choice
Best New Restaurant Winners: 2016
• Butchertown Grocery (Louisville, KY)
• Double Knot (Philadelphia, PA)
• FLX Table (Geneva, NY)
• Hat Yai (Portland, OR)
• Herb & Wood (San Diego, CA)
• Local Provisions (Asheville, NC)
• Loquita (Santa Barbara, CA)
• The Marsh House (Nashville, TN)
• The Grass Skirt (San Diego, CA)
• UPTON 43 (Minneapolis, MN)

Zagat (www.zagat.com)
The Hottest New Restaurants In 15 American Cities - July 2017
• Better Luck Tomorrow (Houston, TX)
• Cultivar (Boston, MA)
• Dumpling Time (San Francisco, CA)
• El Chipirón (Austin, TX)
• Federal Donuts (Miami, FL)
• Felix (Los Angeles, CA)
• Food Terminal (Atlanta, GA)
• Hundred Proof (San Diego, CA)
• Iconiq (Seattle, WA)
• IdleRye (Dallas, TX)
• Maison 208 (Philadelphia, PA)
• Proxi (Chicago, IL)
• Señor Bear (Denver, CO)
• The Grill (New York, NY)
• The Salt Line (Washington, DC)
60.1 Overview
Since 2013, Nation’s Restaurant News has identified Breakout Brands, defined as restaurant brands that are on the leading edge of restaurant trends.

60.2 Breakout Brands 2017
The following are the 2017 Breakout Brands:
• East Hampton Sandwich Co.
• Holler & Dash
• Ruby Slipper Cafe
• Salt & Straw
• Starbird
• Tacodeli
• The Crab Shack
• The Tati Roll Company

“The 2017 class of Breakout Brands includes some of the buzziest concepts in foodservice. These are the brands the restaurant industry is talking about – or should be talking about”

Nation’s Restaurant News, 3/13/17

60.3 Recent Designations
The following are recently designated Breakout Brands:

2016
• 3 Arts Club Cafe
• By Chloe
• Eatsa
• Flower Child
• Havana 1957
• Intelligentsia Coffee
• Sweetfin Poké
• Tava Kitchen
• Uchi
• Xi’an Famous Foods
### 2015
- 100 Montaditos
- Chicken Salad Chick
- Cream
- Dog Haus
- Eureka!
- Lemonade
- Native Foods Cafe
- Punch Bowl Social
- Rock & Brews
- Rusty Taco

### 2014
- 4 Rivers
- Barcelona
- Bareburger
- Burger Lounge
- Firebirds Wood Fired Grill
- Rusty Bucket
- Snap Kitchen
- Sweetgreen
- Tazikis
- Tom + Chee

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**60.4 Market Resources**

*Nation’s Restaurant News*, 249 W. 17th Street, New York, NY 10011. (212) 204-4200. (www.nrn.com)
61.1 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).

61.2 Fastest-Growing Chains 2017

The 2017 Future 50 are as follows:

<table>
<thead>
<tr>
<th>Chain</th>
<th>Sales</th>
<th>Growth</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Halal Guys</td>
<td>$25.2 million</td>
<td>740.0%</td>
<td>35</td>
</tr>
<tr>
<td>Bubba’s 33</td>
<td>$43.7 million</td>
<td>133.7%</td>
<td>16</td>
</tr>
<tr>
<td>Cava Grill</td>
<td>$26.8 million</td>
<td>76.3%</td>
<td>25</td>
</tr>
<tr>
<td>HopCat</td>
<td>$30.2 million</td>
<td>57.3%</td>
<td>13</td>
</tr>
<tr>
<td>Luna Grill</td>
<td>$36.9 million</td>
<td>58.4%</td>
<td>35</td>
</tr>
<tr>
<td>Ike’s Place</td>
<td>$32.4 million</td>
<td>42.7%</td>
<td>34</td>
</tr>
<tr>
<td>Jinya Ramen Bar</td>
<td>$39.4 million</td>
<td>42.8%</td>
<td>20</td>
</tr>
<tr>
<td>Vitality Bowls</td>
<td>$32.4 million</td>
<td>58.1%</td>
<td>33</td>
</tr>
<tr>
<td>Kung Fu Tea</td>
<td>$35.2 million</td>
<td>51.1%</td>
<td>90</td>
</tr>
<tr>
<td>California Fish Grill</td>
<td>$34.0 million</td>
<td>25.9%</td>
<td>17</td>
</tr>
<tr>
<td>Snooze. an A.M. Eatery</td>
<td>$27.5 million</td>
<td>45.5%</td>
<td>20</td>
</tr>
<tr>
<td>&amp;pizza</td>
<td>$26.1 million</td>
<td>69.5%</td>
<td>20</td>
</tr>
<tr>
<td>Piada Italian Street Food</td>
<td>$33.4 million</td>
<td>49.8%</td>
<td>38</td>
</tr>
<tr>
<td>Pies &amp; Pints</td>
<td>$30.3 million</td>
<td>46.4%</td>
<td>12</td>
</tr>
<tr>
<td>Burger Lounge</td>
<td>$28.8 million</td>
<td>33.3%</td>
<td>21</td>
</tr>
<tr>
<td>Pressed Juicery</td>
<td>$37.7 million</td>
<td>46.1%</td>
<td>87</td>
</tr>
<tr>
<td>Keke’s Breakfast Cafe</td>
<td>$32.8 million</td>
<td>49.8%</td>
<td>25</td>
</tr>
<tr>
<td>85C Bakery Cafe</td>
<td>$29.2 million</td>
<td>40.4%</td>
<td>25</td>
</tr>
<tr>
<td>Gus’s World Famous Fried Chicken</td>
<td>$33.9 million</td>
<td>44.9%</td>
<td>19</td>
</tr>
<tr>
<td>Your Pie</td>
<td>$30.8 million</td>
<td>38.7%</td>
<td>35</td>
</tr>
<tr>
<td>True Food Kitchen</td>
<td>$39.7 million</td>
<td>28.1%</td>
<td>16</td>
</tr>
<tr>
<td>b.good</td>
<td>$36.0 million</td>
<td>55.2%</td>
<td>40</td>
</tr>
<tr>
<td>hopdoddy Burger Bar</td>
<td>$36.3 million</td>
<td>55.8%</td>
<td>17</td>
</tr>
<tr>
<td>Andy’s Frozen Custard</td>
<td>$42.4 million</td>
<td>36.8%</td>
<td>40</td>
</tr>
<tr>
<td>Kula Revolving Sushi Bar</td>
<td>$25.3 million</td>
<td>33.9%</td>
<td>11</td>
</tr>
<tr>
<td>Cowboy Chicken</td>
<td>$29.5 million</td>
<td>39.8%</td>
<td>22</td>
</tr>
</tbody>
</table>
• Sauce Pizza & Wine: $25.5 million 26.9% 15
• Fresh Brothers: $26.2 million 29.1% 19
• Public School: $25.5 million 57.4% 8
• The Brass Tap: $43.8 million 54.8% 40
• Chicken Salad Chick: $45.5 million 24.7% 63
• Tin Lizzy’s Cantina: $30.8 million 40.6% 13
• Just Salad: $27.1 million 38.3% 26
• Bone Daddy’s House of Smoke: $32.8 million 14.7% 9
• Wokcano Asian Restaurant & Lounge: $26.4 million 25.1% 9
• Moe’s Original Bar B Que: $33.9 million 27.0% 51
• Karl Strauss Brewing Company: $39.1 million 10.9% 10
• III Forks: $36.9 million 21.4% 10
• Blue Sushi Sake Grill: $27.9 million 32.9% 10
• Caffebene: $45.2 million 39.1% 50
• Atomic Wings: $31.4 million 18.9% 27
• Paul Martin’s American Grill: $47.2 million 20.4% 11
• The Matador: $37.6 million 27.0% 11
• Walk-On’s Bistreaux & Bar: $32.0 million 12.3% 11
• Scotty’s Brewhouse: $48.7 million 28.8% 17
• Burtons Grill: $49.7 million 10.9% 12
• bartaco: $40.7 million 32.1% 12
• City BBQ: $39.9 million 15.7% 31
• Roti Modern Mediterranean: $39.7 million 17.5% 25
• Verts Mediterranean Grill: $28.1 million 28.3% 28

61.3 Market Resources
Restaurant Business, One Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181. (630) 574-5075. (www.restaurantbusinessonlin.com)

Technomic, Inc., 300 South Riverside Plaza, Suite 1200, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)
62

HOT CONCEPTS

62.1 Hot Concepts 2017
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 2017:
• Bibipop Asian Grill
• Bubba’s 33
• Flower Child
• New Bohemia
• Public School on Tap

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

2016
• Honeygrow
• Naf Naf Grill
• Nekter Juice Bar
• The Little Beet
• Velvet Taco

2015
• Bareburger
• Cava Mezze Grill
• Eureka!
• Tortas Fronteria
• VertsKebap

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.
63

THE NEXT 20

63.1 Overview
In conjunction with its assessment of the Top 200 restaurant chains, 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.

63.2 2017’s Next 20
The following is the 2017 list of The Next 20 restaurant chains:

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Fuzzy’s Taco Shop:</td>
<td>$144.7 million</td>
<td>29.1%</td>
<td>107</td>
</tr>
<tr>
<td>Firebirds Wood Fired Grill:</td>
<td>$143.9 million</td>
<td>6.1%</td>
<td>42</td>
</tr>
<tr>
<td>Flanigan’s Seafood Bar &amp; Grill:</td>
<td>$113.9 million</td>
<td>4.8%</td>
<td>24</td>
</tr>
<tr>
<td>The Greene Turtle:</td>
<td>$109.2 million</td>
<td>11.4%</td>
<td>44</td>
</tr>
<tr>
<td>Carvel Ice Cream:</td>
<td>$102.9 million</td>
<td>0.3%</td>
<td>342</td>
</tr>
<tr>
<td>The Flame Burger:</td>
<td>$102.6 million</td>
<td>4.5%</td>
<td>185</td>
</tr>
<tr>
<td>Eureka!</td>
<td>$  69.0 million</td>
<td>41.4%</td>
<td>21</td>
</tr>
<tr>
<td>Redlands Grill</td>
<td>$  58.5 million</td>
<td>58.2%</td>
<td>12</td>
</tr>
<tr>
<td>Chicken Salad Chick:</td>
<td>$  54.3 million</td>
<td>68.6%</td>
<td>64</td>
</tr>
<tr>
<td>Hacienda Mexican Restaurants:</td>
<td>$  45.1 million</td>
<td>0.0%</td>
<td>13</td>
</tr>
<tr>
<td>Nekter Juice Bar:</td>
<td>$  43.5 million</td>
<td>18.5%</td>
<td>62</td>
</tr>
<tr>
<td>Sharky’s Woodfired Mexican Grill:</td>
<td>$  43.4 million</td>
<td>9.0%</td>
<td>25</td>
</tr>
<tr>
<td>MacKenzie River Pizza:</td>
<td>$  43.0 million</td>
<td>16.2%</td>
<td>24</td>
</tr>
<tr>
<td>Bad Daddy’s Burger Bar:</td>
<td>$  38.7 million</td>
<td>35.8%</td>
<td>19</td>
</tr>
<tr>
<td>Punch Bowl Social:</td>
<td>$  36.0 million</td>
<td>37.9%</td>
<td>8</td>
</tr>
<tr>
<td>Barberitos:</td>
<td>$  34.8 million</td>
<td>8.8%</td>
<td>46</td>
</tr>
<tr>
<td>Cowboy Chicken:</td>
<td>$  23.5 million</td>
<td>35.8%</td>
<td>21</td>
</tr>
<tr>
<td>Teriyaki Madness:</td>
<td>$  19.9 million</td>
<td>39.2%</td>
<td>35</td>
</tr>
<tr>
<td>Aubree’s Pizzeria &amp; Grill:</td>
<td>$  18.6 million</td>
<td>5.7%</td>
<td>16</td>
</tr>
<tr>
<td>Pizza 9:</td>
<td>$  13.9 million</td>
<td>8.6%</td>
<td>22</td>
</tr>
</tbody>
</table>
### 63.3 2016's Next 20

The following is the 2016 list of Next 20 restaurant chains (source: *Nation’s Restaurant News*):

<table>
<thead>
<tr>
<th>Restaurant Name</th>
<th>Systemwide Annual Sales</th>
<th>Growth</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lee’s Famous Recipe Chicken</td>
<td>$160.4 million</td>
<td>7.7%</td>
<td>134</td>
</tr>
<tr>
<td>Cooper’s Hawk Winery &amp; Restaurant</td>
<td>$147.9 million</td>
<td>26.3%</td>
<td>20</td>
</tr>
<tr>
<td>Wetzel’s Pretzels</td>
<td>$138.3 million</td>
<td>12.4%</td>
<td>281</td>
</tr>
<tr>
<td>Chart House Restaurants</td>
<td>$136.9 million</td>
<td>2.0%</td>
<td>29</td>
</tr>
<tr>
<td>Duffy’s Sports Grill</td>
<td>$114.2 million</td>
<td>20.5%</td>
<td>30</td>
</tr>
<tr>
<td>Blaze Pizza</td>
<td>$101.0 million</td>
<td>206.0%</td>
<td>105</td>
</tr>
<tr>
<td>Cotton Patch Cafe</td>
<td>$94.6 million</td>
<td>10.2%</td>
<td>45</td>
</tr>
<tr>
<td>Costa Vida Fresh Mexican Grill</td>
<td>$81.3 million</td>
<td>19.9%</td>
<td>72</td>
</tr>
<tr>
<td>Not Your Average Joe’s</td>
<td>$77.4 million</td>
<td>17.4%</td>
<td>25</td>
</tr>
<tr>
<td>STK</td>
<td>$77.1 million</td>
<td>22.3%</td>
<td>10</td>
</tr>
<tr>
<td>Pieology Pizzeria</td>
<td>$74.6 million</td>
<td>67.2%</td>
<td>78</td>
</tr>
<tr>
<td>True Food Kitchen</td>
<td>$71.5 million</td>
<td>22.6%</td>
<td>11</td>
</tr>
<tr>
<td>Monical’s Pizza</td>
<td>$64.9 million</td>
<td>5.5%</td>
<td>63</td>
</tr>
<tr>
<td>MOD Pizza</td>
<td>$64.8 million</td>
<td>220.7%</td>
<td>92</td>
</tr>
<tr>
<td>Pizza Factory</td>
<td>$60.8 million</td>
<td>11.5%</td>
<td>111</td>
</tr>
<tr>
<td>Another Broken Egg Cafe</td>
<td>$60.6 million</td>
<td>42.9%</td>
<td>51</td>
</tr>
<tr>
<td>Pie Five Pizza Co.</td>
<td>$55.1 million</td>
<td>117.7%</td>
<td>90</td>
</tr>
<tr>
<td>Stonefire Grill</td>
<td>$48.0 million</td>
<td>12.6%</td>
<td>8</td>
</tr>
<tr>
<td>Vocelli Pizza</td>
<td>$43.3 million</td>
<td>0.7%</td>
<td>88</td>
</tr>
<tr>
<td>Russo’s New York Pizzeria</td>
<td>$41.2 million</td>
<td>18.0%</td>
<td>36</td>
</tr>
</tbody>
</table>

### 63.4 Market Resources

*Nation’s Restaurant News*, 1166 Avenue of the Americas, 10th Floor, New York, NY 10036. (212) 204-4200. ([www.nrn.com](http://www.nrn.com))
TOP NEWCOMERS

64.1 Overview
Annually, Technomic (www.technomic.com) ranks the Top 500 restaurant chains by sales. The list of newcomers to the Top 500 is published by Restaurant Business.

64.2 Newcomers List 2017
The following were newcomers on Technomic’s June 2017 list:

<table>
<thead>
<tr>
<th>Rank</th>
<th>Sales</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>#463</td>
<td>$52.8 million</td>
<td>29</td>
</tr>
<tr>
<td>#405</td>
<td>$64.5 million</td>
<td>42</td>
</tr>
<tr>
<td>#473</td>
<td>$51.5 million</td>
<td>29</td>
</tr>
<tr>
<td>#412</td>
<td>$63.7 million</td>
<td>38</td>
</tr>
<tr>
<td>#498</td>
<td>$47.2 million</td>
<td>11</td>
</tr>
<tr>
<td>#461</td>
<td>$53.3 million</td>
<td>88</td>
</tr>
<tr>
<td>#350</td>
<td>$76.1 million</td>
<td>58</td>
</tr>
<tr>
<td>#458</td>
<td>$54.0 million</td>
<td>48</td>
</tr>
<tr>
<td>#464</td>
<td>$52.6 million</td>
<td>98</td>
</tr>
<tr>
<td>#491</td>
<td>$48.0 million</td>
<td>12</td>
</tr>
</tbody>
</table>

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

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

65.1 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.

65.2 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
• Show: Mexico: One Plate at a Time
• Restaurants: Frontera Grill, Topolobampo, XOCO, Frontera Fresco, Tortas Fronteras

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

Tom Colicchio
• Show: 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
• Shows: 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*
• Restaurant: AZ Canteen

### 65.3 Top-Earning Chefs

According to *Forbes*, the following are the top-earning chefs:

- Gordon Ramsay: $38 million
- Rachel Ray: $25 million
- Wolfgang Puck: $20 million
- Mario Batalli: $17 million
- Alain Ducasse: $18 million
- Todd English: $19 million
- Nobu Matsuhisa: $10 million
- Bobby Flay: $9 million
- Guy Fieri: $9 million

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
• Aldo Zilli: $ 10 million
• Buddy Valastro: $ 10 million
• Gino D’Acampo: $ 10 million
• Ming Tsai: $ 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
66.1 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 as of August 2017.

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.

66.2 Emphasis Among Restaurant Chefs

The National Restaurant Association (NRA, www.restaurant.org) surveys over 1,200 member chefs of the American Culinary Federation (ACF, www.acfchefs.org) annually asking them to rank menu trends.

Healthful-kids meals ranked #3 in 2017 and have been ranked in the Top 3 since 2010.

66.3 Healthful Kids’ Menus At QSRs

Driven by the Kids LiveWell Program, virtually all quick-service restaurants (QSRs) revamped their kids' menus several years ago.

According to the National Restaurant Association, healthful options in kids' meals ranks as the No. 8 trend in the QSR segment. 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 firmly in place. According to Datassential MenuTrends (www.datassential.com), 80% of restaurants that serve breakfast offer eggs, 71% offer pancakes and 62% feature French toast. Some items are becoming more popular on kids’ breakfast menus. There have been increases in protein-rich items such as omelets, which increased 25% in menu mentions in 2016 compared with the prior year, and yogurt, which increased 13%.

66.4 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.

Over 90,000 schools/institutions serve school breakfasts to 14.6 million students each day, including 11.5 million free breakfasts, 0.9 million reduced price breakfasts (student pays $0.30), and 2.2 million full price breakfasts. Federal reimbursements through the School Breakfast Program (SBP) total $4.2 billion.

According to the USDA, 5 billion lunches were served during the 2016-2017 academic year. Nearly 100,000 schools/institutions served school lunches to 30.4 million students each day that school was in session.

The National School Lunch Program (NSLP) serves 20.1 million free lunches and subsidizes 2.0 million reduced price lunches (student pays $0.40) each day. The annual cost is $13.6 billion. In addition, 8.2 million full price lunches are sold each day.

School meal prices vary widely across the country. Prices are set by local school districts, usually with school board oversight. According to the State of School Nutrition 2016 survey, by the School Nutrition Association (www.schoolnutrition.org), average prices paid for meals are as follows:

<table>
<thead>
<tr>
<th></th>
<th>Lunch</th>
<th>Breakfast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elementary</td>
<td>$2.34</td>
<td>$1.39</td>
</tr>
<tr>
<td>Middle</td>
<td>$2.54</td>
<td>$1.47</td>
</tr>
<tr>
<td>High</td>
<td>$2.60</td>
<td>$1.51</td>
</tr>
</tbody>
</table>

Costs are distributed as follows:

- Food: 37%
- Labor/benefits: 48%
- Supplies: 5%
- Other: 10%

School nutrition standards are posted at https://schoolnutrition.org/AboutSchoolMeals/SchoolNutritionStandards/.
66.5 Market Resources

School Nutrition Association, 120 Waterfront Street, Suite 300, National Harbor, MD 20745. (301) 686-3100. (www.schoolnutrition.org)
67.1 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.

67.2 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:

**Food-Related Travel**
- California
- Florida
- New York
- Texas
- North Carolina
- Georgia

**Wine-Related Travel**
- California
- New York
- Missouri
- North Carolina
- Oregon
- Pennsylvania

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

67.3 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.

### 67.4 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 bare 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 2016. 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.

67.5 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 2016; 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.

67.6 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)
68

DINING WITH ENTERTAINMENT

68.1 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.

68.2 Music-Themed Restaurants

Music-themed 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. Hard Rock Cafe has survived by downsizing, placing a priority on their food quality, and operating casino resorts. Planet Hollywood operates two casino resorts but no standalone restaurants.

The following are music-themed restaurant chains:
• 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.
- 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. The chain had 20 locations as of August 2017.
- 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.

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)

### 68.3 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. There 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.
- The decor of Jekyll & Hyde Pub (New York City, www.jekyllpub.com) includes gargoyles and coffins. The ghoulish entertainment includes live skits, animatronics,
and interactive puppets. Also offered by parent company Jekyll & Hyde Entertainment Group is Jekyll & Hyde of Greenwich Village, Shipwreck Tavern, The Slaughtered Lamb Pub, an adventure park and a “scream” park.

- Medieval Times (www.medievaltimes.com) is a nine-unit chain with restaurants set inside a faux 11th century castle. Guests experience all of the feasting, 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.

### 68.4 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)

### 68.5 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 by 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.
- 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.

68.6 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 (www.cirostampa.com). Staff dress the part, with ladies wearing flapper-style cocktail dresses and gents donning shirts and ties with rolled-up sleeves and suspenders.
- In Atlanta, Prohibition (www.prohibitionatl.com) is a swanky club with the feel of a 1920s underground speakeasy. Guests ask around at a nearby bar for a secret phone number and step into an antique phone booth to call for entry.
- In New York City, guests enter PDT [Please Don’t Tell] (www.pdtnyc.com) through a phone booth in Crif Dogs, a hot dog shop.
- In Alexandria, Virginia, the entrance to PX (www.eamonnsdublinchipper.com) is marked only by a pirate flag and blue light. Reservations may be made only online. Upon arrival, guests knock, a small window in the door opens, and their reservations are confirmed before entry.
- At Safe House (www.safe-house.com), a spy-themed restaurant and bar in Milwaukee, guests must recite a password for entry. The staff is really into the espionage mission, holding James Bond screenings and talking in spy lingo. International Exports Ltd., on North Front Street, is in fact a craftily contrived ‘front’ for the Safe House.
**68.7 Unique Concept Restaurants**

The tropical jungle-themed Rainforest Cafe, developed by Steve Schussler and launched in 1994, was sold to Landry’s Restaurants in 2000. Today, Landry’s operates 23 Rainforest Cafes in the United States and five abroad. Mr. Schussler also developed the vision for the dinosaur-themed T-Rex, in Kansas City, and Yak & Yeti, an Asian-theme concept which opened in 2008 in Disney’s Animal Kingdom. Both T-Rex and Yak & Yeti are also owned by Landry’s.

