Restaurant, Food & Beverage Market Research Handbook 2020-2021

Richard K. Miller & Associates
since 1972
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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
- 2017: $676.6 billion
- 2018: $717.0 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
- 2017: $291.6 billion
- 2018: $314.6 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: $197.1 billion
- 2011: $214.1 billion
- 2012: $227.6 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
• 2017: $297.9 billion
• 2018: $310.9 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
• 2017: $28.5 billion
• 2018: $30.0 billion

1.6 Sales By Month
Monthly sales in 2018 for all food services and drinking places were as follows:
• January: $53.2 billion
• February: $53.4 billion
• March: $61.9 billion
• April: $59.0 billion
• May: $63.0 billion
• June: $62.4 billion
• July: $62.3 billion
• August: $63.2 billion
• September: $58.7 billion
• October: $60.3 billion
• November: $57.8 billion
• December: $61.7 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 51%. The industry employed 15.3 million people in 2019, according to the National Restaurant Association (www.restaurant.org).

2.2 Industry Sales
The National Restaurant Association assessed total restaurant industry sales at $862.9 billion in 2019, an increase of 3.6% from the previous year. Adjusted for inflation, 2019 projected restaurant-industry sales represent a 1.1% gain over 2018.

Distribution of sales for 2019 are assessed as follows (change from prior year in parenthesis):

**COMMERCIAL RESTAURANT SERVICES**
- Full-service restaurants: $285.3 billion (3.8%)
- Quick-service restaurants: $246.7 billion (3.2%)
- Snack and nonalcoholic beverage bars: $43.7 billion (4.6%)
- Bars and taverns: $22.0 billion (3.7%)
- Social caterers: $9.4 billion (4.1%)
- Cafeterias, grill-buffets, and buffets: $6.0 billion (-1.9%)
- Other: foodservice contractor managed services, retail host restaurants, hotel restaurants, recreation, sports, mobile, vending: $182.4 billion (3.8%)

**NONCOMMERCIAL RESTAURANT SERVICES**
- Businesses, educational, governmental, or institutional organizations which operate their own restaurant services: $64.6 billion (3.4%)

**MILITARY RESTAURANT SERVICES**
- Officer and NCO clubs (open mess), and military exchanges: $2.9 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>
<tbody>
<tr>
<td>2000</td>
<td>5.5%</td>
<td>3.0%</td>
</tr>
<tr>
<td>2001</td>
<td>4.6%</td>
<td>0.8%</td>
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<tr>
<td>2002</td>
<td>5.3%</td>
<td>1.2%</td>
</tr>
<tr>
<td>2003</td>
<td>4.5%</td>
<td>2.1%</td>
</tr>
<tr>
<td>2004</td>
<td>6.2%</td>
<td>3.0%</td>
</tr>
<tr>
<td>2005</td>
<td>5.3%</td>
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<tr>
<td>2006</td>
<td>4.7%</td>
<td>1.6%</td>
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<tr>
<td>2007</td>
<td>4.8%</td>
<td>1.0%</td>
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<tr>
<td>2008</td>
<td>3.5%</td>
<td>-0.9%</td>
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<tr>
<td>2009</td>
<td>-0.4%</td>
<td>-2.8%</td>
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<td>2010</td>
<td>3.0%</td>
<td>0.5%</td>
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<tr>
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<td>1.4%</td>
</tr>
<tr>
<td>2019</td>
<td>3.6%</td>
<td>1.1%</td>
</tr>
</tbody>
</table>

2.5 Restaurant Expenditures

According to the National Restaurant Association, expenses for full-service restaurants are distributed as follows:
• Cost of food and beverages sold: 32%
• Salaries and wages: 30%
• Restaurant occupancy costs: 7%
• General and administrative expenses: 3%
• 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 devised 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 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
- 2017: 647,288
- 2018: 660,755

The 2018 ReCount reported restaurants by ownership as follows:

- Independent: 352,815
- Chains: 307,940

The restaurant count by type of service was as follows:

- Quick-service and fast-casual: 357,766
- Full-service (including casual-dining, midscale/family-dining, and fine-dining): 302,989