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

The “Breastaurant” concept has grown beyond just Hooters (www.hooters.com) and now includes Bikinis Sports Bar & Grill (www.bikinisportsbarandgrill.com), Brickhouse Tavern + Tap (www.brickhousetavernandtap.com), The Tilted Kilt (www.tiltedkilt.com), Twin Peaks (www.twinpeaksrestaurant.com), and more. This niche segment garners roughly $2 billion annually.

Several restaurants across the United States operate in restored fire stations. The National Trust for Historic Preservation (https://savingplaces.org/) recognizes the following as among the best examples of these restaurants.

- Engine Co. No. 28 (Los Angeles, CA)
- Fire House Restaurant (Harrisburg, PA)
- Firehouse Grille (Evanston, IL)
- Firehouse Restaurant (Portland, OR)
- Historical Firehouse Cafe (Hutchinson, KS)
- Jack’s Firehouse (Philadelphia, PA)
- The Firehouse Restaurant (Sacramento, CA)
- Two Steps Downtown Grille (Danbury, CT)

The following are other unique-themed restaurants:

- With the United States Army unit that fought on the Western Front during World War I as a theme, 94th Aero Squadron Restaurants operate in Miami (www.94thmiami.com) and Van Nuys (www.94thvannuys.com).
- 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.
- 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.

• 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.

• 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. It offers a menu inspired by the Victorian era.
69

DOG-FRIENDLY RESTAURANTS

69.1  **Overview**

The American Pet Products Association (www.americanpetproducts.org) estimates that approximately 60.2 million U.S. households (48% of all households) own a dog; spending on dogs was $66.8 billion in 2016.

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*

69.2  **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_

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

### 69.3 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 by 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.

### 69.4 Market Resources
American Pet Products Association, 255 Glenville Road, Greenwich, CT 06831. (203) 532-0000. (www.americanpetproducts.org)
70

FOOD & WINE FESTIVALS

70.1 Overview

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

70.2 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.fiestaffiveflags.org/pensacola-seafood-festival)
- RoadKill Cook-$Off (Marlinton, WV; http://pccowv.com/festival.htm)
- Sugarland Wine & Food Affair (Houston, TX; www.sugarlandwineandfoodaffair.com)
- Taste of Atlanta (Atlanta, GA; www.tasteofatlanta.com)
One of the grandest food festivals is three-day The Food & Wine Classic (www.foodandwine.com/classic), held in Aspen, Colorado, which celebrated its 36th year in 2017. 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 16th year, the 2017 festival was held February 22-26. Over 30,000 people attended the main events and another 20,000 attended separate, lower cost family-oriented festival events. Hosted by Florida International University (FIU), the Festival benefits FIU’s Chaplin School of Hospitality & Tourism Management.

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.

70.3 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
71

FOOD SAFETY

71.1 Overview

The Centers for Disease Control and Prevention (CDC, www.cdc.gov) estimates that each year 48 million people get sick, 128,000 are hospitalized, and 3,000 die of food-borne diseases.

“Each year, 1 in 6 Americans get sick from eating contaminated food.”

CDC, 8/1/17

The extent of food-borne illnesses associated with restaurant dining is difficult to ascertain because it is often have to identify the exact cause when symptoms occur. A 2016 survey by the CDC found that only 8% of people report food-borne sickness to local health departments.

“About 50% of all food-borne illnesses can be traced to restaurants.”

Nation’s Restaurant News, 5/8/17

Restaurant food safety depends, in large part, on safe ingredients from its suppliers.

According to the National Restaurant Association (www.restaurant.org), the industry has trained more than 5.6 million food service workers in safe handling and serving of food.
71.2 Consumer Response To Food Safety

The 2016 Restaurant Outlook, by AlixPartners (www.alixpartners.com), found that 34% of adults would not eat at a chain affected by an illness outbreak until the restaurant was cleared by health authorities; 28% of said they would never again eat at the chain.

Consumers are roughly evenly split on the relative food safety of supermarket food and restaurant meals. Food Service Safety Monitor, by The NPD Group (www.npd.com), reports that the percentage of adults that feel that food served at restaurants is safer than that purchased at groceries has remained, on average, between 47% and 49% since 2006; 51% to 53% of consumers view grocery food as safer.

71.3 Dining Grades

Dining Grades (www.dininggrades.com), developed by Dr. Harlan Stueven, a toxicologist, provides consumers with information that can help guide the choice of restaurants that place a high priority on food safety. The online site converts public data from health inspection records into a letter grade that users can find on a searchable map. Diners can also rate a restaurant or report it for suspected food illnesses.

71.4 Market Resources

Food Safety, Centers for Disease Control and Prevention. (www.cdc.gov/foodsafety/)


Food Safety and Inspection Service, U.S. Food and Drug Administration (www.fsis.usda.gov)

Food Safety Magazine (www.foodsafetymagazine.com)
72

HEALTHY DINING

72.1 Healthful Dining

Restaurant operators continued to emphasize healthier fare throughout 2017, with more and more consumers 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

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*, 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.

### 72.2 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 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.

### 72.3 What Foods Are Healthy?

In a 2016 survey, *The New York Times* asked members of the American Society For Nutrition (www.nutrition.org) and the general public about the healthfulness of various foods. The following are the percentages of nutritionists and members of the public that feel various foods are healthy:
<table>
<thead>
<tr>
<th>Food</th>
<th>Nutritionists</th>
<th>Public</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>American cheese</td>
<td>24%</td>
<td>39%</td>
<td>15%</td>
</tr>
<tr>
<td>Apples</td>
<td>99%</td>
<td>96%</td>
<td>3%</td>
</tr>
<tr>
<td>Baked potatoes</td>
<td>72%</td>
<td>71%</td>
<td>1%</td>
</tr>
<tr>
<td>Beef jerky</td>
<td>23%</td>
<td>27%</td>
<td>4%</td>
</tr>
<tr>
<td>Cheddar cheese</td>
<td>57%</td>
<td>56%</td>
<td>1%</td>
</tr>
<tr>
<td>Chicken</td>
<td>91%</td>
<td>91%</td>
<td>0%</td>
</tr>
<tr>
<td>Chocolate chip cookies</td>
<td>6%</td>
<td>10%</td>
<td>4%</td>
</tr>
<tr>
<td>Coconut oil</td>
<td>37%</td>
<td>72%</td>
<td>35%</td>
</tr>
<tr>
<td>Diet soda</td>
<td>18%</td>
<td>16%</td>
<td>2%</td>
</tr>
<tr>
<td>Frozen yogurt</td>
<td>32%</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>Granola</td>
<td>47%</td>
<td>80%</td>
<td>33%</td>
</tr>
<tr>
<td>Granola bar</td>
<td>28%</td>
<td>71%</td>
<td>43%</td>
</tr>
<tr>
<td>Hamburgers</td>
<td>28%</td>
<td>29%</td>
<td>1%</td>
</tr>
<tr>
<td>Hummus</td>
<td>90%</td>
<td>66%</td>
<td>24%</td>
</tr>
<tr>
<td>Oatmeal</td>
<td>97%</td>
<td>92%</td>
<td>5%</td>
</tr>
<tr>
<td>Orange juice</td>
<td>62%</td>
<td>78%</td>
<td>16%</td>
</tr>
<tr>
<td>Oranges</td>
<td>99%</td>
<td>96%</td>
<td>3%</td>
</tr>
<tr>
<td>Peanut butter</td>
<td>81%</td>
<td>79%</td>
<td>2%</td>
</tr>
<tr>
<td>Popcorn</td>
<td>61%</td>
<td>52%</td>
<td>9%</td>
</tr>
<tr>
<td>Pork chops</td>
<td>59%</td>
<td>52%</td>
<td>7%</td>
</tr>
<tr>
<td>Quinoa</td>
<td>89%</td>
<td>58%</td>
<td>31%</td>
</tr>
<tr>
<td>Shrimp</td>
<td>85%</td>
<td>69%</td>
<td>16%</td>
</tr>
<tr>
<td>SlimFast shake</td>
<td>21%</td>
<td>47%</td>
<td>26%</td>
</tr>
<tr>
<td>Steak</td>
<td>60%</td>
<td>63%</td>
<td>3%</td>
</tr>
<tr>
<td>Sushi</td>
<td>75%</td>
<td>49%</td>
<td>26%</td>
</tr>
<tr>
<td>Tofu</td>
<td>85%</td>
<td>57%</td>
<td>28%</td>
</tr>
<tr>
<td>Turkey</td>
<td>91%</td>
<td>90%</td>
<td>1%</td>
</tr>
<tr>
<td>White bread</td>
<td>15%</td>
<td>18%</td>
<td>3%</td>
</tr>
<tr>
<td>Whole milk</td>
<td>63%</td>
<td>59%</td>
<td>4%</td>
</tr>
<tr>
<td>Wine</td>
<td>70%</td>
<td>52%</td>
<td>18%</td>
</tr>
</tbody>
</table>

“Which foods are healthy? In principle, it’s a simple enough question, and a person who wishes to eat more healthily should reasonably expect to know which foods to choose at the supermarket and which to avoid. Unfortunately, the answer is anything but simple.”

_The New York Times, 7/5/16_
72.4 Priorities in Health-Conscious Eating

A 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 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%

72.5 Food Additives

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%

Attitudes Toward Additives, 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.
“More and more chains are positioning their ingredients as ‘real,’ ‘clean,’ or ‘free-from.’ “

Nation’s Restaurant News, 5/8/17

72.6 Genetically Modified Foods
The NPD Group found that 66% of adults were aware of genetically modified foods in 2016, an increase from 50% in 2013. Fifty-seven percent (57%) of adults say that they are concerned about GMOs.

In a December 2016 survey by Pew Research Center (www.pewresearch.org), 39% of adults said they consider genetically modified foods worse for a person’s health than other foods.

72.7 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.

72.8 Reduced Sodium
There are indications that one of the next big dietary issues will be 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.

### 72.9 Dieting

An assessment by The NPD Group found a long-term decline in dieting among American adults. Nineteen percent (19%) of adults report dieting in 2016, a drop from 31% who did so in 1991. By age, those who have dieted within the past year were as follows:

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

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, calorie tracking is the most popular focus of health-related smartphone apps. About 55% of consumers using these phone apps track caloric intake.
“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

72.10 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.
73

HOLIDAY DINING

73.1 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.

73.2 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.

73.3 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.

### 73.4 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:
• Special menu items: 63%
• Prix fixe menu: 45%
• Celebratory beverages or desserts: 34%
• Flower/candy: 28%
• Entertainment/music: 13%

73.5 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.

73.6 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.

73.7 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.

73.8 Thanksgiving
According to The NPD Group (www.npd.com), 51% of adults celebrate Thanksgiving somewhere other than their own home. Among those who eat at home,
about half prepare turkey.

National Restaurant Association research finds that 53% of U.S. households use restaurant-prepared takeout items for all or part of their holiday menu.

Many restaurants are open on Thanksgiving, and approximately 11% of Americans typically have their Thanksgiving Day meal at a restaurant. Those living in smaller households and households without children are more likely to dine out on Thanksgiving. Males are more likely than females to eat at a restaurant on the holiday. Generally, younger adults are more likely to use restaurant takeout items as part of their Thanksgiving meal at home.

“Our research shows that one in 10 consumers plan to dine out for a Thanksgiving meal and one in 20 will get a full takeout meal to celebrate the holiday. Consumers will also dine out while shopping on Black Friday.”

National Restaurant Association, 11/18/16

73.9 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.

73.10 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.

### 73.11 Super Bowl Sunday

If Super Bowl Sunday – a quasi-holiday in America – was ranked among traditional holidays as an occasion for restaurant patronage, it would rank seventh. For many bars and restaurants, it is the biggest sales day of the year.

According to the National Restaurant Association, approximately 15% of Americans order takeout or delivery from a restaurant for an at-home Super Bowl gathering. For younger adults (ages 18-to-34) the figure increases to 22%. Of those who order takeout or delivery, approximately 58% order pizza, 50% order chicken wings, and 20% order subs or sandwiches.
74

LICENSING

74.1 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%.

74.2 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. 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’s businesses include restaurants, media, and licensed products. Annual sales for Wolfgang Puck retail products are around $150 million, according to Nation’s Restaurant News.
75.1 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, respectively. 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</th>
<th>Organic/Environmentally Friendly</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FSR</td>
<td>QSR</td>
</tr>
<tr>
<td>Female</td>
<td>69%</td>
<td>65%</td>
</tr>
<tr>
<td>Male</td>
<td>59%</td>
<td>60%</td>
</tr>
<tr>
<td>FSR</td>
<td>47%</td>
<td>50%</td>
</tr>
<tr>
<td>QSR</td>
<td>38%</td>
<td>40%</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.acfchefs.org) asked chefs to rank the importance of 214 menu trends. Locally sourced meats and seafood ranked first in the survey; locally sourced produce ranked second.

The following percentages of restaurants offer locally sourced foods, according to the National Restaurant Association:

<table>
<thead>
<tr>
<th>Produce</th>
<th>Meat or Seafood</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fine-dining: 63%</td>
<td>87%</td>
</tr>
<tr>
<td>Casual-dining: 63%</td>
<td>55%</td>
</tr>
<tr>
<td>Family-dining: 63%</td>
<td>59%</td>
</tr>
</tbody>
</table>
The Generational Consumer Trend Report, 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%

In a December 2016 survey by Pew Research Group (www.pewresearch.org), 55% of adults said that they feel organic produce is better for health than conventionally grown produce. Forty-percent (40%) of adults say that most (6%) or some (34%) of the foods they eat are organic. Among these people, 75% think that organic foods are healthier than conventionally grown foods.

“There has been a pronounced shift in Americans’ eating habits over the past 20 years with far-reaching implications for how food is created, prepared and consumed. Moreover, the way Americans eat has become a source of potential social, economic and political friction as people follow personal preferences reflecting their beliefs about how foods connect with their health and ailments.”

Pew Research Center, 12/1/16

75.2 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 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% shop at national supermarkets. Overwhelmingly, respondents say their main source for local food is local farmers market and farm stores.

The importance of local food received increased awareness when former first lady, Michelle Obama, emphasized the need for fresh, unprocessed, locally grown food by planting a vegetable garden on the White House grounds.

75.3 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.

### 75.4 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.innatlballdwin creek.com)
- Gathering Together Farm (Philomoth, OR; www.gatheringtogetherfarm.com)
- Paradise Farms (Homestead, FL; www.paradisefarms.net)
- Patowmock 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 farm-to-table dinners, where 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.
75.5 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

The following are restaurant chains that focus wholly or primarily on organic menus:

• Chipotle (www.chipotle.com)
• Dig Inn (www.diginn.com)
• Elevation Burger (www.elevationburger.com)
• Evos (www.evos.com)
• LYFE Kitchen (www.lyfeキッチン.com)
• Native Foods (www.nativefoods.com)
• Organic Coup (www.organiccoup.com)
• Panera (www.panera.com)
• Pizza Fusion (www.pizzafusion.com)
• Sweet Green (www.sweetgreen.com)
• Tender Greens (www.tendergreens.com)
• Veggie Grill (www.veggiegrill.com)
76.

LOYALTY PROGRAMS

76.1 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.

“Good loyalty programs can help brands identify the 20% of customers that drive 65% of business.”

Nation’s Restaurant News, 4/18/17

76.2 Restaurant Programs
A survey by the National Restaurant Association (www.restaurant.org) found that roughly one out of four full-service and quick-service restaurants offer frequent-diner programs.

Based on survey responses, the following percentages of restaurants reported their programs were more popular than the previous year:
• Fast-casual: 61%
• Family-dining: 59%
• Fine-dining: 53%
• Quick-service: 53%
• Casual-dining: 46%

A survey of restaurant owners and managers by LivingSocial (www.livingsocial.com) found that one-third offered a loyalty program. Among that group, more than 60% 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.
76.3 Customer Participation

According to the 2017 Value & Pricing Consumer Trend Report, by Technomic (www.technomic.com), 25% of adults participate in a restaurant-based loyalty or rewards program.

Colloquy (www.colloquy.com) reported restaurant loyalty programs have a combined 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, according to the National Restaurant Association. Among this group, the types of restaurants participation are as follows:

- 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 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.

76.4 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
- Number 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
• Number 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
• Number 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
• Number 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
• Number of Members: 2.7 million

Stabucks 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
• Number of Members: more than 12 million
77

MEAL KITS

77.1 The Meal-Kit Customer

A meal kit, or meal delivery kit, is a package containing food ingredients and recipes for consumers to prepare their own fresh meals. Sold as a subscription service, orders are placed digitally and delivered directly to the customer.

As of December 2016, 30% of adults had ordered a meal kit digitally, according to a survey by Acosta Sales & Marketing (www.acosta.com). Those that have done so by age are as follows:

- Millennials (ages 18-to-35): 60%
- Generation Xers (ages 36-to-51): 31%
- Baby Boomers (ages 52-to-70): 10%
- Seniors (ages 71 and older): 4%

“Some 60% of respondents ages 18-to-35 have tried a meal delivery kit, according to Acosta. This makes sense. Like many other digital services, meal delivery kits were adopted first by Millennials. And, as this group approaches their peak earning years and starts families, their desire for convenience and customization grows.”

eMarketer, 12/22/16

In a survey by The NPD Group of adults who had tried meal-kit services, over 80% were satisfied with the ingredients, freshness, and instructions they received with the box. Still, 56% discontinued purchasing meal kits, citing cost as the primary reason. Meals typically cost about $10. Convenience is a sticking point with many users. Even with preportioned ingredients, meal-kit meals can be labor intensive; some recipes require more than an hour to prepare.
77.2 Market Assessment
Packaged Facts (www.packagedfacts.com) assessed the meal kit market in 2016 at $1.5 billion. The global market is estimated at $2.2 billion.

77.3 Key Players
According to Inc., there were over 150 meal kit companies in the United States as of March 2017.

Blue Apron, HelloFresh, and Plated were the first three companies in the meal kit market and remain the market leaders. Blue Apron, which went public in June 2017, is the dominant company in the market, with sales three times that of its nearest competitor, according to 1010data (www.1010data.com).

Numerous startups have entered the meal kit market including Home Chef, Just Add Cooking, PeachDish, Purple Carrot, and Sun Basket.

In 2016, several major food brands including Campbell Soup Company, Hershey, and PepsiCo’s Quaker, and Tyson Foods introduced meal kit products.

Two publications of Time Inc., Cooking Light and Real Simple, offer meal kits through the FreshRealm service. FreshDirect, a grocery delivery company, also sells meal kits.

In May 2017, Amazon introduced a product line of boxes of premeasured ingredients and easy-to-follow instructions to a select group of customers. With its June 2017 acquisition of Whole Foods, Amazon could emerge as a dominant player in the meal kit market.
**RESTRICTIVE DIET MENUS**

### 78.1 Overview
Mintel ([www.mintel.com](http://www.mintel.com)) estimates that 100 million Americans have a food intolerance of some type.

### 78.2 Gluten-Free Menu Items
The National Restaurant Association ([www.restaurant.org](http://www.restaurant.org)) surveys member chefs of the American Culinary Federation ([www.acfchefs.org](http://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](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.
“The gluten-free movement has traversed a variety of stages: In the beginning, it seemed like a trend – or worse – a fad. In recent years this trend has proven it’s here to stay, and gluten-free retail products and menu items have gotten better by leaps and bounds. Smart chefs recognize that gluten-free options deserve their attention.”

Restaurant Hospitality, 1/17

When introducing gluten-free menu items, restaurants must take measures to ensure that ingredients in dishes are not contaminated with gluten protein from other items being prepared in the same kitchen.

“...It’s not so hard offering gluten-free, but the contamination issue is the thing to watch for. You can serve hamburger with no bun, but if you’re using the same utensil to put a hamburger on a regular bun there’s [gluten] contamination. If you’re making a gluten-free pizza you have to make it in a different place, using different pans. You can’t just pick off croutons from a salad. It’s more than just saying we have a gluten-free menu.”

Deborah Ceizler, Director
Celiac Disease Foundation
78.3 Kosher Cuisine

More than 10 million people eat kosher products annually. According to Michael Cohen, a consultant and former owner of a kosher pizza business, approximately 50% of people who eat kosher do so because of their Jewish faith, 30% do so for health reasons, and the other 20% are non-Jewish and eat kosher for other reasons.

Certification agencies called mashgiachs supervise food production and preparation to ensure that food is kosher. According to Kashrus Magazine, which tracks kosher certification, there are approximately 1,100 kosher certification organizations in the U.S.

Lubicom (www.lubicom.com) estimates the U.S. retail market for kosher foods at $13 billion.

According to a recent survey by Mintel (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).

Delis remain the most popular format for Jewish cuisine. Foursquare (www.foursquare.com) rated the following as the top Jewish delis in 2016:

- 2nd Ave Deli (New York, NY)
- Ben’s Best Kosher Delicatessen (Rego Park, NY)
- Brent’s Deli (Northridge, CA)
- Canter’s Delicatessen (Los Angeles, CA)
- David’s Brisket House (Brooklyn, NY)
- Famous 4th Street Delicatessen (Philadelphia, PA)
- Harold’s New York Deli (Edison, NJ)
- Jake’s Deli (Milwaukee, WI)
- Katz’s Delicatessen (New York, NY)
- Kenny & Ziggy’s Deli (Houston, TX)
- Kenny & Zuke’s Delicatessen (Portland, OR)
- Langer’s Delicatessen-Restaurant (Los Angeles, CA)
- Manny’s Cafeteria & Delicatessen (Chicago, IL)
- Mile End Delicatessen (Brooklyn, NY)
- Nate ‘n Al Delicatessen (Beverly Hills, CA)
- Parkway Deli & Restaurant (Silver Spring, MD)
- Roasters’ N Toasters (Miami, FL)
- Saul’s Restaurant & Deli (Berkeley, CA)
- Shapiro’s Delicatessen (Indianapolis, IN)
• The Bagel Deli (Denver, CO)
• The General Muir (Atlanta, GA)
• Weiss Deli and Bakery (Henderson, NV)
• Wexler’s Deli (Los Angeles, CA)
• Wise Sons Jewish Delicatessen (San Francisco, CA)
• Zaftigs Delicatessen (Brookline, MA)
• Zingerman’s Delicatessen (Ann Arbor, MI)

78.4 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.

According to Zabihah (www.zabihah.com), an online halal restaurant guide, the number of halal restaurants and grocery stores increased from 200 in 1998 to 7,600 in 2017.

Nielsen (www.nielsen.com) assessed sales of halal foods in groceries and convenience stores in 2016 at $1.9 billion, a 15% increase from 2012.

78.5 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 (www.gallup.com) 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.

The Daily Meal (www.thedailymeal.com) recognized the following as the Top Vegan Restaurants in the United States in 2017:

- By Chloe (New York, NY)
- Crossroads Kitchen (Los Angeles, CA)
- G-Zen (Bradford, CT)
- Ground Control (Chicago, LA)
- Little Pine (Los Angeles, CA)
- Natural Selection (Portland, OR)
- Plant (Asheville, NC)
- Plant Food + Wine (Miami, FL, and Venice, CA)
- V Street (Philadelphia, PA)
- Vedge (Philadelphia, PA)
79

SUSTAINABILITY

79.1 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.

According to the 2017 Value & Pricing Consumer Trend Report, by Technomic (www.technomic.com), 57% of adults say the use of sustainable foods is very important in creating a good value at restaurants, up from 52% in 2015. In a survey by Technomic, 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.”

Nation’s Restaurant News

79.2 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.
79.3 Top Sustainable Restaurants

Spoon University (www.spoonuniversity.com), a blog, recognized the following as the most sustainable restaurants in the U.S. in 2016:

- Bareburger (20 locations in the Mid-Atlantic region)
- Busboys and Poets (Washington, DC)
- Founding Farmers (four locations in the Washington DC area)
- Mixt Greens (Los Angeles and San Francisco, CA)
- Red Stag Supperclub (Minneapolis, MN)
- Root Down (Denver, CO)
- Soupergirl (Washington, DC)
- The Plant Cafe Organic (Seven locations in the San Francisco Bay area)
- Tilth (Seattle, WA)
- Woodberry Kitchen (Baltimore, MD)
80.1 Market Assessment

According to The NPD Group (www.npd.com), the average U.S. consumer purchases 127 meals annually at restaurants for consumption elsewhere. For comparison, the average customer buys 81 meals for consumption in a restaurant. Restaurant takeout and delivery sales are approximately 70% of quick-service restaurant sales and 10% of sales at full-service restaurants.

The NPD Group assessed that delivery represents 1.7 billion annual restaurant purchases and $13.6 billion in sales. In-store pick-up as well as delivery and digital orders via a website, app, or text accounted for 2 billion restaurant purchases in 2016.

TechCrunch (www.techcrunch.com) estimated that the food takeout and delivery market represents about $70 billion in sales, with 13% coming from digital sales.

80.2 Takeout and The American Lifestyle

In a 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>All Adults</th>
<th>Frequent Customers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FSR</td>
</tr>
<tr>
<td>Delivery from a full-service restaurant:</td>
<td>55%</td>
</tr>
<tr>
<td>Delivery from a quick-service restaurant:</td>
<td>52%</td>
</tr>
<tr>
<td>Takeout from a full-service restaurant:</td>
<td>51%</td>
</tr>
</tbody>
</table>

80.3 Trends In Takeout And Off-Premise Dining

According to the 2016 Takeout & Off-Premise Dining Consumer Trend Report, by Technomic, consumers average 5.5 to-go (takeout or delivery) orders per month. In 2016, carryout orders outnumbered delivery three-to-one. Nineteen percent
(19%) of adults say they are increasingly replacing carryout with delivery; among those ages 18-to-34, 35% are doing so.

Eighty-six percent (86%) of consumers order to-go food at least once a month. By age and daypart, those that order carryout or delivery at least once a month are as follows:

<table>
<thead>
<tr>
<th></th>
<th>18-to-34</th>
<th>35 and Older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakfast/brunch:</td>
<td>69%</td>
<td>51%</td>
</tr>
<tr>
<td>Morning snack:</td>
<td>53%</td>
<td>26%</td>
</tr>
<tr>
<td>Lunch:</td>
<td>84%</td>
<td>72%</td>
</tr>
<tr>
<td>Mid-afternoon snack</td>
<td>56%</td>
<td>29%</td>
</tr>
<tr>
<td>Dinner:</td>
<td>88%</td>
<td>78%</td>
</tr>
<tr>
<td>Late-night meal/snack</td>
<td>57%</td>
<td>26%</td>
</tr>
</tbody>
</table>

When asked the reasons for ordering takeout and delivery, responses were as follows:

<table>
<thead>
<tr>
<th></th>
<th>18-to-34</th>
<th>35 and Older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t feel like eating in a restaurant:</td>
<td>47%</td>
<td>57%</td>
</tr>
<tr>
<td>Don’t have time to sit and eat at a restaurant:</td>
<td>43%</td>
<td>33%</td>
</tr>
<tr>
<td>Ordering food for others as well as self:</td>
<td>36%</td>
<td>33%</td>
</tr>
<tr>
<td>Am by myself and don’t want to sit alone:</td>
<td>37%</td>
<td>28%</td>
</tr>
<tr>
<td>Less expensive than dining in a restaurant:</td>
<td>28%</td>
<td>24%</td>
</tr>
<tr>
<td>More casual than dining in a restaurant:</td>
<td>23%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Thirty-three percent (33%) of adults say that they are now ordering to-go meals more frequently than in the past, 42% are ordering the same, and 25% are ordering less often. Among those ages 18-to-34, 49% are ordering to-go more often.

When asked the reasons for increased ordering of to-go meals, responses were as follows:

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>More places nearby offer food to-go:</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>It is now more a part of my routine:</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>More options available to-go now:</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>Have less time to cook at home:</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>My spending has increased in general:</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>More of my favorite places offer food to-go:</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>It is easier to order with new apps and to-go amenities:</td>
<td>22%</td>
<td></td>
</tr>
</tbody>
</table>

Adults are likely to use the following conveniences for takeout and delivery when offered at limited-service restaurants (LSR) and full-service restaurants (FSR):

<table>
<thead>
<tr>
<th></th>
<th>LSR</th>
<th>FSR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call-ahead ordering:</td>
<td>54%</td>
<td>53%</td>
</tr>
<tr>
<td>Online ordering via computer:</td>
<td>48%</td>
<td>45%</td>
</tr>
<tr>
<td>Prepay:</td>
<td>41%</td>
<td>41%</td>
</tr>
<tr>
<td>Online ordering via mobile device:</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Counter for carryout/pickup orders:</td>
<td>n/a</td>
<td>54%</td>
</tr>
</tbody>
</table>
- Separate order stations for to-go orders: 42%  n/a
- Order/prepay at an inside kiosk: 28%  n/a

Adults consume their carryout and delivery meals at the following places:

**Carryout**
- At home: 71%
- In transit: 42%
- At office: 30%

**Delivery**
- At home: 82%
- At work: 25%
- In public place: 13%

Takeout sales do not appear to significantly compromise dining room traffic. Technomic found that 60% of consumers who recently purchased takeout said if they had not done so on that occasion, they would most likely have made food at home and not purchased from a foodservice operator.

### 80.4 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.

### 80.5 Pizza Delivery

In 2016, 1010data (www.1010data.com) estimated that the three largest pizza chains garnered 41.1% of the entire U.S. delivery market. Marketshare was as follows:
- Domino’s: 15.4%
- Pizza Hut: 14.4%
- Papa Johns: 11.3%
- Other pizza chains: 4.0%
- Non-pizza restaurants: 54.9%
Pizza takeout and delivery are assessed in Sections 45.3 and 83.4 of this handbook.

### 80.6 To-Go Packaging
As restaurant delivery sales are on the rise, packaging is increasing in importance. Approximately 40% of consumers use takeout packaging to serve, store and reheat food.

> “Restaurant industry leaders say the packaging has to reflect the brand, serving as an extension of the restaurant. The packaging also has to maintain the quality of the food, making transport safe and easy, and provide a solution that makes recycling easier for the end user.”

*Nation’s Restaurant News, 5/9/17*

Technomic Consumer Brand Metrics (July 2017) reported that consumers find the following chains offer the best to-go packaging (percentage of respondents):
- Papa Murphy’s: 70%
- Jimmy John’s: 68%
- Raising Cane’s: 66%

> “Emphasizing packaging in to-go strategies can deliver on consumers’ expectation that food from the drive-thru be just as fresh as food eaten in the restaurant.”

*Restaurant Business, 7/17*

### 80.7 App-Based Meal Delivery Services
App-based meal delivery services are assessed in Chapter 84 of this handbook.
PART X: DINING & THE INTERNET
USE OF THE INTERNET & MOBILE FOR DINING

81.1 Restaurant Technology

According to the National Restaurant Association (www.restaurant.org), 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</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>via own branded website/app:</td>
<td>35%</td>
<td>41%</td>
<td>24%</td>
<td>38%</td>
</tr>
<tr>
<td>Takeout/delivery ordering</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>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>

An October 2016 survey by Toast (http://pos.toasttab.com) asked participants the importance of various technology features when visiting restaurants. Responses were as follows (percentage of respondents):

<table>
<thead>
<tr>
<th>Feature</th>
<th>Very Important</th>
<th>Somewhat Important</th>
<th>Not Very Important</th>
<th>Not At All Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online reservations:</td>
<td>36%</td>
<td>41%</td>
<td>15%</td>
<td>8%</td>
</tr>
<tr>
<td>Free wi-fi:</td>
<td>23%</td>
<td>33%</td>
<td>27%</td>
<td>17%</td>
</tr>
<tr>
<td>Online/mobile ordering:</td>
<td>19%</td>
<td>37%</td>
<td>29%</td>
<td>15%</td>
</tr>
<tr>
<td>Mobile payments:</td>
<td>14%</td>
<td>30%</td>
<td>34%</td>
<td>22%</td>
</tr>
<tr>
<td>Loyalty/rewards programs:</td>
<td>11%</td>
<td>39%</td>
<td>34%</td>
<td>16%</td>
</tr>
<tr>
<td>Touchscreen ordering kiosks:</td>
<td>9%</td>
<td>28%</td>
<td>36%</td>
<td>27%</td>
</tr>
</tbody>
</table>

81.2 Dining Activities Via Mobile Devices

A 2016 survey by ATYM Market Research (www.atym.com) asked adult Internet users if they had mobile apps for restaurants or food-ordering services installed on their mobile device. Responses were as follows:
- Yes, multiple apps: 12.7%
- Yes, one app: 10.7%
- No: 62.8%
- Don’t have a smartphone: 13.8%

The following percentages of adults use smartphones or tablets for various dining-related activities at least once a month (source: National Restaurant Association):

<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 like Seamless or GrubHub:</td>
<td>9%</td>
<td>13%</td>
<td>6%</td>
<td>9%</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

81.3 Restaurant Mobile Apps

Based on number of downloads, App Annie (www.appannie.com) ranked restaurant apps in August 2017 as follows:
1. McDonald’s
2. Starbucks
3. Chick-fil-A
4. Domino’s Pizza
5. Dunkin’ Donuts
6. Panera Bread
7. Pizza Hut
8. Burger King
9. Subway
10. Papa John’s Pizza
11. Texas Roadhouse
12. Buffalo Wild Wings
13. El Pollo Loco
14. Chipotle Mexican Grill
15. Taco Bell
16. Sonic Drive-In
17. Jimmy John’s Sandwiches
18. Whataburger
19. Wendy’s
20. Baskin-Robbins
21. Smoothie King
81.4 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. Fifty-seven percent (57%) of consumers say they will avoid a business that has negative reviews and ratings.

The two top national sites for restaurant reviews are OpenTable (www.opentable.com) and Yelp (www.yelp.com). Each have about four million written reviews and 15 million visitors a month. Other popular restaurant review destinations include Eat24 (www.eat24.com), Gayot (www.gayot.com), MenuPages (www.manupages.com), Zagat (www.zagat.com), and Zomato (formerly Urbanspoon; www.zomato.com).

A study by Harvard Business School (www.hbs.edu) reported that a one-star Yelp rating increase can lead to a 5% to 9% boost in revenue for a restaurant. A half-star improvement on Yelp’s 5-star rating makes it 30% to 49% more likely that a restaurant will sell out seats during peak hours.

Sixty-eight percent (68%) of U.S. restaurant owners actively monitor and manage reviews on multiple review sites.

81.5 Mobile Payment

According to the National Restaurant Association, the following percentages of restaurant operators offer 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%

OpenTable, 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 46% of those who have not used the technology like the concept suggests increasing use in the future.

“Customers like their smartphones, so enabling them to pay for their food seems like a no-brainer. Or is it? Many say it’s inherently limited, at least for now, because it’s just not that hard to pay with a credit card.”

*Nation’s Restaurant News, 2/6/17*

### 81.6 Preferred Communications

A 2016 survey by Deloitte (www.deloitte.com) asked adult Internet users the preferred types of communications or information that they preferred to receive from restaurants. Responses were as follows:

- Discounts and special offers: 80%
- Menu-related news: 36%
- Personalized messages: 34%
- General content: 21%
- Forum to provide feedback: 12%

“Regular diners overwhelmingly want to receive information on discounts and special offers from restaurants. Among Internet users who visit casual, fast-casual or quick-service restaurants at least twice each week, eight in 10 of them agreed about what they wanted to hear about: deals.”

*eMarketer, 9/23/16*
82

ONLINE RESERVATIONS

82.1 Online Reservations
There are several online reservations services operating throughout the United States.

Restaurants that use the services are relieved of much of the burden of developing reservation technology and managing the reservation process. Diners find the services to be convenient. Restaurants bear the cost of the services; diners who make reservations through the services do not pay a fee.

This chapter profiles the five largest restaurant reservation services: OpenTable, Reserve, Resy, Tock, and Yelp Reservations.

“Online reservations has become a utility, like gas or water or electric.”

Restaurant Hospitality, 7/17

82.2 Profiles Of Key Players

OpenTable (www.opentable.com)

• OpenTable provides reservation services for more than 42,000 restaurants, seating more than 22 million diners per month. Since its inception, OpenTable has seated over 1 billion diners.
• Guests can use the OpenTable app and website to check wait times and put their names on a waiting list.
• While OpenTable has long focused on filling seats, now the tech company is building on tools that allow restaurants to run more efficiently. For example, the Guest Center gives restaurants table management tools and allows them to keep notes about guest preferences that can be accessed across multiple locations and through any mobile device.
• The Guest Center allows guests to communicate with restaurants by text, rather than email. Planned are features like the ability to offer special prix fixe meals and...
the use of loyalty points to access hard-to-get reservations at the hottest restaurants.

- Restaurants using OpenTable’s reservation service pay an installation fee of $1,295 and a monthly fee of $249, with an optional fee of $99/month to be featured in the OpenTable Dining Guide. There is also a fee of $1.00 per cover booked on OpenTable.com or 25¢ per cover booked via the restaurant’s website.
- OpenTable was acquired in 2014 by The Priceline Group.

“Since it first launched in 1998, OpenTable has been the leader in online reservations.”

Restaurant Hospitality, 7/17

Reserve (www.reserve.com)
- Reserve provides a seamless system for keeping notes on diners to help restaurants build guest loyalty.
- Restaurants can put a cancellation policy in place.
- The cost to restaurants is $99 per month. There are no cover fees and no long-term contracts.

Resy (www.resy.com)
- Launched in 2014, Resy builds operations software for the restaurants, allowing them to book diners through their own websites.
- As of August 2017, Resy was working with over 500 restaurants in 40 markets across the U.S.
- Resy allows restaurants to match their inventory in different ways to allocate tables by seating zone or prominence. Resy also enables restaurants to share receipt data with other businesses to track trends.
- The Resy widget is platform agnostic, so restaurants can allow guests to book through Facebook, for example.
- The Resy app helps diners find restaurants to book a table and allows payment via the app. Among features for diners is two-way texting for reservations and wait list. This reduces the no-show rate to less than 5%.
- The cost to restaurants ranges from $89 per month to $899 per month depending on features.
In 2017, Resy completed a $13 million round of financing led by Airbnb Inc., which is integrating the reservation service into its platform. The Airbnb/Resy partnership is currently in beta test in San Francisco.

**Tock (www.tockhq.com)**
- Tock is primarily a site for restaurants that use a ticket system for pre-set menus and events that are pre-paid, or that ask for a deposit. Regular, free reservation booking is also available.
- Tock provides services primarily for fine dining restaurants and had more than 200 restaurants within its network as of August 2017.
- Device agnostic, Tock offers table management, guest profiles, and financial reporting.
- Diners can share details about upcoming restaurant events across Facebook, Twitter, and email.
- In addition to managing reservations, Tock offers experiences like chefs' tastings, kitchen tables, events, and private dining.
- Largely as a result of the pre-payment feature, Tock's no-show rate is below 1%.
- Costs to restaurants range from $99 per month plus 99¢ per cover to $695 per month with unlimited covers.

**Yelp Reservations (www.yelpreservations.com)**
- Launched as a review site, Yelp entered the online reservations market with the acquisition of reservation site SeatMe in 2013. The service expanded in 2016 with the acquisition of Nowait, a tool that allows guests to put their names on waiting lists at establishments where reservations are not taken. Users can go to Yelp to find a restaurant, read or leave a review, book a reservation, check out wait times and get on a waiting list, and order delivery.
- Yelp is the leading online platform diners use to find restaurants. There are about 100 million unique users, or 37% of the digital population, on mobile devices alone every month.
- As of August 2017, about 4,000 restaurants were using Yelp Reservations, including about 700 in the San Francisco area alone. In addition, Nowait has 5,000 restaurants in its network.
- For restaurants, Yelp offers guest services that allow them to keep track of diner preferences such as allergies and wine preferences.
- In 2016, 92 million diners were seated through Yelp Reservations.
- Yelp Reservations charges participating restaurants a $249 flat monthly fee with no additional charges per booking.
83.1 Overview
According to The NPD Group (www.npd.com), the use of mobile apps, text messages, and the Internet to order food from a restaurant or other foodservice outlets accounted for 3% of all restaurant traffic, or 1.9 billion foodservice visits in 2016, an 18% increase over the prior year.
Fifty percent (50%) of digital orders come at dinner time, and 35% of digital ordering include parties with kids. People under age 35 and those with higher household incomes are among above-average users of digital ordering. When consumers order digitally, they are twice as likely to order on a deal; 29% include coupon use.
People under age 35, African-American consumers, and those with high household income are above average users of digital ordering.
In 2016, the percentage of restaurant orders placed online or via smartphone or tablet app – now 6.6% of the total – exceeded those placed over the telephone (5.0%).

“At a time when in-person visits to restaurants are declining, electronic orders have been a boon to the industry. They’ve tripled over the past five years.”

Fortune, 6/15/17

83.2 Digital Ordering
According to the U.S. QSR Benchmark Study, by Market Force Information (www.marketforce.com), adult Internet users used the following technologies in 2016 to place an order at a quick-service or fast-casual restaurant (percentage of respondents):
• Smartphone app: 23%
• Tablet at table: 22%
• Kiosk in the restaurant: 16%
• None of the above: 56%

The 2016 Takeout & Off-Premise Dining Consumer Trend Report, by Technomic (www.technomic.com), reported that adults are likely to use ordering technologies when offered by restaurants (percentage of respondents):

<table>
<thead>
<tr>
<th>Technology</th>
<th>Limited-Service</th>
<th>Full-Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online ordering via computer</td>
<td>48%</td>
<td>45%</td>
</tr>
<tr>
<td>Online ordering via mobile device</td>
<td>40%</td>
<td>40%</td>
</tr>
</tbody>
</table>

KeyBanc Capital Markets (www.key.com/corporate/knowledge-center/capital-markets.jsp) reported the following percentages of consumers increased online and mobile ordering at non-pizza restaurants in 2016:
- Millennials: 39%
- Generation Xers: 37%
- Baby Boomers: 19%
- Seniors: 25%

### 83.3 Mobile Ordering

According to a 2016 survey by Toast (http://pos.toasttab.com), adult Internet users order food via smartphone or tablet as follows (percentage of respondents):
- Once a month: 34%
- Once a week: 25%
- About every day: 3%
- Never: 38%

“While currently more orders are placed using websites, orders placed with a mobile app are growing strongly. Digital ordering is now really all about the mobile app.”

Bonnie Riggs, Analyst
The NPD Group, 3/6/17
**83.4 Digital Orders For Pizza Chains**

Domino’s and Pizza Hut each receive more than 60% of orders via digital channels; for Pizza Hut digital orders make up about one-half of all orders. Orders coming from mobile devices account for more than 60% or digital orders for all three chains.

“Digital ordering has become the primary battleground for pizza chains. Domino’s has surged in recent years partly because of its effective marketing of digital features.”

*Nation’s Restaurant News, 5/29/17*

Domino’s has been the leader in digital ordering technology in recent years. Pizza Hut is spending $130 million to help increase its digital capabilities. Papa John’s is also investing in its digital order systems.

“We have an opportunity to get to the 80%-plus point [of orders via digital] over the next several years.”

Steve Ritchie, President
Papa John’s
*Nation’s Restaurant News, 5/29/17*
84

APP-BASED DELIVERY SERVICES

84.1 Overview
A host of startups are offering on-demand meal delivery that is ordered via smartphone apps. They have developed restaurant delivery services using a model similar to that developed by Uber and Lyft.

“It’s been about five years since the latest wave of third-party delivery disruptors burst onto the scene. Grubhub/Seamless. DoorDash. Postmates. UberEats. These tech-fueled companies are training consumers to embrace the notion of getting just about anything they want delivered to their door.”

Restaurant Hospitality, 2/17

According to the 2016 Takeout & Off-Premise Dining Consumer Trend Report, by Technomic (www.technomic.com), when ordering takeout, adults use third party delivery services as follows (percentage of respondents):
• Always: 2%
• Most of the time: 10%
• Sometimes: 15%
• Rarely: 16%
• Never: 57%

According to 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%

### 84.2 Preferred Delivery Services

According to the 2016 Takeout & Off-Premise Dining Consumer Trend Report, among adults using delivery for to-go from a restaurant, the following services are preferred (percentage of respondents):

<table>
<thead>
<tr>
<th>Service</th>
<th>Age 18-to-34</th>
<th>Age 35 and Older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant-specific site</td>
<td>42%</td>
<td>46%</td>
</tr>
<tr>
<td>GrubHub:</td>
<td>24%</td>
<td>9%</td>
</tr>
<tr>
<td>Yelp Eat24:</td>
<td>17%</td>
<td>6%</td>
</tr>
<tr>
<td>Delivery.com:</td>
<td>11%</td>
<td>4%</td>
</tr>
<tr>
<td>Uber Eats:</td>
<td>13%</td>
<td>3%</td>
</tr>
<tr>
<td>Amazon Delivery:</td>
<td>9%</td>
<td>2%</td>
</tr>
<tr>
<td>Seamless:</td>
<td>7%</td>
<td>1%</td>
</tr>
<tr>
<td>Postmates:</td>
<td>6%</td>
<td>1%</td>
</tr>
</tbody>
</table>

According to a 2016 survey by KeyBanc Capital Markets (www.key.com), preferred services for ordering restaurant delivery are as follows:

- Restaurant website/app: 75%
- GrubHub: 20%
- Amazon Prime Now: 9%
- Yelp Eat24: 7%
- Urban Eats: 7%
- Seamless: 5%
- DoorDash: 3%
- Postmates: 3%
- Thistle: 2%
- Caviar: 1%
- Sprig: 1%
- Other: 2%

### 84.3 Profiles Of Key Players

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

The following are key players in the restaurant meal delivery business:
Amazon Prime (https://amazon.com/restaurants)
- Amazon entered the restaurant ordering and delivery market in 2015 with its Echo products programmed to accommodate ordering via voice command.
- Amazon Prime members have been able to order free restaurant delivery in an hour or less since 2015 through the website and app. As of August 2017, the service was available in 20 cities across the U.S., including thousands of restaurants.
- With its June 2017 acquisition of Whole Foods, Amazon could expand as a dominant player in the food delivery market.

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.
- As of August 2017, Caviar provides service in Brooklyn, Boston, Chicago, Dallas, Manhattan, Los Angeles, Philadelphia, Queens, Sacramento, the San Francisco Bay Area (including the East Bay & Marin), 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.
- As of August 2017, DoorDash services were available for over 54,000 restaurants in over 300 cities.

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 2016, GrubHub sent nearly $2 billion in gross food sales to local takeout restaurants. The company has served approximately 8.1 million customers, and it processes an average of 250,000 daily orders.
- As of August 2017, GrubHub online and mobile ordering platforms allowed diners to order directly from more than 55,000 takeout restaurants in over 1,200 U.S. cities.

Order Up (www.orderup.com)
- Founded in 2009 in Baltimore, Order Up provided restaurant meal delivery services in 62 cities as of August 2017. The company focuses on medium-size metro areas
like Charlottesville, Virginia; Denver, Colorado; and Santa Barbara, California.

**Postmates** ([www.postmates.com](http://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 offers delivery services in more than 100 metropolitan areas.
- Postmates has delivery deals with Chipotle, McDonald’s, and Starbucks.

**UberEats** ([www.ubereats.com](http://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. In 2017, UberEats was active in all major U.S. cities.
- 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.
85

SOCIAL NETWORKING

85.1 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.

85.2 Restaurant Social Media Index
In 2016, the following restaurant brands had the highest RSMI:

- Taco Bell: 480.02
- Chick-fil-A: 475.96
- Starbucks: 474.63
- Shake Shack: 473.83
- Panera Bread: 472.40
- Wendy’s: 471.87
• Arby’s: 471.80
• Sonic Drive-In: 468.28
• Buffalo Wild Wings: 466.05
• Dunkin’ Donuts: 465.16
• Tender Greens: 462.76
• Red Robin Gourmet Burgers: 455.81
• McAlister’s Deli: 453.78
• Jersey Mike’s Subs: 453.55
• MOD Pizza: 453.08
• Sweetgreen: 449.17
• Noodles & Company: 447.01
• Zoës Kitchen: 445.20
• In-N-Out Burger: 444.32
• Jimmy John’s: 441.90
• Smashburger: 437.05
• Veggie Grill: 435.79
• Raising Cane’s: 435.56

85.3 Market Resources
DigitalCoCo, 330 SW 2nd Street, Suite 103, Ft. Lauderdale, FL 33301. (954) 416-3028. (www.digitalcoco.com)
86

BEVERAGE CONSUMPTION & SPENDING

86.1 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.

86.2 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.

86.3 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>
<thead>
<tr>
<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):
- 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>
</tbody>
</table>

|     | 5%    | 29%                    | 20%                   | 29%                    | 22%   |

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

<table>
<thead>
<tr>
<th>All</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beer:</td>
<td>63%</td>
<td>75%</td>
</tr>
<tr>
<td>Domestic wine:</td>
<td>54%</td>
<td>45%</td>
</tr>
<tr>
<td>Vodka:</td>
<td>41%</td>
<td>40%</td>
</tr>
<tr>
<td>Rum:</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>Imported wine:</td>
<td>28%</td>
<td>26%</td>
</tr>
<tr>
<td>Tequila:</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>Canadian/Irish/other whiskey:</td>
<td>20%</td>
<td>25%</td>
</tr>
<tr>
<td>Champagne:</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>Cordials and liqueurs:</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Bourbon:</td>
<td>15%</td>
<td>23%</td>
</tr>
<tr>
<td>Gin:</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Scotch:</td>
<td>11%</td>
<td>17%</td>
</tr>
<tr>
<td>Cognac:</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>Brandy:</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>Other:</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>
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>Avg. Consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male, ages 19-to-49:</td>
<td>34.1%</td>
</tr>
<tr>
<td></td>
<td>14.7 fl. oz.</td>
</tr>
<tr>
<td>Male, ages 50 and older:</td>
<td>31.5%</td>
</tr>
<tr>
<td></td>
<td>9.1 fl. oz.</td>
</tr>
<tr>
<td>Female, ages 19-to-49:</td>
<td>20.6%</td>
</tr>
<tr>
<td></td>
<td>4.5 fl. oz.</td>
</tr>
<tr>
<td>Female, ages 50 and older:</td>
<td>16.0%</td>
</tr>
<tr>
<td></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</td>
<td>New Hampshire:</td>
<td># 2</td>
</tr>
<tr>
<td>2</td>
<td>District of Columbia:</td>
<td>#14</td>
</tr>
<tr>
<td>3</td>
<td>Nevada:</td>
<td># 1</td>
</tr>
<tr>
<td>4</td>
<td>Delaware:</td>
<td>#17</td>
</tr>
<tr>
<td>5</td>
<td>Wyoming:</td>
<td># 3</td>
</tr>
<tr>
<td>6</td>
<td>Wisconsin:</td>
<td># 6</td>
</tr>
<tr>
<td>7</td>
<td>Florida:</td>
<td>#22</td>
</tr>
<tr>
<td>8</td>
<td>Colorado:</td>
<td>#19</td>
</tr>
<tr>
<td>9</td>
<td>Montana:</td>
<td># 4</td>
</tr>
<tr>
<td>10</td>
<td>North Dakota:</td>
<td># 5</td>
</tr>
<tr>
<td>11 (tie)</td>
<td>Massachusetts:</td>
<td>#41</td>
</tr>
<tr>
<td>11 (tie)</td>
<td>Arizona:</td>
<td>#13</td>
</tr>
<tr>
<td>13</td>
<td>Vermont:</td>
<td>#22</td>
</tr>
<tr>
<td>14</td>
<td>Alaska:</td>
<td>#25</td>
</tr>
<tr>
<td>15</td>
<td>Rhode Island:</td>
<td>#39</td>
</tr>
<tr>
<td>16</td>
<td>Minnesota:</td>
<td>#30</td>
</tr>
<tr>
<td>17 (tie)</td>
<td>South Dakota:</td>
<td># 8</td>
</tr>
<tr>
<td>17 (tie)</td>
<td>New Mexico:</td>
<td># 6</td>
</tr>
<tr>
<td>19 (tie)</td>
<td>Hawaii:</td>
<td>#24</td>
</tr>
<tr>
<td>19 (tie)</td>
<td>Louisiana:</td>
<td>#11</td>
</tr>
<tr>
<td>21</td>
<td>Maine:</td>
<td>#28</td>
</tr>
<tr>
<td>22 (tie)</td>
<td>South Carolina:</td>
<td>#16</td>
</tr>
<tr>
<td>22 (tie)</td>
<td>Oregon:</td>
<td>#32</td>
</tr>
<tr>
<td>24</td>
<td>Illinois:</td>
<td>#27</td>
</tr>
<tr>
<td>25</td>
<td>Idaho:</td>
<td>#37</td>
</tr>
<tr>
<td>26</td>
<td>Missouri:</td>
<td>#20</td>
</tr>
<tr>
<td>27</td>
<td>New Jersey:</td>
<td>#48</td>
</tr>
<tr>
<td>28</td>
<td>Nebraska:</td>
<td>#11</td>
</tr>
<tr>
<td>29 (tie)</td>
<td>Connecticut:</td>
<td>#49</td>
</tr>
<tr>
<td>29 (tie)</td>
<td>California:</td>
<td>#42</td>
</tr>
</tbody>
</table>

*RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019*
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.

### 86.4 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 marketshare 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>Demographic</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.
87

BEER

87.1 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.bevinfogroup.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:

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019

• 417 •
- 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%

### 87.2 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%)

### 87.3 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 (-0.1%)
- 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*

### 87.4 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>
87.5 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

87.6 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
87.7 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>Sales</th>
<th>Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angry Orchard: $214.5 million</td>
<td>6,319 cases*</td>
</tr>
<tr>
<td>Woodchuck: $ 38.1 million</td>
<td>1,115 cases</td>
</tr>
<tr>
<td>Johnny Appleseed: $ 22.6 million</td>
<td>717 cases</td>
</tr>
<tr>
<td>Smith and Forge: $ 21.3 million</td>
<td>697 cases</td>
</tr>
<tr>
<td>Strongbow: $ 16.3 million</td>
<td>480 cases</td>
</tr>
<tr>
<td>Stella Artois Cidre: $ 11.9 million</td>
<td>266 cases</td>
</tr>
<tr>
<td>Crispin: $ 8.4 million</td>
<td>188 cases</td>
</tr>
<tr>
<td>Michelob Cider: $ 7.3 million</td>
<td>236 cases</td>
</tr>
<tr>
<td>Hornsby’s: $ 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

87.8 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.

87.9 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.be FileInfoGroup.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)
88

DISTILLED SPIRITS

88.1 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></th>
<th>1990</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vodka</td>
<td>22%</td>
<td>34%</td>
</tr>
<tr>
<td>Whiskey</td>
<td>37%</td>
<td>23%</td>
</tr>
<tr>
<td>- straight</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>- Canadian</td>
<td>13%</td>
<td>7%</td>
</tr>
<tr>
<td>- Scotch</td>
<td>10%</td>
<td>4%</td>
</tr>
<tr>
<td>- blended</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>- Irish</td>
<td>&lt;1%</td>
<td>1%</td>
</tr>
<tr>
<td>Rum</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>Cordials and liqueurs</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Tequila</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>Gin</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Brandy and cognac</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>RTD cocktails</td>
<td>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></th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>210.30 million cases (2.2%)</td>
<td>$23.10 billion (4.0%)</td>
</tr>
<tr>
<td>Whiskey</td>
<td>56.61 million cases (7.3%)</td>
<td>$ 7.53 billion (7.4%)</td>
</tr>
<tr>
<td>Vodka</td>
<td>66.94 million cases (1.6%)</td>
<td>$ 5.77 billion (3.3%)</td>
</tr>
<tr>
<td>Cordials and liqueurs</td>
<td>20.41 million cases (-1.1%)</td>
<td>$ 2.46 billion (-0.3%)</td>
</tr>
<tr>
<td>Rum</td>
<td>25.18 million cases (-1.5%)</td>
<td>$ 2.37 billion (-0.8%)</td>
</tr>
</tbody>
</table>

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019
• 424 •
• Tequila: 13.80 million cases (5.0%) $ 2.11 billion (4.0%)
• Brandy and cognac: 11.53 million cases (3.7%) $ 1.71 billion (10.3%)
• Gin: 10.04 million cases (-2.7%) $ 866 million (-0.1%)
• RTD cocktails: 5.68 million cases (-10.4%) $ 315 million (-10.6%)
* 9-liter case equivalents

88.2 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 Horizonte
• 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

### 88.3 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>
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.

### 88.4 Cordials and Liqueurs

Shipments 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%)
• 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.

### 88.5 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_

88.6 RTD Cocktails

Shipments and distiller revenue for ready-to-drink (RTD) cocktails have been as follows (source: DISCUS):

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>6.27 million cases</td>
<td>$348 million</td>
</tr>
<tr>
<td>2014</td>
<td>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%)

88.7 Rum

Shipments and distiller revenue for rum 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>24.88 million cases</td>
<td>$2.18 billion</td>
</tr>
<tr>
<td>2011</td>
<td>25.12 million cases</td>
<td>$2.27 billion</td>
</tr>
<tr>
<td>2012</td>
<td>25.50 million cases</td>
<td>$2.32 billion</td>
</tr>
<tr>
<td>2013</td>
<td>25.57 million cases</td>
<td>$2.39 billion</td>
</tr>
<tr>
<td>2014</td>
<td>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%)
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

• 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%)
88.8 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
88.9 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

88.10 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>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010: 15.44 million cases</td>
<td>$1.91 billion</td>
</tr>
<tr>
<td>2011: 16.04 million cases</td>
<td>$2.06 billion</td>
</tr>
<tr>
<td>2012: 16.88 million cases</td>
<td>$2.22 billion</td>
</tr>
<tr>
<td>2013: 18.03 million cases</td>
<td>$2.45 billion</td>
</tr>
<tr>
<td>2014: 19.36 million cases</td>
<td>$2.68 billion</td>
</tr>
</tbody>
</table>

Canadian Whisky

<table>
<thead>
<tr>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010: 15.81 million cases</td>
<td>$1.50 billion</td>
</tr>
<tr>
<td>2011: 15.70 million cases</td>
<td>$1.55 billion</td>
</tr>
<tr>
<td>2012: 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></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></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 whiskeys, 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_

<table>
<thead>
<tr>
<th>Canadian Whisky</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Crown Royal:</td>
<td>4.28 million cases (-0.5%)</td>
</tr>
<tr>
<td>Black Velvet:</td>
<td>2.05 million cases (1.7%)</td>
</tr>
<tr>
<td>Canadian Mist:</td>
<td>1.49 million cases (-3.1%)</td>
</tr>
<tr>
<td>Canadian Club:</td>
<td>1.21 million cases (1.0%)</td>
</tr>
<tr>
<td>Windsor Supreme:</td>
<td>896,000 cases (-4.6%)</td>
</tr>
<tr>
<td>Rich &amp; Rare:</td>
<td>870,000 cases (4.2%)</td>
</tr>
<tr>
<td>Seagram’s V.O.:</td>
<td>820,000 cases (-5.7%)</td>
</tr>
<tr>
<td>Canadian LTD:</td>
<td>685,000 cases (-2.1%)</td>
</tr>
<tr>
<td>Canadian Hunter:</td>
<td>392,000 cases (-0.8%)</td>
</tr>
<tr>
<td>Lord Calvert:</td>
<td>370,000 cases (-10.5%)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Irish Whiskey</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Jameson:</td>
<td>2.01 million cases (7.7%)</td>
</tr>
<tr>
<td>Bushmills:</td>
<td>185,000 cases (-11.9%)</td>
</tr>
<tr>
<td>Tullamore Dew:</td>
<td>141,000 cases (23.2%)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Scotch Whisky</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>House of Dewar’s:</td>
<td>1.19 million cases (-4.6%)</td>
</tr>
<tr>
<td>Johnnie Walker Black:</td>
<td>886,000 cases (-5.7%)</td>
</tr>
<tr>
<td>Johnnie Walker Red:</td>
<td>712,000 cases (0.3%)</td>
</tr>
<tr>
<td>Clan MacGregor:</td>
<td>463,000 cases (-1.5%)</td>
</tr>
<tr>
<td>Buchanan:</td>
<td>430,000 cases (28.4%)</td>
</tr>
<tr>
<td>The Glenlivet:</td>
<td>387,000 cases (no change)</td>
</tr>
<tr>
<td>Chivas Regal:</td>
<td>358,000 cases (-8.7%)</td>
</tr>
</tbody>
</table>
**88.11 Market Resources**

Beverage Information Group, 17 High Street, 2nd Floor, Norwalk, CT 06851. (203) 855-8499. ([www.beveragenet.net](http://www.beveragenet.net))

89.1 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 million gallons</td>
<td>609 million gallons</td>
<td>2.34 gallons</td>
</tr>
<tr>
<td>2006</td>
<td>717 million gallons</td>
<td>628 million gallons</td>
<td>2.40 gallons</td>
</tr>
<tr>
<td>2007</td>
<td>742 million gallons</td>
<td>647 million gallons</td>
<td>2.46 gallons</td>
</tr>
<tr>
<td>2008</td>
<td>746 million gallons</td>
<td>650 million gallons</td>
<td>2.45 gallons</td>
</tr>
<tr>
<td>2009</td>
<td>763 million gallons</td>
<td>666 million gallons</td>
<td>2.49 gallons</td>
</tr>
<tr>
<td>2010</td>
<td>784 million gallons</td>
<td>681 million gallons</td>
<td>2.53 gallons</td>
</tr>
<tr>
<td>2011</td>
<td>836 million gallons</td>
<td>724 million gallons</td>
<td>2.68 gallons</td>
</tr>
<tr>
<td>2012</td>
<td>856 million gallons</td>
<td>749 million gallons</td>
<td>2.73 gallons</td>
</tr>
<tr>
<td>2013</td>
<td>886 million gallons</td>
<td>769 million gallons</td>
<td>2.80 gallons</td>
</tr>
<tr>
<td>2014</td>
<td>893 million gallons</td>
<td>769 million gallons</td>
<td>2.80 gallons</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</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):
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.
89.2 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 (3.2%)
- Woodbridge by Robert Mondavi: $310.6 million (4.4%)
- Yellow Tail: $295.8 million (-2.5%)

89.3 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 drinker (once per week or more frequently): 13%
• Marginal consumer of wine (once every two or three months): 27%
• Drink beer or spirits only: 24%
• Do not consume alcoholic beverages: 36%

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
89.4 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

89.5 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 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.

89.6 Market Resources

Wine Institute, 425 Market Street, Suite 1000, San Francisco, CA 94105. (415) 512-0151. (www.wineinstitute.org)

90

CARBONATED SOFT DRINKS

90.1 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*

90.2 Market Assessment
Euromonitor assesses the 2014 CSD market as follows (change from prior year
in parenthesis):

• Non-colas: $19.67 billion (-1.3%)
• Colas: $17.43 billion (-3.9%)
• Total: $37.01 billion (-2.6%)

### 90.3 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*
90.4 Market Leaders

State Of The Beverage Market 2015, by Beverage World, reports overall marketshare 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%

Marketshare 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)

90.5 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

91.1 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-Harlinguen-McAllen-Weslaco, TX
- Dallas-Ft. Worth, TX
- Salt Lake City, NV
- Las Vegas, NV
- Richland-Yakima-Pasco-Kennewick, WA

### 91.2 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%)

91.3 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%)

91.4 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)

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“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

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91.5 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](http://www.drinkjustchill.com)), Marley’s Mellow Mood from Marley Beverage Company ([www.drinkmarley.com](http://www.drinkmarley.com)), and Neuro Bliss and Neuro Sleep from Neuro Drinks ([www.drinkneuro.com](http://www.drinkneuro.com)).

The market is in its infancy, with total annual sales estimated at less than $50 million.

**91.6 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.
92

JUICE & FRUIT DRINKS

92.1 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.

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“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

__________________________________________
## 92.2 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%)
92.3 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

92.4 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
93

COFFEE

93.1 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.

93.2 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.

93.3 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.

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“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.

93.4 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):
93.5 Coffeeshops
Coffeeshops are assessed in Chapter 33.

93.6 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

93.7 Market Resources
National Coffee Association, 45 Broadway, Suite 1140, New York, NY 10006. (212) 766-4007. (www.ncausa.org)

Specialty Coffee Association of America, 117 W. 4th Street, Suite 300, Santa Ana, CA 92701. (562) 624-4100. (www.scaa.org)
94.1 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

94.2 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

94.3 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.

94.4 Market Resources
Tea Association of the USA, 362 Fifth Avenue, Suite 801, New York, NY 10001. (212) 986-9415. (www.teausa.com)
BOTTLED WATER

95.1 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).

### 95.2 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%

### 95.3 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 AcquaPanna, 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%

95.4 Market Resources
International Bottled Water Association, 1700 Diagonal Road, Suite 650, Alexandria, VA 22314. (703) 683-5213. (www.bottledwater.org)
96.1 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></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.

96.2 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.

96.3 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%

96.4 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.

96.5 Market Resources


BEVERAGE SERVICE IN RESTAURANTS

97.1 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.

97.2 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

97.3 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.

97.4 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
97.5 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

97.6 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 merengues to dollops of boozy ice-cream floating in your fizz, cocktails are being reworked in new, munchable ways.”

The Guardian, 12/11/15
97.7 Beverage Trends

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
98

CLEAN PLATE AWARDS

98.1 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.

98.2 Award Recipients 2016
In 2016, the Clean Plate Awards were as follows:

• Agnolotti Del Plin (Cotogna; San Francisco, CA)
• Beef Ribs (Pecan Lodge; Dallas, TX)
• Beef and Mushroom Tofu (Beverly Soon Tofu; Los Angeles, CA)
• Ceviche Sampler (El Coraloense; Bell Gardens, CA)
• Chicken for Two (Zuni Café; San Francisco, CA)
• Chocolate Cream Pie (Bavette’s; Chicago, IL)
• Chronic Breakfast Sandwich (Rioja; Denver, CO)
• Cochinillo with Banana Puree and Grilled Red Onion (1919 Restaurant; San Juan, PR)
• Grilled Octopus (Osteria Mozza; Los Angeles, CA)
• Housemade Ricotta Appetizer (1913 Restaurant & Bar; Roselle, IL)
• Marinated Cabbage (Vic’s; New York, NY)
• Meze Plate (The Dearborn; Chicago, IL)
• North Carolina Shrimp & Sea Scallops (Bouley; New York, NY)
• Pecan Do It (Batter Griddle & Drinkery; Portland, OR)
• Poached Mackerel with Fingerling Potatoes (Contra; New York, NY)
• Pork Shank for Two (Pasquale Jones; New York, NY)
• Pozole Verde (Rustic Canyon Wine Bar and Seasonal Kitchen; Santa Monica, CA)
• Roasted Butternut Squash Soup (Spruce; San Francisco, CA)
• Roasted Carrot Salad/Mezze (Shaya; New Orleans, LA)
• Rolled Tacos (Chico’s Tacos; El Paso, TX)
• Salty Dog Burger (BRGRBelly; Chicago, IL)
• Salumi (Lupa; New York, NY)
• Sarde Al Forno (Peasant; New York, NY)
• Southwest Salad (Protein Bar; multiple locations)
• Sugar Snap Pea and Pear Salad (Bâco Mercat; Los Angeles, CA)
- The Meatery Board (Toups Meatery; New Orleans, LA)
- Thick-cut Bacon with Black Pepper and Dark Chocolate (Prime & Provisions Steakhouse; Chicago, IL)
- Triple Coconut Cream Pie (Dahlia Bakery; Seattle, WA)
- Veal Brains, Vandouvan, Apricot Puree, Carrot (Animal; Los Angeles, CA)

### 98.3 Recent Awards

The following menu items were selected for Clean Plate Awards in 2013, 2014, and 2015:
- Ahi Yakusugi (Momotaro; Chicago, IL)
- Artisan Cheese Plate with Castelfranco radicchio “ham” (Meadowood; St. Helena, CA)
- BBQ Shrimp (W.H. Stiles Fish Camp, Ponce City Market; Atlanta, GA)
- Beef on tasting menu (Eleven Madison Park; New York, NY)
- Beijing Duck Feast (Sun Wah BBQ; Chicago, IL)
- Berkshire Pig Head Carnitas (CBD Provisions; Dallas, TX)
- Biscuits (Sweet Cheeks Q; Boston, MA)
- Bologna sandwich on rye with onions (Eisenberg’s Sandwich Shop; New York, NY)
- Boudin Noir (Parachute; Chicago, IL)
- Brisket Frito Pie (La Barbecue; Austin TX)
- Burger and frozen custard (Shake Shack at JFK Airport; New York, NY)
- Calves Liver with Sauteed Onions (Al Biernat’s; Dallas, TX)
- Catfish Salad (Lan Larb; 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)
- Cuban (Xoco; Chicago, IL)
- Deconstructed Latte (Indaba Coffee; Spokane, WA)
- Doughnuts (Twin Peaks Coffee & Donuts; Tannersville, NY)
- 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)
- Famous Ferdi Special (Mother’s Restaurant; New Orleans, LA)
- Filet of beef steak (Quality Meats; New York, NY)
- Filet Mignon (Empire Steak House; New York, NY)
- Fried hen-of-the-woods mushrooms (Elizabeth Restaurant; Chicago, IL)
- Fried Brussels sprouts (The Radler; Chicago, IL)
- Fried Chicken (Willie Mae’s Scotch House; New Orleans, LA)
- Fusilli in Cartoccio (Roberto’s Restaurant; Bronx, NY)
- Hamachi crudo (qui; Austin TX)
- Kimchee Bokkum (Ban Po Jung; Chicago, IL)
- Langoustines (Costa di Mare at the Wynn Hotel; Las Vegas, NV)
- Maple-Bacon Doughnut (Dutch Monkey Doughnuts; Cumming, GA)
- Mapo Dofou (Xiao Bao Biscuit; Charleston, SC)
• Maytag Blue Cheese Potato Chips (Jasper’s; Plano TX)
• Meatloaf sandwich on brioche (Gjelina Take Away; Long Beach, CA)
• Mimi’s Fried Chicken (Jasper’s; Plano, TX)
• Mini Wafels (Wafels & Dinges; New York, NY)
• Momotaro Tartare (Momotaro; Chicago, IL)
• Omakase Menu (Zuma at Epic Hotel; Miami, FL)
• Original Cheddar Fries (Snuffer’s Restaurant & Bar; Dallas, TX)
• 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)
• Roasted Marrow Bones (Brasserie Ten Ten; Boulder, CO)
• Seared Diver Scallops (Girl & The Goat; Chicago, IL)
• Seasonal pizza (Napolese; Indianapolis, IN)
• Smoked Meat Croquettes (Joe Beef; Montreal, PQ, Canada)
• Spinach Chickpea Cazuela with cumin and roasted garlic (Barcelona Wine Bar & Restaurant; Atlanta, GA)
• Temaki (KazuNori; Los Angeles, CA)
• Tiradito (Matsuhisa; Los Angeles, CA)
• Tortilla Soup (Fearing’s Restaurant at The Ritz-Carlton; Dallas, TX)
• Tortillas (Cosme; New York, NY)
• Uovo in Raviolo (SD26; New York, NY)
• Vegan Chicarrones Locos (El Rey Coffee Bar & Luncheonette; New York, NY)
• Wise Guy Pizza (Freds at Barneys; New York, NY)
CONCEPT AWARDS

99.1 Top Concepts

*Food Management* annually honors operations for excellence and innovation with its Best Concepts awards program. The following are recent award winners:

2017

- **Best of Show:** UNC REX Healthcare
- **Best Convenience Retailing Concept:** The Grid at Liberty University/Sodexo
- **Best Customer Service Concept:** Gathering Place and 1North at Purdue University
- **Best Management Company Concept:** Morrison Healthcare
- **Best Renovation:** Café 36, Microsoft and Eurest
- **Best Special Event:** Tasting the Tree of Life, The College of New Jersey/Sodexo
- **Best Wellness Concept:** Build Your Own Healthy Living Meal, FLIK Hospitality Group at American Express

2016

- **Best of Show:** Minneapolis Public Schools
- **Best Convenience Retailing Concept:** Food To Go at Brigham Young University
- **Best Management Company Concept:** eat.learn.live School Garden Program from Chartwells School Dining
- **Best Menu:** Tapas at Boston College
- **Best New Facility:** Café 83 at Microsoft
- **Best Renovation:** Central Table at Barnes Jewish Hospital
- **Best Special Event:** Every Menu Has a Story at Senior Living Communities
- **Best Wellness Concept:** Peak Performance Packs at Chandler (Arizona) Unified School District
99.2 Top Innovators

*Food Management* also annually recognizes top innovators in food service contract management. Recent award winners are as follows:

**2017**

- Business & Industry Innovator of the Year: Bartolotta Restaurants at Kohl’s Headquarters
- K-12 Innovator of the Year: Gwinnett County (Georgia) Public Schools
- College Innovator of the Year: Duke University
- Healthcare Innovator of the Year: Geisinger Health System

**2016**

- Business & Industry Innovator of the Year: Capital One
- K-12 Innovator of the Year: Greeley-Evans Weld County (Colorado) School District 6
- College Innovator of the Year: University of Texas at Dallas
- Healthcare Innovator of the Year: Boston Children’s Hospital

**2015**

- Business & Industry Innovator of the Year: Prime Business Dining
- K-12 Innovator of the Year: El Monte (California) City Schools
- College Innovator of the Year: North Carolina State University
- Healthcare Innovator of the Year: St. Jude Children’s Research Hospital
100

CONSUMER PICKS

100.1 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 2016 top-ranked brands, based on ratings of 171 restaurant chain brands, were published by Nation’s Restaurant News and are presented in this chapter.

100.2 Favorites By Segment
The top restaurant brands by type of service are as follows:
Casual-Dining
1. The Cheesecake Factory
2. The Melting Pot
3. Bonefish Grill
4. Red Lobster
5. Romano’s Macaroni Grill
6. Carrabba’s Italian Grill
7. Olive Garden
8. Ninety Nine Restaurant & Pub
9. Mellow Mushroom Pizza Bakers
10. Chevys Fresh Mex
Family-Dining
1. Cracker Barrel Old Country Store
2. First Watch
3. Shari’s Cafe and Pies
4. Original Pancake House
5. Bob Evans Restaurants
6. Shoney’s
7. Coco’s Bakery Restaurant
8. Johnny Rockets
9. IHOP
10. Big Boy

Fine-Dining
1. Morton’s The Steakhouse
2. Ruth’s Chris Steak House
3. The Capital Grille
4. Fleming’s Prime Steakhouse & Wine Bar
5. McCormick & Schmick’s

Limited-Service
1. Ben & Jerry’s
2. Häagen-Dazs
3. In-N-Out Burger
4. Chick-fil-A
5. Rubio’s
6. Smoothie King
7. Bruster’s Real Ice Cream
8. Red Mango
9. Pei Wei Asian Diner
10. Krispy Kreme Doughnuts

The top restaurant brands by type of menu are as follows:

Asian/Noodles
1. Pei Wei Asian Diner
2. Sarku Japan
3. Noodles & Company

Bakery-Cafe
1. Corner Bakery Cafe
2. Panera Bread
3. Einstein Bros. Bagels
Beverage-Snack
1. Smoothie King
2. Krispy Kreme Doughnuts
3. Peet’s Coffee & Tea

Buffet
1. Sizzler
2. Hometown Buffet
3. Souplantation/Sweet Tomatoes

Burger
1. In-N-Out Burger
2. Smashburger
3. Five Guys Burgers and Frys

Chicken
1. Chick-fil-A
2. Pollo Tropical
3. Raising Cane’s Chicken Fingers

Frozen Treats
1. Ben & Jerry’s
2. Häagen-Dazs
3. Bruster’s Real Ice Cream

Italian
1. Romano’s Macaroni Grill
2. Carrabba’s Italian Grill
3. Olive Garden

Mexican
1. Rubio’s
2. Qdoba Mexican Eats
3. Baja Fresh Mexican Grill

Pizza
1. Godfather’s Pizza
2. Papa Murphy’s Take N’ Bake
3. Marco’s Pizza

Sandwich
1. Blimpie America’s Sub Shop
2. Charley’s Grilled Subs
3. Quiznos
Seafood
1. Bonefish Grill
2. Red Lobster
3. Joe’s Crab Shack

Steak
1. Texas Roadhouse
2. Lone Star Steakhouse
3. LongHorn Steakhouse

Varied Menu
1. The Cheesecake Factory
2. The Melting Pot
3. Ninety-Nine Restaurant & Pub

100.3 Market Resources
WD Partners, 7007 Discovery Boulevard, Dublin, OH 43017. (614) 634-7000. (www.wdpartners.com)
CONSUMERS’ CHOICE AWARDS

101.1 Overview
Technomic (www.technomic.com) presents annual Chain Restaurant Consumers’ Choice Awards. The awards were first presented in 2013.
The 2017 awards were based on surveys following 100,000 restaurant visits where consumers rated 120 restaurant chains on more than 60 different attributes.

101.2 Award Winners 2017

Food Taste And Flavor
- Quick-service: In-N-Out Burger
- Fast-casual: Schlotzsky’s
- Full-service: Texas Roadhouse

Intent to Return
- Quick-service: Papa Murphy’s Pizza
- Fast-casual: Raising Cane’s Chicken Fingers
- Full-service: Cheddar’s Scratch Kitchen

Use Of Technology To Improve The Customer Experience
- Quick-service: Papa John’s
- Fast-casual: Pollo Campero
- Full-service: The Capital Grille

Takeout Capabilities
- Quick-service: Hungry Howie’s
- Fast-casual: Jimmy John’s Gourmet Sandwiches
- Full-service: Brio Tuscan Grille

101.3 Market Resources
Technomic, Inc., 300 South Riverside Plaza, Suite 1200 South, Chicago, IL 60606.
(312) 876-0004. (www.technomic.com)
102

DISTINGUISHED RESTAURANTS

102.1 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.

102.2 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)
• Mélisse Restaurant (Santa Monica)
• Michael’s Restaurant (Santa Monica)
• Mille Fleurs (Rancho Santa Fe)
• Mr. Stox Restaurant (Anaheim)
• Musso and Frank Grill (Hollywood)
• Mustards Grill (Napa)
• Napa Rose (Anaheim)
• One Market Restaurant (San Francisco)
• Pacific’s Edge (Carmel)
• Pacifica Seafood Restaurant (Palm Desert)
• Paolo’s Restaurant (San Jose)
• Park Avenue Steaks & Chops (Stanton)
• Patina (Los Angeles)
• Postrio (San Francisco)
• The Cellar (Fullerton)
• The French Laundry (Yountville)
• The Grill on Hollywood (Hollywood)
• The Grill on the Alley (Beverly Hills)
• The Hobbit Restaurant (Orange, CA)
• The Marine Room (La Jolla)
• The Plumed Horse (Saratoga)
• The Restaurant at Wente Vineyards (Livermore)
• The Sardine Factory (Monterey)
• The Sky Room (Long Beach)
• The Winery at the District (Tustin)
• Tommy Toy’s Cuisine Chinoise (San Francisco)
• Trader Vic’s (Emeryville)
• Valentine Restaurant (Santa Monica)
• Wally’s Desert Turtle (Rancho Mirage)
• Water Grill Restaurant (Los Angeles)

**Colorado**
• Beano’s Cabin (Avon)
• Broker Restaurant (Denver)
• Brook’s Steakhouse (Greenwood Village)
• Charles Court (Colorado Springs)
• Flagstaff House (Boulder)
• Larkspur Restaurant (Vail)
• Left Bank Restaurant (Vail)
• Ludwig’s (Vail)
• Mirabelle Restaurant at Beaver Creek (Avon)
• Palace Arms at The Brown Palace Hotel (Denver)
• Restaurant Kevin Taylor (Denver)
• Strings (Denver)
• Syzygy (Aspen)
• Terra Bistro (Denver)
• The Cliff House Dining Room (Manitou Springs)
• The Penrose Room (Colorado Springs)
• The Tuscany (Denver)

**Connecticut**
• Bernard’s (Ridgefield)
• Cavey’s Restaurant (Manchester)
• Rebeccas (Greenwich)
• Restaurant Jean-Louis (Greenwich)

**Delaware**
• Columbus Inn (Wilmington)
• The Green Room (Wilmington)

**District of Columbia**
• 1789 Restaurant (Washington)
• 701 Restaurant (Washington)
• Bombay Club (Washington)
• Equinox Restaurant (Washington)
• i Ricchi (Washington)
• Kinkead’s An American Brasserie (Washington)
• Marcel’s (Washington)
• Michel Richard Citronelle (Washington)
• Smith & Wollensky (Washington)
• Taberna Del Alabardero (Washington)
• Teatro Goldoni (Washington)
• The Caucus Room (Washington)
• The Oceanaire Seafood Room (Washington)
• The Oval Room (Washington)
• The Prime Rib (Washington)

Florida
• 30 Degree Blue (Panama City Beach)
• 32 East (Delray Beach)
• 95 Cordova Restaurant and Cobalt Lounge (St. Augustine)
• Armani’s at the Grand Hyatt Tampa Bay (Tampa)
• Arturo’s Ristorante (Boca Raton)
• Atlantic’s Edge at Cheeca Lodge & Spa (Islamorada)
• Bern’s Steak House (Tampa)
• Bistro AIX (Jacksonville)
• Brooks Restaurant (Deerfield Beach)
• Café Cellini (Palm Beach)
• Café Chardonnay (Palm Beach Gardens)
• Café 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)
• SideBerna (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)
- Cité’ 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)
- 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)
- Òran Mór (Nantucket)
- Sonoma Restaurant (Princeton)
- The Summer House Restaurant (Siasconset)
- Top of the Hub (Boston)

Michigan
- Big Rock Chop House (Birmingham)
- La Bistecca Italian Grille (Plymouth)
- Opus One (Detroit)
- Ristorante Café Cortina (Farmington Hills)
- Schuler's Restaurant & Pub (Marshall)
- The English Inn Restaurant & Pub (Eaton Rapids)
- The Lark (West Bloomfield)
- The Rattlesnake Club (Detroit)
- The Whitney (Detroit)

Minnesota
- Lord Fletcher’s Old Lake Lodge (Minnetonka)
- The St. Paul Grill (Saint Paul)

Mississippi
- BR Prime Steakhouse (Biloxi)
- Chicago Steakhouse at the Gold Strike Casino Resort (Tunica Resorts)
- Fairbanks Steakhouse (Tunica Resorts)
• Huntingtons Grille at the Hilton Jackson Hotel (Jackson)
• Jack Binion’s Steak House (Tunica Resorts)

Missouri
• Al’s Restaurant (St. Louis)
• Annie Gunn’s (Chesterfield)
• dominic’s (St. Louis)
• Dominic’s Trattoria (St. Louis)
• Jasper’s (Kansas City)
• John Mineo’s Italian Restaurant (St. Louis)
• Station Grille Restaurant (St. Louis)
• Tony’s of St. Louis (St. Louis)

Montana
• Rainbow Ranch Restaurant (Big Sky)

Nevada
• Adele’s (Carson City)
• Alize at the Top of the Palms (Las Vegas)
• Andre’s at the Monte Carlo Resort (Las Vegas)
• Ferraro’s Restaurant (Las Vegas)
• Harrah’s Steak House (Reno)
• La Strada (Reno)
• Le Cirque (Las Vegas)
• Mimmo Ferraro’s Restaurant (Las Vegas)
• Mon Ami Gabi (Las Vegas)
• Peppermill’s White Orchid (Reno)
• Picasso (Las Vegas)
• Piero’s Italian Cuisine (Las Vegas)
• Romanza at the Peppermill (Reno)
• Roxy (Reno)
• Smith & Wollensky (Las Vegas)

New Hampshire
• Sugar Hill Inn (Sugar Hill)
• The Bedford Village Inn (Bedford)
• The Dining Room at Mt. Washington Resort (Bretton Woods)

New Jersey
• Highlawn Pavilion at Eagle Rock Reservation (West Orange)
• Knife & Fork Inn (Atlantic City)
• L’Allegria Restaurant (Madison)
• La Spiaggia (Ship 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)

102.3 Market Resources
DiRona, 105 West Michigan Avenue, Marshall, MI 49068. (269) 789-9316. (www.dirona.com)
FAVORITE RESTAURANT CHAINS

103.1 Overview
Since 2014, Technomic (www.technomic.com) has annually surveyed consumers across the U.S. asking their favorite chain in various restaurant segments. The findings are published by Restaurant Business.

“The top-rated chains continue to deliver the best foodservice experience, which includes strong training and culture to support staff knowledge, attentiveness, and accuracy. Brands that provide innovative, flavorful new offerings, a high-value mix and great customer experience will win share and get high marks from customers.”

Darren Tristano, President
Technomic
Restaurant Business, 1/17

103.2 Favorite Restaurant Chains 2017
The overall favorite restaurant chains in the January 2017 survey were as follows:
1. Firehouse Subs
2. The Capital Grille
3. Chick-fil-A
4. Seasons 52
5. Maggiano’s Little Italy
103.3 Favorites By Segment

The top restaurant brands by type of service are as follows:

Casual-Dining
1. The Capital Grille
2. Seasons 52
3. Maggiano’s Little Italy
4. Chuy’s
5. Cheddar’s Scratch Kitchen

Family-Dining
1. Cracker Barrel Old Country Store
2. Shoney’s
3. Bob Evans
4. Huddle House
5. Perkins Restaurant & Bakery

Fast Casual
1. Firehouse Subs
2. Raising Cane’s Chicken Fingers
3. Schlotzsky’s Deli
4. McAlister’s Deli
5. Jason’s Deli

Quick-Service
1. Chick-fil-A
2. Papa Murphy’s Take N’ Bake
3. In-N-Out Burger
4. Culver’s
5. Potbelly Sandwich Shop

The top restaurant brands by type of menu are as follows:

Bakery-Cafe
1. Panera Bread
2. Corner Bakery Cafe
3. Einstein Bros. Bagels

Beverage-Snack
1. Krispy Kreme Doughnuts
2. Cold Stone Creamery
3. Jamba Juice
Burger
1. In-N-Out Burger
2. Culver’s
3. The Habit Burger Grill

Chicken
1. Chick-fil-A
2. Raising Cane’s Chicken Fingers
3. Zaxby’s

Italian
1. Maggiano’s Little Italy
2. Carrabba’s Italian Grill
3. Brio Tuscan Grill

Mexican
1. Chuy’s
2. Rubio’s
3. Moe’s Southwest Grill

Pizza
1. Papa Murphy’s Take N’ Bake
2. Marco’s Pizza
3. Godfather’s Pizza

Sandwich
1. Firehouse Subs
2. Schlotsky’s Deli
3. McAlister’s Deli

Seafood
1. Bonefish Grill
2. Joe’s Crab Shack
3. Red Lobster

Steak
1. The Capital Grille
2. LongHorn Steakhouse
3. Texas Roadhouse

Varied Menu
1. Seasons 52
2. Cheddar’s Scratch Kitchen
3. O’Charley’s
103.4 Market Resources
Restaurant Business, 1 Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181.
(630) 574-5075. (www.restaurantbusinessonline.com)

Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606.
(312) 876-0004. (www.technomic.com)
104.1 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.

104.2 Five-Diamond Award Winners
AAA designated the following restaurants with Five Diamond ratings for 2017:

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)

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)
Georgia
• The Georgian Room (in The Cloister, Sea Island)

Hawaii
• Chef Mavro (Honolulu)

Illinois
• Acadia (Chicago)
• Alinea (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 by Pierre Gagnaire (in the Mandarin Oriental, Las Vegas)

New York
• Blue Hill at Stone Barns (Tarrytown)
• Daniel (New York)
• Del Posto (New York)
• Eleven Madison Park (New York)
• Gabriel Kreuther (New York)
• Jean Georges Restaurant (in the Trump International Hotel & Towers, New York)
• Le Bernardin (New York)
• The Modern (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
- Lautrec (in the Nemacolin Woodlands Resort, Farmington)
- TÈ (in The Inn at Leona Village, Leona)

Virginia
- The Inn at Little Washington Dining Room (Washington)

Washington
- The Herbfarm (Woodinville)
105 FIVE-STAR AWARDS

105.1 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 2017:

**Arizona**
- Kai Restaurant (Chandler)

**California**
- Addison Restaurant (San Diego)
- Aubergine, the Restaurant at L'Auberge Carmel (Carmel)
- Mélisse (Santa Monica)
- Studio (Laguna Beach)
- The French Laundry (Yountville)
- The Restaurant at Meadowood (St. Helena)

**Colorado**
- Element 47 (Aspen)
- Penrose Room (Colorado Springs)

**District of Columbia**
- Plume (Washington)

**Florida**
- Naoe (Miami)

**Georgia**
- Georgian Room (Sea Island)

**Hawaii**
- La Mer (Honolulu)

**Illinois**
- Alinea (Chicago)
• Grace (Chicago)
• Sixteen (Chicago)

Maine
• The White Barn Inn Restaurant (Kennebunk)

Massachusetts
• Menton (Boston)
• The Dining Room at Wheatleigh (Lenox)

Nevada
• Joël Robuchon (Las Vegas)
• Le Cirque Las Vegas (Las Vegas)
• Picasso (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 (Farmington)
• TÈ Restaurant (Leola)
• Volvér Restaurant (Philadelphia)

Rhode Island
• Coast (Watch Hill)

Texas
• The Inn at Dos Brisas (Washington)

Virginia
• The Inn at Little Washington (Washington)
FOOD & WINE’S BEST NEW CHEFS

106.1 Overview
Food & Wine recognizes 10 Best New Chefs annually. To qualify, chefs must have run a kitchen for no longer than five years.

106.2 Award Winners 2017
Announced in the April 2017 issue of Food & Wine, the following were recognized as the Best New Chefs of 2017:
• Jay Blackinton (Hogstone’s Wood Oven; Orcas Island, WA)
• Val Cantu (Californios; San Francisco, CA)
• Peter Cho (Han Oak; Portland, OR)
• Nina Compton (Compère Lapin; New Orleans, LA)
• Diego Galicia and Rico Torres (Mixtli; San Antonio, TX)
• Jordan Kahn (Destroyer; Los Angeles, CA)
• Sara Kramer and Sarah Hymanson (Kismet; Los Angeles, CA)
• Angie Mar (The Beatrice Inn; New York, NY)
• Yoshi Okai (Otoko; Austin, TX)
• Noah Sandoval (Oriole; Chicago, IL)

106.3 Recent Award Winners
Food & Wine recognized the following as the Best New Chefs in recent years:
2016
• David Barzelay (Lazy Bear; San Francisco, CA)
• Kevin Fink (Emmer & Rye; Austin, TX)
• Michael Gulotta (MoPho; New Orleans, LA)
• Edouardo Jordan (Salare; Seattle, WA)
• Brad Kilgore (Alter; Miami, FL)
• Ravi Kapur (Liholiho Yacht Club; San Francisco, CA)
• Iliana Regan (Elizabeth; Chicago, IL)
• Aaron Silverman (Rose’s Luxury; Washington, DC)
• Jeremiah Stone (Contra and Wildair; New York, NY)
• Fabian Von Hauske (Contra and Wildair; New York, NY)
• Kris Yenbamroong (Night + Market Song; Los Angeles, CA)
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)
GREAT PIZZERIAS

107.1 Overview
The following section lists several awards and designations that recognize pizza restaurants throughout the U.S.

107.2 List Of Recognitions

Best Pizza Restaurants (Gayot, www.gayot.com)
- 2Amys Neapolitan Pizzeria (Washington, DC)
- Antico Pizza Napoletana (Atlanta, GA)
- Cofalire (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)
• Lucale (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 (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** ([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)
108

GREAT SEAFOOD RESTAURANTS

108.1 Overview
The following section lists several awards and designations that recognize seafood restaurants throughout the U.S.

108.2 List Of Recognitions

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)

Top 10 Seafood Restaurants in the U.S. (Gayot, www.gayot.com)
• 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 (Wisasset, 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 10 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)
GREAT STEAK HOUSES

109.1 Overview
The following section lists several awards and designations that recognize steakhouses throughout the U.S.

109.2 List Of Recognitions

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)
- 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)
- 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)
- 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 10 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)
110.1 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.

110.2 Award Winners 2017

Outstanding Restaurant
• Topolobampo (Chicago, IL)

Best New Restaurant
• Le Coucou (New York, NY)

Outstanding Chef
• Michael Solomonov (Zahav; Philadelphia, PA)

Rising Star Chef
• Zachary Engel (Shaya; New Orleans, LA)

Outstanding Pastry Chef
• Ghaya Oliveira (Daniel; New York, NY)

Outstanding Baker
• Mark Furstenberg (Bread Furst; Washington, DC)

Outstanding Bar Program
• Arnaud’s French 75 Bar (New Orleans, LA)

Outstanding Restaurateur
• Stephen Starr (Starr Restaurants - Le Coucou, Serpico, Upland, and others; Philadelphia; PA)
Outstanding Service
• Blue Hill at Stone Barns (Pocantico Hills, NY)

Outstanding Wine Program
• Canlis (Seattle, WA)

Outstanding Wine, Spirits, or Beer Professional
• Sam Calagione (Dogfish Head Craft Brewery; Milton, DE)

Best Chef: Great Lakes (IL, IN, MI, OH)
• Sarah Grueneberg (Monteverde; Chicago, IL)

Best Chef: Mid-Atlantic (D.C., DE, MD, NJ, PA, VA)
• Greg Vernick (Vernick Food & Drink; Philadelphia, PA)

Best Chef: Midwest (IA, KS, MN, MO, NE, ND, SD, WI)
• Kevin Nashan (Sidney Street Cafe; St. Louis, MO)

Best Chef: New York City (Five Boroughs)
• Marco Canora (Hearth; East Village)

Best Chefs: Northeast (CT, MA, ME, NH, NY State, RI, VT)
• Andrew Taylor and Mike Wiley (Eventide Oyster Co.; Portland, ME)

Best Chefs: Northwest (AK, ID, MT, OR, WA, WY)
• Gabrielle Quiñónez Denton and Greg Denton (Ox; Portland, OR)

Best Chef: South (AL, AR, FL, LA, MS)
• Rebecca Wilcomb (Herbsaint; New Orleans, LA)

Best Chef: Southeast (GA, KY, NC, SC, TN, WV)
• Steven Satterfield (Miller Union; Atlanta, GA)

Best Chef: Southwest (AZ, CO, NM, OK, TX, UT)
• Hugo Ortega (Hugo’s; Houston, TX)

Best Chef: West (CA, HI, NV)
• Corey Lee (Benu; San Francisco, CA)
110.3 Recent Award Winners

Outstanding Restaurant
- 2016: Alina (Chicago, IL)
- 2015: Blue Hill at Stone Barns (Pocantico Hills, NY)
- 2014: The Slanted Door (San Francisco, CA)
- 2013: Blue Hill (New York, NY)
- 2012: Boulevard (San Francisco, CA)

Best New Restaurant
- 2016: Shaya (New Orleans, LA)
- 2015: Bâtard (New York, NY)
- 2014: Pêche Seafood Grill (New Orleans, LA)
- 2013: State Bird Provisions (San Francisco, CA)
- 2012: Next (Chicago, IL)

Outstanding Chef
- 2016: Suzanne Goin (Lacques; Los Angeles, CA)
- 2015: Michael Anthony (Gramercy Tavern; New York, NY)
- 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)

Rising Star Chef
- 2016: Daniel Soto-Innes (Cosme; New York, NY)
- 2015: Jessica Largey (Mamresa; Los Gatos, CA)
- 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)

Outstanding Pastry Chef
- 2016: Dahlia Narvaez (Osteria Mozza; Los Angeles, CA)
- 2015: Christina Tosi (Momofuku; New York, NY)
- 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)

110.4 Market Resources
James Beard Foundation, 167 West 12th Street, New York, NY 10011. (212) 675-4984. (www.jamesbeard.org)
111

MENU MASTERS AWARDS

111.1 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.

111.2 Winners By Category

**Best Healthy Innovations**
- 2017: Panera Bread
- 2016: Stanford University Residential & Dining Enterprises
- 2015: Which Wich - Vegan Chicken Banh Mi, Buffalo Chicken
- 2014: First Watch - Quinoa Power Bowls
- 2013: Silver Diner - Kids Menu

**Best Limited-Time Offer**
- 2017: P.F. Chang’s - Local Menu
- 2016: The Melting Pot - Dip Into Summer Menu
- 2015: Popeyes Louisiana Kitchen - Buttermilk Biscuit Butterfly Shrimp
- 2014: Wendy’s - Pretzel Bacon Burger
- 2013: Papa John’s Pizza - Buffalo Chicken Pizza

**Best Menu/Line Extension**
- 2017: Aloha Plate at Brigham Young University - affordable Hawaiian cuisine
- 2016: Arby’s - sliders
- 2015: Smashburger - Organic Arugula, Truffle Mushroom & Swiss Burger
- 2014: McDonald’s - Premium McWraps
- 2013: Noodles & Company - Slow Braised, Naturally Raised Pork

**Best Menu Revamp**
- 2017: Denny’s
- 2016: Sodexo
- 2015: Bonefish Grill
- 2014: Joe’s Crab Shack
- 2013: Red Lobster
Best Menu Trendsetter
• 2017: By Chloe
• 2016: Slapfish
• 2015: Mendocino Farms
• 2014: True Food Kitchen
• 2013: Cooper’s Hawk Winery & Restaurants

Best New Menu Item
• 2017: Shake Shack - Chicken Shack Sandwich
• 2016: Jack in the Box - Classic Buttery Jack
• 2015: Chick-fil-A - Grilled Chicken Sandwich
• 2014: Chili’s Bar & Grill - Pizza Flatbreads
• 2013: Taco Bell - Doritos Locos Tacos

Chef/Innovator
• 2017: Stephanie Izard (Girl & The Goat)
• 2016: David Barzelay (Lazy Bear)
• 2015: Jimmy Bannos, Jr. (The Purple Pig)
• 2014: Michael Smith (Michael Smith Restaurant)
• 2013: Jonathon Sawyer (Greenhouse Tavern)

Menu Masters Hall of Fame
• Burt Cutino (The Sardine Factory)
• Colonel Sanders (Kentucky Fried Chicken)
• David Overton (The Cheesecake Factory)
• Emeril Lagasse (Emeril’s)
• Jacques Pepin (French Culinary Institute)
• Jasper White (Jasper’s, Summer Shack)
• John Besh (Besh Restaurant Group)
• Jon Luther (Dunkin’ Brands)
• Jose Garces (Amada, Tinto, Village Whiskey)
• José Andrés (Think Food Group)
• Martin Yan (Yan Can Restaurants)
• Mary Sue Milliken & Susan Feniger (Border Grill)
• Norman Van Aken (pioneer of Floribbean cuisine)
• Paul Prudhomme (K-Paul’s Louisiana Kitchen)
• Richard Melman (Lettuce Entertain You Enterprises)
• Roger Berkowitz (Legal Sea Foods)
• Stephan Pyles (modern Texas cuisine; various restaurants)
• Tom Colicchio (Colicchio & Sons, ‘wichcraft)
• Warren LeRuth (LeRuth’s)
• Wolfgang Puck (Spago, Postrio)
111.3 Market Resources
Nation’s Restaurant News, 249 W. 17th Street, New York, NY 10011. (212) 204-4200.
(www.nrn.com)
112

MICHELIN 3-STAR RESTAURANTS

112.1 Overview

112.2 Chicago 3-Star Restaurant
• Alinea
• Grace

112.3 New York 3-Star Restaurants
• Chef’s Table at Brooklyn Fare (Brooklyn)
• Eleven Madison Park
• Jean Georges
• Le Bernardin
• Masa
• Per Se

112.4 San Francisco and Napa Region 3-Star Restaurants
• Benu (San Francisco)
• Manresa (Los Gatos)
• Quince (San Francisco)
• Saison (San Francisco)
• The French Laundry (Yountville)
• The Restaurant at Meadowood (St. Helena)
OPEN TABLE’S BEST RESTAURANTS

113.1 Overview
Open Table’s 100 Best Restaurants in America is based on analysis of more than 10 million reviews of more than 24,000 restaurants in 50 states and the District of Columbia.

The following is the Open Table list of 100 Best Restaurants In America for 2016:

113.2 Best Restaurants In America 2016
- Acquerello (San Francisco, CA)
- Addison Restaurant (San Diego, CA)
- Andrew Michael Italian Kitchen (Memphis, TN)
- Angelini Osteria (Los Angeles, CA)
- Antebellum (Flowery Branch, GA)
- Arabellas Italian Ristorante (Winter Haven, FL)
- Arethusa al Tavolo (Bantam, CT)
- Ariana (Bend, OR)
- Auberge du Soleil (Rutherford, CA)
- barmini by José Andrés (Washington, DC)
- Barrio Café Gran Reserva (Phoenix, AZ)
- Bavettes (Chicago, IL)
- Bibou (Philadelphia, PA)
- Bida Manda Restaurant and Bar (Raleigh, NC)
- Bistro L’Hermitage (Woodbridge, VA)
- Bistro San Martin (Arlington, VA)
- Bliss Restaurant (San Antonio, TX)
- Bolete Restaurant (Bethlehem, PA)
- Bones (Atlanta, GA)
- Café Juanita (Kirkland, WA)
- Café Provence (Prairie Villa, KS)
- Camp Verde General Store and Restaurant (Camp Verde, TX)
- Carlos’ Bistro (Colorado Springs, CO)
- Castagna Restaurant (Portland, OR)
- Chachama Grill (East Patchogue, NY)
- Chama Gaucha (San Antonio, TX)
• Charleston (Baltimore, MD)
• Chef’s Table at Edgewater (Winter Garden, FL)
• Chez Francois (Vermillion, OH)
• Chez Nous French Restaurant (Humble, TX)
• Circle Brunch-The Breakers (Palm Beach, FL)
• Collage Restaurant (St. Augustine, FL)
• Daniel (New York, NY)
• Fat Canary (Williamsburg, VA)
• Fearrington House Restaurant (Pittsboro, NC)
• Fleurie (Charlottesville, VA)
• Flight Restaurant & Wine Bar (Memphis, TN)
• Franklinville Inn (Franklinville, NJ)
• Geronimo (Santa Fe, NM)
• goosefoot (Chicago, Illinois)
• Gramercy Tavern (New York, NY)
• Halls Chophouse (Charleston, SC)
• Harold Black (Washington, D.C.)
• Harvest Beat (Seattle, WA)
• Heirloom (Midway, KY)
• Highlands Bar & Grill (Birmingham, AL)
• Ijji Sushi (San Francisco, CA)
• Joan’s in the Park (Saint Paul, MN)
• Kai (Sheraton Grand at Wild Horse Pass Resort (Chandler, AZ)
• Kokkari Estiatoro (San Francisco, CA)
• L’Auberge Chez François (Great Falls, VA)
• L’Opposum (Richmond, VA)
• Le Coucou (New York, NY)
• Maison Blanche (Longboat Key, Florida)
• Mama’s Fish House (Paia, HI)
• Michael’s-South Point Casino (Las Vegas, NV)
• Mizuna (Denver, CO)
• Monarch (Scottsdale, AZ)
• O Ya (New York, NY)
• Orchids at Palm Court (Cincinnati, OH)
• Oriole (Chicago, IL)
• Peck’s Arcade (Troy, NY)
• Per Se (New York, NY)
• Peter Shields Inn (Cape May, NJ)
• Quince Restaurant (San Francisco, CA)
• Restaurant Lorena’s (Maplewood, NJ)
• Roe (Portland, OR)
• Russell’s Steaks, Chops, and More (Williamsville, NY)
• Ruth’s Chris Steak House (Baton Rouge, LA)
• Saint Jacques French Cuisine (Raleigh, NC)
• Seasons Restaurant-Four Seasons (Washington, DC)
• Sette (Bernardsville, NJ)
• Ski Tip Lodge (Keystone, CO)
• Sotto (Cincinnati, OH)
• St. Francis Winery & Vineyards (Santa Rosa, CA)
• State & Lemp (Boise, ID)
• Stonehouse at San Ysidro Ranch (Santa Barbara, CA)
• Sushi Nakazawa-Sushi Bar (New York, NY)
• Terra Restaurant (St. Helena, CA)
• The Capital Grille (Minneapolis, MN)
• The Cellar (Daytona Beach, FL)
• The French Room (Dallas, TX)
• The Goodstone Inn & Estate Restaurant (Middleburg, VA)
• The Hobbit (Orange, CA)
• The Inn at Little Washington (Washington, VA)
• The Kitchen Restaurant (Sacramento, CA)
• The Little Dipper (Wilmington, NC)
• The Metro Wine Bar & Bistro (Oklahoma City, OK)
• The Modern-Dining Room (New York, NY)
• The Painted Lady (Newberg, OR)
• The Restaurant at Gideon Ridge (Blowing Rock, NC)
• The Saddle River Inn (Saddle River, NJ)
• The Table at Season To Taste (Cambridge, MA)
• The Trattoria (Saint James, NY)
• Thomas Henkelmann-Homestead Inn (Greenwich, CT)
• Trattoria L’incontro (Astoria, NY)
• Truluck’s Seafood, Steak and Crab House (Austin, TX)
• Vetri (Philadelphia, PA)
• Yono’s Restaurant (Albany, NY)
• Zahav (Philadelphia, PA)

113.3 Market Resources
OpenTable, 1 Montgomery Street, Suite 700, San Francisco, CA 94104.
(www.opentable.com)
RESTAURANT NEIGHBOR AWARD

114.1 Award Winners 2017

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.

Three national Restaurant Neighborhood Awards were given in 2017, as follows:

- Gecko’s Grill & Pub (Sarasota, FL)
- International Dairy Queen (Minneapolis, MN)
- The Red Barn Restaurant (Augusta, ME)

The following restaurant operators were recognized by the National Restaurant Association in 2017 for their community-focused contributions:

**Alabama**
- Chef Will The Palate (Huntsville)

**Arizona**
- The Dhaba (Tempe)
- Wildflower Bread Company (Scottsdale)

**California**
- California Pizza Kitchen (various locations)
- Dos Coyotes Border Cafes (Davis)
- Green Street Restaurant (Pasadena)
- Hawks (Granite Bay)
- Phil’s BBQ (San Diego)
- Specialty Restaurants Corporation (Anaheim)
- The Sardine Factory (Monterey)
- Tito’s Tacos (Culver City)

**Colorado**
- Marco’s (Colorado Springs)

**Connecticut**
- BG Dining dba Grants Restaurant/ Restaurant Bricco/Bricco Trattoria (West Hartford)
District of Columbia
• Pizzeria Paradiso (Washington)

Delaware
• High 5 Hospitality LLC dba Buffalo Wild Wings (Bear)

Florida
• Alfie’s (Ormond Beach)
• Duffy’s Sports Grill (Lake Worth)
• Gecko’s Grill & Pub (Sarasota)
• Johnny Huston’s Grille & Bar (Navarre Beach)
• Neighborhood Restaurant Partners dba Applebee’s (Tampa)

Georgia
• Fifth Group Restaurants (Atlanta)
• Focus Brands dba Moe’s Southwest Grill (Atlanta)
• Marlow’s Tavern and Sterling Spoon Culinary Management (Atlanta)
• Norsan Restaurant Group (Duluth)
• Ray’s on the River (Atlanta)

Indiana
• Plat 99 Mixology Bar (Indianapolis)
• Public Greens/Patachou (Indianapolis)
• Scotty’s Brewhouse (Indianapolis)

Kansas
• Nick and Jake’s (Overland Park)

Kentucky
• Carr’s Steakhouse (Mayfield)
• Fazoli’s (Lexington)

Louisiana
• Arnaud’s Restaurant (New Orleans)
• Dat Dog (New Orleans)
• Langlois (New Orleans)
• Tusa Restaurant Group dba The Crazy Lobster Bar and Grill (New Orleans)

Maine
• The Frog and Turtle Gastro Pub (Westbrook)
• The Red Barn (Augusta)
Maryland
• AIDA Bistro & Wine Bar (Columbia)
• Blackwall Hitch (Annapolis)
• Glory Days Grill (Gaithersburg)

Massachusetts
• Horseshoe Grille.com (North Reading)
• Ninety Nine Restaurants (Woburn)
• Russell Morin Catering and Events (Attleboro)
• The Smoke Shop BBQ (Cambridge)

Michigan
• Buddy’s Pizza (Farmington Hills)

Minnesota
• Bites Grill & Bar (Pine River)
• Culver’s (West Saint Paul)
• International Dairy Queen (Minneapolis)
• Morrissey Hospitality Companies Inc. (Saint Paul)
• Red Cow (Minneapolis and Saint Paul)

Mississippi
• Newk’s Eatery (Jackson)

Missouri
• Gamlin Restaurant Group (St. Louis)
• Jimm’s Steakhouse and Pub (Springfield)

Nebraska
• daVinci’s (Lincoln)
• Goodcents Deli Fresh Subs (Lincoln)
• LaCasa Pizzaria (Omaha)
• Salt 88 (Omaha)
• Southern Hospitality Ventures (Lincoln)

New Hampshire
• Jumpin Jays Fish Cafe (Portsmouth)
• The Barley House (Concord)
• The Common Man Family in New Hampshire (Ashland)

Nevada
• Crazy Pita Rotisserie & Grill (Henderson)
• Ferraro’s Restaurant & Wine Bar (Las Vegas)
• Fleming’s Prime Steakhouse & Wine Bar (Las Vegas)
• Navarro-Issel Organization dba McDonald’s (Las Vegas)

**New Jersey**
• Doherty Enterprises (Rumson)
• Rio Station (Rio Grande)
• Salt Creek Grille (Rumson)
• WindMill Restaurants (Long Beach)

**New Mexico**
• Pizza 9 (Albuquerque)

**New York**
• Ben’s Kosher Restaurants (Bayside)
• Tasteful Connections (Rochester)

**North Carolina**
• Buku Global Street Food (Raleigh)
• Dugan’s Pub (Pinehurst)
• Eschelon Experiences (Raleigh)
• The Cantina at Historic Biltmore Village (Ashville)

**Ohio**
• Apple American Group dba Applebee’s (Independence)
• Max & Erma’s (Columbus)
• Wendy’s (Dublin)

**Oklahoma**
• SONIC Drive-In (Oklahoma City)
• Wayne’s Drive Inn (Lawton)

**Oregon**
• Bambuza Vietnam Kitchen (Portland)
• Papas Pizza (Eugene)
• Salt & Straw Ice Cream (Portland)
• Standing Stone Brewing Co. (Ashland)

**Pennsylvania**
• Flinchy’s Restaurant (Camp Hill)
• Irish Pub (Philadelphia)
• Punxsy Pizza (Punxsutawney)
• The Rose Group dba Applebee’s (Newtown)
Rhode Island
• George’s of Galilee (Narragansett)
• The Lodge Pub & Eatery (Lincoln)

South Carolina
• Blue Marlin (Columbia)

South Dakota
• Dairy Queen (Madison)

Tennessee
• A. Marshall Family Foods (Franklin)
• Flying Squirrel Bar (Chattanooga)
• Huey’s Restaurants (Memphis)

Texas
• The Backyard Grill (Houston)
• Blue Baker (College Station)
• Café Momentum (Dallas)
• San Angelo Restaurant Association (San Angelo)
• Whataburger (San Antonio)

Utah
• Even Stevens (Salt Lake City)

Washington
• Hop Jacks “A Neighborhood Gathering Place” (Auburn)
• Mill Creek Pub (Battle Ground)
• MOD Pizza (Bellevue)

Wisconsin
• Burger King (Eau Claire)
• Cousins Subs (Menomonee Falls)
• Saz’s State House (Milwaukee)
• Wild Tomato Wood-Fired Pizza and Grille (Fish Creek)
• Wisconsin Hospitality Group (Waukesha)
TRAVELERS’ CHOICE AWARDS

115.1 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.

115.2 Awards 2017

1. Alina (Chicago, IL)
2. Victoria & Albert’s (Orlando, FL)
3. Per Se (New York, NY)
4. Halls Chophouse (Charleston, SC)
5. Bouley (New York, NY)
6. Charleston Grill (Charleston, SC)
7. Daniel (New York, NY)
8. Restaurant Gary Danko (San Francisco, CA)
9. The French Laundry (Yountville, CA)
10. Mama’s Fish House (Paia, HI)
11. Auberge du Soleil Restaurant (Rutherford, CA)
12. Chef and the Farmer (Kinston, NC)
13. Uchi (Austin, TX)
15. Lahaina Grill (Lahaina, HI)
16. Circa 1886 Restaurant (Charleston, SC)
17. Geronimo (Santa Fe, NM)
18. GW Fins (San Francisco, CA)
19. Upperline Restaurant (New Orleans, LA)
20. Le Bernardin (New York, NY)
21. Bavette’s Bar and Boeuf (Chicago, IL)
22. The Bazaar by Jose Andrés (Miami Beach, FL)
23. Fig (Charleston, SC)
24. Canlis Restaurant (Seattle, WA)
25. Rasika (Washington, DC)

115.3 Market Resources
TripAdvisor, 400 1st Avenue, Needham, MA 02494. (781) 800-5000. (www.tripadvisor.com)
TOP COCKTAILS: RESTAURANT HOSPITALITY

116.1 Overview

*Restaurant Hospitality* annually recognizes the Best Cocktails in America. This chapter presents the 2016 selections.

“Not only has America’s love for cocktails grown tremendously in recent years, so has the skill of those who prepare them.”

*Restaurant Hospitality*, 11/16

116.2 Best Cocktails in America

**Coco Lada**
- Restaurant: The Lone Wolf Bar (Kansas City, MO)
- Category: Dessert
- Key Ingredients: Malibu Rum, Godiva Chocolate Liqueur, Baileys Irish Cream, coconut milk, pineapple juice, simple syrup, chocolate syrup and a chocolate bar garnish

**Compass Points**
- Restaurant: Mutiny Pirate Bar & Island Grille (Glen Burnie, MD)
- Category: Rum, Pisco and Cachaça
- Key Ingredients: Rhum J.M. V.S.O.P., lemon grass-turbinado-white balsamic shrub, The Bitter Truth Creole Bitters and egg white

**Don Fabrizio**
- Restaurant: Il Gattopardo (New York, NY)
- Category: Agave (Tequila, Mezcal, Sotol, etc.)
- Key Ingredients: Añejo tequila, Amaro Segesta di Sicilia, a pepperoncino infusion
and Sicilian blood oranges, garnished with blood orange peel and served in a glass lined with black volcanic Sicilian sea salt.

Dr. No
- Restaurant: Salt House (San Francisco, CA)
- Category: Gin
- Key Ingredients: Hendrick’s Gin, yuzu, amontillado sherry, cucumber, furikake rim and nori strip garnish

Drunken Panda
- Restaurant: Culinary Dropout (Phoenix, AZ)
- Category: Low-alcohol
- Key Ingredients: Cucumber sake, white tea syrup, calamansi and Lucky Buddha lager

Ginger Rye Grilled Peach Old Fashioned
- Restaurant: Fish City Grill (Dallas, TX)
- Category: Whiskey
- Key Ingredients: Reilly’s Rock & Rye Ginger, St-Germain Elderflower Liqueur, Angostura bitters, grilled peaches, thyme, simple syrup

Notes from Granny
- Restaurant: Magnolia House (Pasadena, CA)
- Category: Gin
- Key Ingredients: London Dry Gin, Drunken Crane chicory and vanilla, fresh lemon juice, Granny Smith syrup, and add a splash of soda water

Nudge of the River
- Restaurant: Currents at the Riverhouse on the Deschutes (Bend, OR)
- Category: Dessert
- Key Ingredients: Cold-pressed Stumptown coffee, American Pot Still Brandy, Kahlua and Godiva dark chocolate

Pistols at Dawn
- Restaurant: Culinary Dropout (Phoenix, AZ)
- Category: Whiskey
- Key Ingredients: Bourbon, Ancho Reyes, ginger, agave syrup, splash of Cabernet Sauvignon

Spiced Pear and Raspberry Mojito
- Restaurant: Old Fountain Tavern (Dacula, GA)
- Category: Rum, Pisco and Cachaça
- Key Ingredients: Pyrat Spiced Rum, Chambord, pear, mint, agave nectar, lime juice, soda and raspberries
**Sweet Flower of Mine**
- Restaurant: Formento’s (Chicago, IL)
- Category: Low-Alcohol
- Key Ingredients: Fiorente Elderflower, Peychaud’s Aperitivo, Carpano Dry Vermouth, Prosecco, and lemon

**The California Mule**
- Restaurant: Olamendi’s Mexican Restaurant (Dana Point, CA)
- Category: Agave (Tequila, Mezcal, Sotol, etc.)
- Key Ingredients: Ginger-infused Olamendi’s Organic Tequila Plata, Olamendi’s Cerveza California Lager and lime, served in a salt-rimmed glass and garnished with a blackberry and sprig of thyme.

**Titanic**
- Restaurant: Trummer’s on Main (Clifton, VA)
- Category: Vodka
- Key Ingredients: Ciroc vodka, elderflower syrup, sparkling wine, muddled green grapes and Champagne sorbet

**Uva**
- Restaurant: Nora’s Italian Cuisine (Las Vegas, NV)
- Category: Vodka
- Key Ingredients: Absolut Citron vodka infused with thyme and lemon grass, Carpano Bianco vermouth, Tintero Moscato d’Asti, coriander seed, green grapes, lemon juice, lemon bitters and egg white

### 116.3 Market Resources
Details for the Best Cocktails in America and runner-up selections are available at www.restaurant-hospitality.com/best-cocktails.
117

TOP RESTAURANTS: GAYOT

117.1 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 2016 selections.

117.2 Selections 2016
- Addison (San Diego, CA)
- Alinea (Chicago, IL)
- Atelier Crenn (San Francisco, CA)
- Aubergine (Carmel, CA)
- Blue Hill at Stone Barns (Tarrytown, NY)
- Brushstroke (New York, NY)
- Chef Mavro (Honolulu, HI)
- Daniel (New York, NY)
- Eleven Madison Park (New York, NY)
- Epic Restaurant (Columbus, GA):
- Frasca Food and Wine (Denver, CO)
- Grace (Chicago, IL)
- Jean-Georges (New York, NY)
- Joël Robuchon (Las Vegas, NV)
- L'Espalier (Boston, MA)
- LaToque (Napa, CA)
- Le Bernardin (New York, NY)
- Le Cirque (New York, NY)
- Manresa (Los Gatos, CA)
- 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)
• SAAM at the Baxaar by José Andrés (Los Angeles, CA)
• Saison (San Francisco, CA)
• Studio (Long Beach, CA)
• The French Laundry (Yountville, CA)
• The Inn at Little Washington (Washington, VA)
• The Restaurant at Meadowood (St. Helena, CA)
• Tru (Chicago, IL)
• Twist by Pierre Gagnaire (Las Vegas, NV)
• Urasawav (Los Angeles, CA)
• Vetri (Philadelphia, PA)
• Vie (Western Springs, IL)

117.3 Market Resources
Gayot, 4311 Wilshire Boulevard, Suite 405, Los Angeles, CA 90010. (323) 965-3529. (www.guyot.com)
TOP RESTAURANTS: THE DAILY MEAL

118.1 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.

118.2 Top Selections 2017

1. Alinea (Chicago, IL)
2. Daniel (New York, NY)
3. Le Bernardin (New York, NY)
4. Eleven Madison Park (New York, NY)
5. Next (Chicago, IL)
6. Providence (Los Angeles, CA)
7. The French Laundry (Yountville, CA)
8. Le Pigeon (Portland, OR)
9. Joël Robuchon (Las Vegas, NV)
10. Gramercy Tavern (New York, NY)
11. Blue Hill at Stone Barns (Pocantico Hills, NY)
12. Quince (San Francisco, CA)
13. Guy Savoy (Las Vegas, NV)
14. The Barn at Blackberry Farm (Walland, TN)
15. Del Posto (New York, NY)
16. Commander’s Palace (New Orleans, LA)
17. Per Se (New York, NY)
18. Manresa (Los Gatos, CA)
19. Jean Georges (New York, NY)
20. Spago (Beverly Hills, CA)
21. Gabriel Kreuther (New York, NY)
22. The Restaurant at Meadowood (St. Helena, CA)
23. Blackbird (Chicago, IL)
24. Cosme (New York, NY)
25. Husk (Charleston, SC)
26. FIG (Charleston, SC)
27. Masa (New York, NY)
28. NoMad (New York, NY)
29. Osteria Mozza (Los Angeles, CA)
30. Herbsaint (New Orleans, LA)
31. Republique (Los Angeles, CA)
32. Nobu (New York, NY)
33. Minibar (Washington, DC)
34. Momofuku Ko (New York, NY)
35. Chez Panisse (Berkeley, CA)
36. The Modern (New York, NY)
37. Coi (San Francisco, CA)
38. Peche (New Orleans, LA)
39. Spiaggia (Chicago, IL)
40. Avec (Chicago, IL)
41. Le Coucou (New York, NY)
42. Bestia (Los Angeles, CA)
43. Zahav (Philadelphia, PA)
44. Zuni Cafe (San Francisco, CA)
45. August (New Orleans, LA)
46. Galatoire’s (New Orleans, LA)
47. Bacchanalia (Atlanta, GA)
48. é by José Andrés (Las Vegas, NV)
49. Shaya (New Orleans, LA)
50. Café Boulud (New York, NY)
51. Hominy Grill (Charleston, SC)
52. Inn at Little Washington (Washington, VA)
53. Restaurant Gary Danko (San Francisco, CA)
54. O Ya (Boston, MA)
55. Peter Luger (Brooklyn, NY)
56. Underbelly (Houston, TX)
57. Animal (Los Angeles, CA)
58. Barley Swine (Austin, TX)
59. Valentino (Santa Monica, CA)
60. Beast (Portland, OR)
61. Benu (San Francisco, CA)
62. Gotham Bar & Grill (New York, NY)
63. Highlands Bar & Grill (Birmingham, AL)
64. Aureole (New York, NY)
65. Girl & the Goat (Chicago, IL)
66. RDG + Bar Annie (Houston, TX)
67. Rose’s Luxury (Washington, DC)
68. Bazaar (Los Angeles, CA)
69. Nopa (San Francisco, CA)
70. Frasca Food & Wine (Boulder, CO)
71. Oyster Club (Mystic, CT)
72. Fearing’s (Dallas, TX)
73. Babbo (New York, NY)
74. McCrady’s (Charleston, SC)
75. Canlis (Seattle, WA)
76. Le Coq Rico (New York, NY)
77. Trois Mec (Los Angeles, CA)
78. Estela (New York, NY)
79. Rustic Canyon (Santa Monica, CA)
80. Cala (San Francisco, CA)
81. Scampo (Boston, MA)
82. Norman’s (Orlando, FL)
83. Lucques (Los Angeles, CA)
84. Miller Union (Atlanta, GA)
85. Topolobampo (Chicago, IL)
86. FT33 (Dallas, TX)
87. Holeman & Finch (Atlanta, GA)
88. City Grocery (Oxford, MS)
89. Fat Rice (Chicago, IL)
90. Vetri (Philadelphia, PA)
91. Marea (New York, NY)
92. Bazaar Meat (Las Vegas, NV)
93. Camino (Oakland, CA)
94. Everest (Chicago, IL)
95. Chi Spacca (Los Angeles, CA)
96. ABC Kitchen (New York, NY)
97. Maude (Los Angeles, CA)
98. Melisse (Santa Monica, CA)
99. Roast (Detroit, MI)
100. Gjelina (Los Angeles, CA)
101. KYU (Miami, FL)

118.3 Market Resources
The Daily Meal, 156 5th Avenue, Suite 400, New York, NY 10010.
(www.thedailymeal.com)
119

TOP NEIGHBORHOOD GEM
RESTAURANTS: OPENTABLE

119.1 Overview
Based on more than five million reviews of nearly 19,000 restaurants, OpenTable (www.opentable.com) designated 100 restaurants across the U.S. as Neighborhood Gem Restaurants.

_________________________________________________________________

“Eating local isn’t just about ingredients; it’s also about the restaurants in your community that make you feel special time and again.”

OpenTable, 7/17

119.2 Designations 2017
• Agave (Atlanta, GA)
• Apartment 13 (New York, NY)
• Bar Lucca (Conshohocken, PA)
• Battuto Italian Kitchen (Dallas, TX)
• Benissimo Ristorante and Bar (Corte Madera, CA)
• Bethany’s Table (Portland, OR)
• Bistro de la Gare (South Pasadena, CA)
• Bistro Grace (Cincinnati, OH)
• Bistro Piattini (Albuquerque, NM)
• Blue Marlin (Bradenton Beach, FL)
• Blue Ribbon Rustic Kitchen (San Diego, CA)
• BO-beau kitchen + garden (La Mesa, CA)
• Bottega (Baltimore, MD)
• Buck’s Fishing & Camping (Washington, DC)
• Bustan (New York, NY)
• Cafe Nell (Portland, OR)
• Casa Bella Trattoria (Haddonfield, NJ)
Casper Fry (Spokane, WA)
Chicago Joe’s (Las Vegas, NV)
Common Quarter (Marietta, GA)
Croce’s Park West (San Diego, CA)
Crossings (South Pasadena, CA)
Crux Cafe (Audubon, NJ)
District Kitchen and Cocktails (Austin, TX)
Eastland Cafe (Nashville, TN)
El Sitio Steak and Seafood (Collingswood, NJ)
Favaloro’s Big Night Bistro (Pacific Grove, CA)
Finca (Salt Lake City, UT)
Fork! (Cornelius, NC)
Gemma (Dallas, TX)
Glen Ellen Star (Glen Ellen, CA)
Glyndon Grill (Glyndon, MD)
Grange (Westwood, NJ)
Gusto (San Carlos, CA)
Hammocks Trading Company (Sandy Springs, GA)
Heyday (Minneapolis, MN)
Il Segreto (Bel Air, CA)
Illos Noche - Park Rd. (Charlotte, NC)
Ink & Elm (Atlanta, GA)
Kinfolk (San Francisco, CA)
Kitchen on George (Mobile, AL)
L’Oceano Ristorante (Collingswood, NJ)
Laurel (Philadelphia, PA)
Little Nonna’s (Philadelphia, PA)
Longitud315 (Highwood, IL)
Lou’s Village (San Jose, CA)
Lucia’s Restaurant and Wine Bar (Minneapolis, MN)
Luna Blu (Tiburon, CA)
M’Tucci’s Kitchina (Albuquerque, NM)
Maximiliano (Los Angeles, CA)
mkt. (Seattle, WA)
Nico (San Francisco, CA)
Nico’s Taco and Tequila Bar (Minneapolis, MN)
Oda House (New York, NY)
Osmanthus (Oakland, CA)
Osteria Mattone (Roswell, GA)
Paris Bistro - Chestnut Hill (Philadelphia, PA)
Pascal and Sabine (Asbury Park, NJ)
Picasso on Paseo (Oklahoma City, OK)
Po Le Cucina (Spring House, PA)
Pomodoro Rosso (New York, NY)
• Red Cow (Seattle, WA)
• Red Gravy (Brooklyn, NY)
• Reunion Kitchen + Drink (Anaheim Hills, CA)
• Roma Ristorante (Carmel, IN)
• Rossetti Restaurant of Lynn (Lynn, MA)
• Sarma (Somerville, MA)
• Satsuma (Wilmington, DE)
• Sociale (Brooklyn, NY)
• South + York (Winter Springs, FL)
• South End (Venice, CA)
• Stone’s Public House (Ashland, MA)
• Stones Throw (San Francisco, CA)
• Stonewood Grill & Tavern (Orlando, FL)
• Stonewood Grill & Tavern (Wellington, FL)
• T.W. Food (Cambridge, MA)
• Tavola (New York, NY)
• Taylor’s Kitchen (Sacramento, CA)
• Thally (Washington, DC)
• The Back Room Steakhouse (Apopka, FL)
• The Black Sheep Bistro (Old Town Spring, TX)
• The Cecil (New York, NY)
• The Chef’s Table (Rocklin, CA)
• The Clam (New York, NY)
• The Good King Tavern (Philadelphia, PA)
• The Granary (Mount Pleasant, SC)
• The Grilled Oyster Company (Potomac, MD)
• The Obstinate Daughter (Sullivans Island, SC)
• The Pastaria (Los Gatos, CA)
• the plimoth (Denver, CO)
• The Red Feather (Cincinnati, OH)
• The Writing Room (New York, NY)
• The Yellow Porch (Nashville, TN)
• Thomas Restaurant (Kansas City, MO)
• Tortino (Washington, DC)
• Trabocco (Alameda, CA)
• Unite Urban Grill (Chicago, IL)
• V’s Restaurant (Malibu, CA)
• Vincitori Fine Italian Cuisine (Westmont, IL)
• Wild Iris (Brentwood, TN)

119.3 Market Resources
OpenTable, 1 Montgomery Street, Suite 700, San Francisco, CA 94104.
(www.opentable.com)
TOP BEER BARS: DRAFT MAGAZINE

120.1 Award Winners 2017

*Draft* designates America’s 100 Best Beer Bars annually. The following are the 2017 designations:

- 7 Monks (Traverse City, MI)
- Aces and Ales – Tenaya (Las Vegas, NV)
- Armsby Abbey (Worcester, MA)
- Bailey’s Taproom (Portland, OR)
- Banger’s Sausage House & Beer Garden (Austin, TX)
- Barrel Republic (San Diego, CA)
- 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)
- Blind Lady Ale House (San Diego, CA)
- Blind Tiger Ale House (New York, NY)
- Brick Store Pub (Decatur, GA)
- Bridge (St. Louis, MO)
- Brouwer’s Cafe (Seattle, WA)
- Brouwerij Lane (Brooklyn, NY)
- Burnhearts (Milwaukee, WI)
- Busy Bee Cafe (Raleigh, NC)
- Churchill’s Pub & Grille (San Marcos, CA)
- Churchkey (Washington, DC)
- City Beer Store (San Francisco, CA)
- Closed for Business (Charleston, SC)
- Clubhouse BFD (Rochester Hills, MI)
- Covenhoven (Brooklyn, NY)
- 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)
• El Bait Shop (Des Moines, IA)
• Falling Rock Tap House (Denver, CO)
• Fountain Porter (Philadelphia, PA)
• Fountainhead (Chicago, IL)
• Freshcraft (Denver, CO)
• Grey Lodge Pub (Philadelphia, PA)
• Hamilton's Tavern (San Diego, CA)
• Heorot (Muncie, IN)
• Holy Grale (Louisville, KY)
• Hopleaf (Chicago, IL)
• Hops + Crafts (Nashville, TN)
• Khyber Pass (Philadelphia, PA)
• Kickbacks Gastropub/Goozlepipe & Guttyworks (Jacksonville, FL)
• Krug Park (Omaha, NE)
• Local Option (Chicago, IL)
• Lord Hobo (Cambridge, MA)
• Mahogany Bar (Hattiesburg, MS)
• Map Room (Chicago, IL)
• Maria’s Packaged Goods & Community Bar (Chicago, IL)
• Max’s Taphouse (Baltimore, MD)
• Memphis Taproom (Philadelphia, PA)
• Mikkeller Bar (San Francisco, CA)
• Mohawk Bend (Los Angeles, CA)
• Monk’s Cafe (Philadelphia, PA)
• Mr. Beery’s (Sarasota, FL)
• N.W.I.P.A. (Portland, OR)
• Novare Res Bier Café (Portland, ME)
• Oak & Ore (Oklahoma City, OK)
• Palm Tavern (Milwaukee, WI)
• Petrol Station (Houston, TX)
• Proletariat (New York, NY)
• Redlight Redlight (Orlando, FL)
• Republic (Minneapolis, MN)
• Romans’ Pub (Milwaukee, WI)
• Salud (Charlotte, NC)
• Saraveza Bottle Shop & Pasty Tavern (Portland, OR)
• Sergio’s World Beers (Louisville, KY)
• Sheffield’s (Chicago, Illinois)
• Standard Tap (Philadelphia, PA)
• Strangelove’s (Philadelphia, PA)
• Strangeways (Dallas, TX)
• Stumbling Monk (Seattle, WA)
• Sugar Maple (Milwaukee, WI)
- Tap & Bottle (Tucson, AZ)
- Tap and Handle (Fort Collins, CO)
- The Avenue Pub (New Orleans, LA)
- The Birch (Norfolk, VA)
- The Happy Gnome (Saint Paul, MN)
- The Hay Merchant (Houston, TX)
- The Koelschip (Indianapolis, IN)
- The J. Clyde (Birmingham, AL)
- The Jeffrey (New York, NY)
- The Mayor of Old Town (Fort Collins, CO)
- The Mitten Bar (Ludington, MI)
- The Pine Box (Seattle, WA)
- The Porter Beer Bar (Atlanta, GA)
- The Publick House (Brookline, MA)
- The Surly Goat (West Hollywood, CA)
- The Trappist (Oakland, CA)
- Three Penny Taproom (Montpelier, VT)
- Tiger!Tiger! (North Park, CA)
- Top Hops Beer Shop (New York, NY)
- TØRST (Brooklyn, NY)
- Tria Taproom (Philadelphia, PA)
- Victory Bar (Portland, OR)
- WHYM Craft Beer Café (Portsmouth, NH)
121

TOP 101 PIZZERIAS: THE DAILY MEAL

121.1 Award Winners 2017

The Daily Meal (www.thedailymeal.com) ranked the best pizzas in America in 2017 as follows:

1. Di Fara (Brooklyn, NY)
2. John’s of Bleecker Street (New York, NY)
3. Frank Pepe Pizzeria Napoletana (New Haven, CT)
4. Roberta’s (Brooklyn, NY)
5. Totonno’s (Brooklyn, NY)
6. Motorino (New York, NY)
7. Sally’s Apizza (New Haven, CT)
8. Pizzeria Bianco (Phoenix, AZ)
9. Lucali (Brooklyn, NY)
10. Rubirosa Ristorante (New York, NY)
11. Louie and Ernie’s (Bronx, NY)
12. Pizzeria Beddia (Philadelphia, PA)
13. Pizzeria Mozza (Los Angeles, CA)
14. Joe’s Pizza (New York, NY)
15. Modern Apizza (New Haven, CT)
16. Pizzeria Vetri (Philadelphia, PA)
17. Grimaldi’s (Brooklyn, NY)
18. Kesté Pizza & Vino (New York, NY)
19. Buddy’s Pizza (Detroit, MI)
20. Apizza Scholls (Portland, OR)
21. Paulie Gee’s (Brooklyn, NY)
22. Patsy’s (New York, NY)
23. Prince St. Pizza (New York, NY)
24. Pequod’s (Chicago, IL)
25. Santarpio’s (Boston, MA)
26. New Park Pizza (Howard Beach, NY)
27. Varasano’s Pizzeria (Atlanta, GA)
28. Coalfire Pizza (Chicago, IL)
29. Speedy Romeo (Brooklyn, NY)
30. Denino’s (Staten Island, NY)
31. Al Forno (Providence, RI)
32. Lombardi’s (New York, NY)
33. Gino’s East (Chicago, IL)
34. Piece (Chicago, IL)
35. Sotto (Los Angeles, CA)
36. Flour + Water (San Francisco, CA)
37. Una Pizza Napoletana (San Francisco, CA)
38. Regina Pizzeria (Boston, MA)
39. Colony Pizza (Stamford, CT)
40. Emily (Brooklyn, NY)
41. Nick’s Pizza (Forest Hills, NY)
42. Antico Pizza Napoletana (Atlanta, GA)
43. Giordano’s Pizza (Chicago, IL)
44. Pizzeria Delfina (San Francisco, CA)
45. Tony’s Pizza Napoletana (San Francisco, CA)
46. Metro Pizza (Las Vegas, NV)
47. Ernie’s Pizzeria (New Haven, CT)
48. Mike’s Apizza & Restaurant (West Haven, CT)
49. Roseland Apizza (Derby, CT)
50. Santillo’s Brick Oven Pizza (Elizabeth, NJ)
51. Star Tavern Pizzeria (Orange, NJ)
52. Amore Pizzeria (Flushing, NY)
53. 2Amys (Washington, DC)
54. Pizano’s (Chicago, IL)
55. Vito & Nick’s (Chicago, IL)
56. Zaffiro’s Pizza (Milwaukee, WI)
57. Ken’s Artisan Pizza (Portland, OR)
58. Gjelina (Los Angeles, CA)
59. Pizza Rock (Las Vegas, NV)
60. Bru Room at Bar (New Haven, CT)
61. Zuppardi’s (West Haven, CT)
62. Delorenzo’s Tomato Pies (Robbinsville, NJ)
63. Williamsburg Pizza (Brooklyn, NY)
64. Umberto’s Pizzeria & Restaurant (New Hyde Park, NY)
65. Santucci’s Square Pizza (Philadelphia, PA)
66. Osteria (Philadelphia, PA)
67. Lou Malnati’s Pizzeria (Chicago, IL)
68. Pizza Domenica (New Orleans, LA)
69. Caserta Pizzeria (Providence, RI)
70. Pizzeria Paradiso (Washington, DC)
71. Scuola Vecchia Pizza E Vino (Delray Beach, FL)
72. Pizza Delicious (New Orleans, LA)
73. The Backspace (Austin, TX)
74. Via 313 (Austin, TX)
75. Nostrana (Portland, OR)
76. Capo’s (San Francisco, CA)
<table>
<thead>
<tr>
<th></th>
<th>Restaurant Name</th>
<th>City, State</th>
</tr>
</thead>
<tbody>
<tr>
<td>77</td>
<td>Pizzaiolo</td>
<td>Oakland, CA</td>
</tr>
<tr>
<td>78</td>
<td>The Cheese Board</td>
<td>Berkeley, CA</td>
</tr>
<tr>
<td>79</td>
<td>Galleria Umberto</td>
<td>Boston, MA</td>
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<tr>
<td>80</td>
<td>Papa’s Tomato Pies</td>
<td>Robbinsville, NJ</td>
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<tr>
<td>81</td>
<td>J&amp;V Pizzeria</td>
<td>Brooklyn, NY</td>
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<tr>
<td>82</td>
<td>Gino’s of Long Beach</td>
<td>Long Beach, NY</td>
</tr>
<tr>
<td>83</td>
<td>King Umberto Ristorante &amp; Pizzeria</td>
<td>Elmont, NY</td>
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<tr>
<td>84</td>
<td>Pizza Brain</td>
<td>Philadelphia, PA</td>
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<tr>
<td>85</td>
<td>Emmy Squared</td>
<td>Brooklyn, NY</td>
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<tr>
<td>86</td>
<td>Micucci Grocery Store</td>
<td>Portland, ME</td>
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<tr>
<td>87</td>
<td>Pizzetteria Brunetti</td>
<td>Westhampton Beach, NY</td>
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<tr>
<td>88</td>
<td>Hog &amp; Hominy</td>
<td>Memphis, TN</td>
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<tr>
<td>89</td>
<td>Fat Lorenzo’s</td>
<td>Minneapolis, MN</td>
</tr>
<tr>
<td>90</td>
<td>Providence Coal Fired Pizza</td>
<td>Providence, RI</td>
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<tr>
<td>91</td>
<td>Monza Pizza</td>
<td>Charleston, SC</td>
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<tr>
<td>92</td>
<td>Pizzeria Locale</td>
<td>Denver, CO</td>
</tr>
<tr>
<td>93</td>
<td>Harry’s Pizzeria</td>
<td>Miami, FL</td>
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<tr>
<td>94</td>
<td>Lovely’s Fifty Fifty</td>
<td>Portland, OR</td>
</tr>
<tr>
<td>95</td>
<td>Loui’s Pizza</td>
<td>Hazel Park, MI</td>
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<tr>
<td>96</td>
<td>O4W Pizza</td>
<td>Duluth, GA</td>
</tr>
<tr>
<td>97</td>
<td>EVO</td>
<td>Charleston, SC</td>
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<tr>
<td>98</td>
<td>L&amp;B Spumoni Gardens</td>
<td>Brooklyn, NY</td>
</tr>
<tr>
<td>99</td>
<td>Reservoir Tavern</td>
<td>Boonton, NJ</td>
</tr>
<tr>
<td>100</td>
<td>Area Four</td>
<td>Cambridge, MA</td>
</tr>
<tr>
<td>101</td>
<td>Artichoke Basille’s Pizza</td>
<td>New York, NY</td>
</tr>
</tbody>
</table>
WINE SPECTATOR GRAND AWARD

122.1 Overview
Wine Spectator gives awards of three levels annually for outstanding restaurant wine lists: the Award of Excellence, The Best of Award of Excellence, and the Grand Award. In 2017, there were more than 3,600 recipients of these awards.

122.2 Award Recipients 2017
U.S. Grand Award recipients for 2017 are as follows:

Arizona
• Anthony’s in the Catalinas (Tucson)

California
• Acquerello (San Francisco)
• Addison (San Diego)
• Marinus Restaurant at Bernardus Lodge (Carmel Valley)
• Patina (Los Angeles)
• Restaurant 301 at Hotel Carter (Eureka)
• Restaurant Gary Danko (San Francisco)
• RN74 (San Francisco)
• Sierra Mar (Big Sur)
• Spago Beverly Hills (Beverly Hills)
• The French Laundry (Yountville)
• The Village Pub (Woodside)
• The WineSellar & Brasserie (San Diego)
• Valentino (Santa Monica)

Colorado
• Element 47 (Aspen)
• Flagstaff House Restaurant (Boulder)

Florida
• Bern’s Steak House (Tampa)
• HMF (Palm Beach)
Illinois
• Tru (Chicago)

Louisiana
• Commander’s Palace (New Orleans)
• Emeril’s New Orleans (New Orleans)

Massachusetts
• Blantyre (Lenox)
• Left Bank at Stonehedge Inn (Tyngsboro)
• Topper’s at the Wauwinet (Nantucket)

Nevada
• Aureole Las Vegas at Mandalay Bay (Las Vegas)
• Delmonico Steakhouse at The Venetian (Las Vegas)
• Joël Robuchon Restaurant at MGM Grand (Las Vegas)
• Picasso at Bellagio (Las Vegas)
• Restaurant Guy Savoy (Las Vegas)

New Jersey
• Restaurant Latour at Crystal Springs Resort (Hardyston)
• The Pluckemin Inn (Bedminster)

New Mexico
• Billy Crews Dining Room (Santa Teresa)

New York
• “21” Club (New York)
• A Voce Columbus (New York)
• Crabtree’s Kittle House (Chappaqua)
• Daniel (New York)
• Del Posto (New York)
• Eleven Madison Park (New York)
• Per Se (New York)
• The American Hotel (Long Island)
• Tribeca Grill (New York)
• Veritas (New York)

North Carolina
• The Angus Barn (Raleigh)

Tennessee
• Blackberry Farm (Walland)
Texas
• Pappas Bros. Steakhouse (Dallas)
• Pappas Bros. Steakhouse (Houston)

Virginia
• The Inn at Little Washington (Washington)

Washington
• Canlis Restaurant (Seattle)
• Wild Ginger (Seattle)
WORLD’S BEST RESTAURANTS:  
RESTAURANT MAGAZINE

123.1 Best Restaurants

Among various lists of award-winning fine-dining restaurants, The World’s 50 Best Restaurants, published annually by British magazine Restaurant, is the most recognized. The ranking is based on a poll of international chefs, restaurateurs, gourmands, and restaurant critics.

123.2 Award Winners For 2017

Restaurant’s The World’s 50 Best Restaurants list for 2017 is as follows:
1. Eleven Madison Park (New York, NY, United States)
2. Osteria Francescana (Modena, Italy)
3. El Celler de Can Roca (Girona, Spain)
4. Mirazur (Menton, France)
5. Central (Lima, Peru)
6. Asador Etxebarri (Biscay, Spain)
7. Gaggan (Bangkok, Thailand)
8. Mado (Lima, Peru)
9. Mugaritz (San Sebastian, Spain)
10. Steirereck (Vienna, Austria)
11. Blue Hill at Stone Barns (Pocantico Hills, NY, United States)
12. Arpege (Paris, France)
13. Alain Ducasse Au Plaza Athenee (Paris, France)
14. Restaurant Andre (Singapore)
15. Piazza Duomo (Alba, Italy)
16. D.O.M. (Sao Paulo, Brazil)
17. Le Bernardin (New York, NY, United States)
18. Narisawa (Tokyo, Japan)
19. Geranium (Copenhagen, Denmark)
20. Pujol (Mexico City, Mexico)
21. Alinea (Chicago, IL, United States)
22. Quintonil (Mexico City, Mexico)
23. White Rabbit (Moscow, Russia)
24. Amber (Hong Kong)
25. Tickets (Barcelona, Spain)
26. Clove Club (London, United Kingdom)
27. The Ledbury (London, United Kingdom)
28. Nahm (Bangkok, Thailand)
29. Le Calandre (Rubano, Italy)
30. Arzak (San Sebastian, Spain)
31. Alleno Paris au Pavillon Ledoyen (Paris, France)
32. Attica (Melbourne, Australia)
33. Astrid (Lima, Peru)
34. De Librije (Zwolle, Netherlands)
35. Septime (Paris, France)
36. Dinner by Heston Blumenthal (London, United Kingdom)
37. Saison (San Francisco, CA, United States)
38. Azurmendi (Larrabetzu, Spain)
39. Relae (Copenhagen, Denmark)
40. Cosme (New York, NY, United States)
41. Ultraviolet by Paul Pairet (Shanghai, China)
42. Borago (Santiago, Chile)
43. Reale (Castel di Sangro, Italy)
44. Brae (Birregurra, Australia)
45. Den (Tokyo, Japan)
46. L’Astrance (Paris, France)
47. Vendome (Bergisch Gladbach, Germany)
48. Restaurant Tim Raue (Berlin, Germany)
49. Tegui (Buenos Aires, Argentina)
50. Hof Van Cleve (Kruishoutem, Belgium)
124

ZAGAT SELECTIONS

124.1 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.

124.2 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: LoKal Burgers
- New Orleans: Company Burger
- New York, NY: Burger Joint
- Philadelphia, PA: Sketch
- Portland, OR: Killer Burger
- San Diego, CA: Hodad’s Burgers
- San Francisco, CA: 900 Grayson (Berkley)
- Seattle, WA: Broiler Bay (Bellevue)

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 Ya
• 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

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019
• 560 •
• 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 Fast-Casual Restaurants
• Atlanta, GA: Della’s Chicken Sausage Stand
• Austin, TX: Hopdoddy Burger Bar
• Boston, MA: Roxy’s Gourmet Grilled Cheese
• Chicago, IL: Tortas Frontera
• Dallas, TX: Torchy’s Tacos
• Denver, CO: Tocabe American Indian Eatery
• Houston, TX: Torchy’s Tacos
• Los Angeles, CA: Dog Haus
• Miami, FL: Pincho Factory
• New York, NY: Num Pang
• Philadelphia, PA: Paesano’s
• San Diego, CA: Carnita’s Snack Shack
• San Francisco, CA: LYFE Kitchen
• Seattle, WA: Zippy’s
• Washington, DC: Amsterdam Falafelshop

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: Cheén 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)
124.3 Market Resources
Zagat Survey, 76 9th Avenue, 4th Floor, New York, NY 10011. (212) 977-6000.
(www.zagat.com)
PART XIII: FOOD & BEVERAGE HOLIDAYS
125

NATIONAL FOOD & BEVERAGE HOLIDAYS

125.1  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.

“Trends to report on, chefs to interview, food to taste, drinks to drink. If I reported on every food day, I wouldn’t have time to do anything else.”

Bret Thorn, Senior Food Editor
Nation’s Restaurant News, 11/14/16

The following are lists of national food & beverage designations recognized in the United States.

125.2  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 25 National Chocolate Covered Peanuts Day
• February 26: National Pistachio Day
• February 27: National Kahlua Day
• February 28: National Chocolate Souffle Day

March
• March 1: National Peanut Butter Lover’s Day
• March 2: National Banana Cream Pie Day
• March 3: National Mulled Wine Day
• March 4: National Pound Cake Day
• March 5: National Cheese Doodle Day
• March 6: National Frozen Food Day
• March 7: National Crown Roast of Pork Day
• March 8: National Peanut Cluster Day
• March 9: National Crabmeat Day
• March 10: National Blueberry Popover Day
• March 11: National Oatmeal-Nut Waffle Day
• March 12: National Baked Scallops Day
• March 13: National Coconut Torte Day
• March 14: National Potato Chip Day
• March 15: National Pears Helene Day
• March 16: National Artichoke Hearts Day
• March 17: National Green Beer Day
• March 18: National Lacy Oatmeal Cookie Day
• March 19: National Chocolate Carmel Day
• March 20: National Ravioli Day
• March 21: National French Bread Day
• March 22: National Bavarian Crepes Day
• March 23: National Chip and Dip Day
• March 24: National Chocolate Covered Raisins Day
• March 25: National Lobster Newburg Day
• March 26: National Nougat Day
• March 27: National Spanish Paella Day
• March 28: National Black Forest Cake Day
• March 28: Something On A Stick Day
• March 29: National Lemon Chiffon Cake Day
• March 30: Turkey Neck Soup Day
• March 31: National Clams on the Half Shell Day
• March 31: Oranges and Lemons Day
• March 31: Tater Day

April
• 1st Monday: Sweet Potato Day
• Good Friday: National Hot Cross Bun Day
• Easter: National Baked Ham with Pineapple Day
• April 1: National Sourdough Bread Day
• April 2: National Peanut Butter & Jelly Day
• April 3: National Chocolate Moose Day
• April 4: Chocolate Milk Powder Day
• April 4: National Cordon Bleu Day
• April 5: National Caramel Day & Raisin and Spice Bar Day
• April 6: Fresh Tomato Day
• April 6: National Caramel Popcorn Day
• April 7: National Coffee Cake Day
• April 8: Milk in Glass Bottles Day
• April 8: National Empanada Day
• April 9: National Chinese Almond Cookie Day
• April 10: Cinnamon Crescent Day
• April 11: National Cheese Fondue Day
• April 12: National Licorice Day
• April 12: Grilled Cheese Sandwich Day
• April 13: National Peach Cobbler Day
• April 14: National Pecan Day
• April 15: Glazed Spiral Ham Day
• April 16: National Eggs Benedict Day
• April 16: Day of the Mushroom
• April 17: National Cheese Ball Day
• April 18: National Animal Cracker Day
• April 19: Garlic Day
• April 19: Amaretto Day
• April 20: Pineapple Upside Down Cake Day
• April 20: Lima Bean Respect Day
• April 21: Chocolate-Covered Cashew Truffle Day
• April 22: Jelly Bean Day
• April 23: Picnic Day
April
• 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

“Do French fries actually need a day so that we remember to eat them? (In case you do, it’s July 13.) It seems like every day is French Fry Day in America.”

Nation’s Restaurant News, 11/14/16

• 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

“Maybe, just as some people need a reason like Mother’s Day to tell their mothers that they love them, they need National Caviar Day (July 18) to remember to say it with fish roe.”

Nation’s Restaurant News, 11/14/16

• 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 Vichysoise 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 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
“These proliferating food days are sometimes silently and, I suspect, ineffective gambits, but, yes, in the hands of the right marketer, they can also be smart strategies that pique patron interest and drive traffic.”

Nancy Kruse, President
Kruse Company
Nation’s Restaurant News, 11/14/16

125.3 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)

125.4 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
126

STATE FOODS

126.1 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:

126.2 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: Honeymcrisp 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

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019
• 587 •
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.culinaryinstitutemi.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](http://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](http://www.chefva.com))
- 2428 Almeda Avenue, Suite 106, Norfolk, VA 23513

**Florida International University** ([www.hospitality.fiu.edu](http://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](http://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](http://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](http://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](http://www.kendall.edu))
- School of Culinary Arts, 900 North Branch Street, Chicago, IL 60642

**L’École Culinaire** ([www.lecoleculinaire.com](http://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](http://www.chefs.edu))
- Atlanta: 1927 Lakeside Parkway, Tucker, GA 30084
- Austin: 3110 Esperanza Crossing, Suite 100, Austin, TX 78758
- Boston: 215 First Street, Cambridge, MA 02142
- Chicago: 361 West Chestnut, Chicago, IL 60610
- Dallas: 11830 Webb Chapel Road, Suite 1200, Dallas, TX 75234
- Las Vegas: 1451 Center Crossing Road, Las Vegas, NV 89144
- Los Angeles: 530 East Colorado Boulevard, Pasadena, CA 91101
• Miami: 3221 Enterprise Way, Miramar, FL 33025
• Minneapolis/Saint Paul: 1315 Mendota Heights Road, Mendota Heights, MN 55120
• Orlando: 8511 Commodity Circle, Suite 100, Orlando, FL 32819
• Portland: 600 SW 10th Avenue Suite 500, Portland, OR 97205
• Sacramento: 2450 Del Paso Road, Sacramento, CA 95834
• San Francisco: California Culinary Academy, 350 Rhode Island Street, San Francisco, CA 94103
• Scottsdale: 8100 East Camelback Road, Suite 1001, Scottsdale, AZ 85251
• Seattle: 360 Corporate Drive North, Tukwila, WA 98188
• St. Louis: 7898 Veterans Memorial Parkway, St. Peters, MO 63376

Lincoln Culinary Institute (www.lincolnedu.com/schools/lincoln-culinary-institute)
• 85 Sigourney Street, Hartford, CT 06105
• 8 Progress Drive, Shelton, CT 06484
• 9325 Snowden River Parkway, Columbia, MD 21046
• 2410 Metrocentre Boulevard, West Palm Beach, FL 33407

Miami Culinary Institute (www.miamidadeculinary.com)
• Wolfson Campus, 415 NE 2nd Avenue, Suite 9104, Miami, FL 33132

Michigan State University (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.neci.edu)
• 56 College Street, Montpelier, VT 05602

Nicholls State University (www.nicholls.edu/culinary)
• Chef John Folse Culinary Institute, 107 Gouaux Hall, P.O. Box 2099, Thibodaux, LA 70310

Oregon Coast Culinary Institute (www.occi.net)
• 1988 Newmark Avenue, Coos Bay, OR 97420

San Diego Culinary Institute (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, 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)

H2R Market Research, 4650 S. National Avenue, Springfield, MI 65810. (417) 877-7808. (www.h2rmarketresearch.com)

InMoment, 310 East 4500 South, Suite 450, Salt Lake City, UT 84107. (800) 530-4251. (www.inmoment.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)

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019
Richard K. Miller & Associates, 2413 Main Street, Suite 331, Miramar, FL 33025. (888) 928-7562. (www.rkma.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 Media Audit, 1400 Broadfield Boulevard, Suite 200, Houston, TX 77084. (713) 626-0333. (www.themediaaudit.com)

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

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

Zagat Survey LLC, 76 9th Avenue, 4th Floor, New York, NY 10011. (212) 977-6000. (www.zagat.com)

APPENDIX C

ASSOCIATIONS

American Beverage Association, 1101 Sixteenth Street NW, Washington, DC 20036. (202) 463-6732. (www.ameribev.org)

Beer Institute, 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, 40 Wall Street, 28th Floor, Suite 2863, New York, NY 10005. (646) 512-5860. (www.beverage-digest.com)

Beverage Dynamics, 17 High Street, 2nd Floor, Norwalk, CT 06851. (203) 855-8499. (www.beveragedynamics.com)

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.cheersonline.com)

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)

Food Management, c/o Penton Media, 1166 Avenue of the Americas, 10th Floor, New York, NY 10036. (212) 204-4200. (www.food-management.com)

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)

Restaurant Hospitality, c/o Penton Media, 1166 Avenue of the Americas, 10th Floor, New York, NY 10036. (212) 204-4200.

Restaurant Finance Monitor, 2808 Anthony Lane South, Minneapolis, MN 55418. (612) 767-3200. (www.restfinance.com)
APPENDIX E

STATE RESTAURANT ASSOCIATIONS

Alabama
• Alabama Restaurant & Hospitality Alliance, 61B Market Place, Montgomery, AL 36117. (334) 244-1320. (www.alabamarestaurants.com/index2.cfm)

Alaska
• Alaska Cabaret, Hotel, Restaurant 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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Chapter 2: Market Assessment


Chapter 3: Restaurant Census
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Chapter 4: Restaurant Franchises

Chapter 5: Restaurant Visits


Chapter 6: State-By-State Analysis

Chapter 7: Regional Trends

Chapter 8: National Dining Trends

Chapter 9: How Americans Eat


Chapter 11: Dining Out - Frequency

Chapter 13: Culinary Trends
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Chapter 14: Food & Dining Trends


Chapter 15: Market Trends

Chapter 16: Customer Profile


Chapter 17: Dining With Children


Chapter 18: Hispanic-American Customers


Chapter 19: Millenial Customers


Chapter 20: Generation Z Customers


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**Chapter 25: Mealparts**


RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2018-2019
• 607 •


**Chapter 26: Menu Items**


**Chapter 27: Snacks**


Chapter 31: Casual-Dining Restaurants


Chapter 32: Catering & Banquets

Chapter 34: College Campus Dining

Chapter 36: Convenience Store Foodservice


Chapter 37: Family-Dining Restaurants


Chapter 38: Fast-Casual Restaurants


Chapter 41: Food Concessions At Sports Venues

Chapter 43: Food Halls


Chapter 44: Food Trucks

Chapter 45: Pizzerias


Chapter 46: Quick-Service Restaurants


Chapter 47: Supermarket & Retail Prepared Foods

Chapter 48: Top Chains
Chapter 49: Top Chains By Segment

Chapter 50: Top Growth Chains

Chapter 53: Top Restaurant Franchisees

Chapter 62: Hot Concepts


Chapter 63: The Next 20

Chapter 66: Children’s Meals

Chapter 71: Food Safety


Chapter 72: Healthy Dining


Chapter 75: Locally Sourced & Organic Food
Chapter 76: Loyalty Programs

Chapter 77: Meal Kits
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Chapter 79: Restrictive Diet Menus


Chapter 80: Takeout & Delivery


Chapter 81: Use Of The Internet & Mobile For Dining


“Restaurant-Goers Are Eager For Deals,” eMarketer, September 23, 2016.
Chapter 82: Online Reservations

Chapter 84: App-Based Delivery Services


“Restaurant-Goers Are Eager For Deals,” eMarketer, September 23, 2016.


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Chapter 116: Top Cocktails
Chapter 125: National Food & Beverage Holidays