3.2 Chain Restaurants

According to the 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*

<table>
<thead>
<tr>
<th>Type</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hamburger</td>
<td>94,384</td>
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<tr>
<td>Sandwiches/Deli</td>
<td>69,852</td>
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<tr>
<td>Pizza</td>
<td>63,320</td>
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<tr>
<td>Snacks</td>
<td>41,992</td>
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<tr>
<td>Chicken</td>
<td>38,162</td>
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<tr>
<td>American</td>
<td>37,942</td>
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<tr>
<td>Coffee</td>
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<tr>
<td>Taco</td>
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<tr>
<td>Mexican</td>
<td>8,235</td>
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<tr>
<td>Italian</td>
<td>4,941</td>
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<tr>
<td>Seafood</td>
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</tr>
<tr>
<td>Steak</td>
<td>3,869</td>
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<tr>
<td>Southwest/Tex-Mex</td>
<td>2,865</td>
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<tr>
<td>Chinese</td>
<td>2,524</td>
</tr>
<tr>
<td>Health Foods</td>
<td>2,445</td>
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<tr>
<td>Bar-B-Q</td>
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<tr>
<td>Asian</td>
<td>1,622</td>
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<tr>
<td>Bagels</td>
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<tr>
<td>Hot Dogs</td>
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</tr>
<tr>
<td>Greek/Mediterranean</td>
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</tr>
<tr>
<td>Japanese</td>
<td>600</td>
</tr>
<tr>
<td>Steak/Seafood</td>
<td>590</td>
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<tr>
<td>French/Continental</td>
<td>307</td>
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<tr>
<td>Californian</td>
<td>284</td>
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<tr>
<td>Cajun/Creole</td>
<td>193</td>
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<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>
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<tr>
<td>Middle Eastern</td>
<td>66</td>
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<td>Spanish</td>
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<td>Indian</td>
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<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, 3710 Corporex Park Drive, Suite 310, Tampa, FL 33619. (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 759,236 franchise locations in the United States in 2018; employment was 8.2 million, with sales of $451 billion.
Among franchise segments, the restaurant industry is the largest. There were 226,699 restaurant franchise locations in the United States in 2018; employment was 4.8 million, with sales of $328 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%)
- 2018: 194,723 (2.1%)

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%)
- 2018: 31,976 (1.8%)

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 billion (3.1%)
- 2014: $195.85 billion (5.8%)
- 2015: $207.87 billion (6.1%)
- 2016: $222.60 billion (7.1%)
- 2017: $237.60 billion (6.7%)
- 2018: $255.53 billion (7.3%)

Full Service Restaurants
- 2013: $52.24 billion (2.0%)
- 2014: $55.43 billion (6.1%)
- 2015: $58.93 billion (6.3%)
- 2016: $63.20 billion (7.3%)
- 2017: $67.50 billion (6.8%)
- 2018: $72.67 billion (7.2%)

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2020-2021
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%)
- 2018: 3,776,795 (4.5%)

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%)
- 2018: 1,059,629 (3.8%)

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
According to The NPD Group (www.npd.com), there were 63 million visits to U.S. restaurants in 2018, or 186 per capita. The total number of visits has fluctuated less than 1% each year since 2010 while visits per capita has declined slightly, from 197 per capita in 2010.

5.2 Dine-In Versus Take-Out
Dine-in visits account for 37% of restaurant sector traffic, compared with take-out occasions, which account for 63% of traffic. Restaurant meals consumed in-home accounted for 32% of all traffic, an increase of 2% from the prior year. 
On-premise dining occasions are on the rise, increasing about 1% per year, while off-premise occasions are declining at a 1% rate.

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 2018. Visits to full service restaurants, which combined represent 20% of total industry traffic, increased slightly.

5.4 Traffic By Daypart
The NPD Group reported growth/declines in restaurant traffic in 2018 as follows:
• Breakfast/morning snacks: 1%
• Lunch: no change
• Dinner: -1%

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

The NPD Group 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 2018 for each state as follows:

- Alabama: $ 9.0 billion
- Alaska: $ 1.8 billion
- Arizona: $14.7 billion
- Arkansas: $ 4.9 billion
- California: $97.0 billion
- Colorado: $13.9 billion
- Connecticut: $ 8.2 billion
- Delaware: $ 2.2 billion
- District of Columbia: $ 4.4 billion
- Florida: $50.1 billion
- Georgia: $22.9 billion
- Hawaii: $ 5.6 billion
- Idaho: $ 2.9 billion
- Illinois: $30.1 billion
- Indiana: $12.8 billion
- Iowa: $ 4.7 billion
- Kansas: $ 5.2 billion
- Kentucky: $ 8.5 billion
- Louisiana: $10.3 billion
- Maine: $ 2.5 billion
- Maryland: $13.3 billion
- Massachusetts: $18.7 billion
- Michigan: $17.9 billion
- Minnesota: $10.7 billion
- Mississippi: $ 5.1 billion
- Missouri: $11.7 billion
- Montana: $ 2.3 billion
- Nebraska: $ 3.3 billion
- Nevada: $ 9.9 billion
- New Hampshire: $ 3.0 billion
- New Jersey: $17.0 billion
- New Mexico: $ 4.0 billion
- New York: $51.6 billion
- North Carolina: $21.4 billion
- North Dakota: $ 1.4 billion
- Ohio: $24.2 billion
- Oklahoma: $ 7.6 billion
- Oregon: $ 9.7 billion
- Pennsylvania: $24.0 billion
- Rhode Island: $ 2.7 billion
- South Carolina: $10.7 billion
- South Dakota: $ 1.5 billion
- Tennessee: $14.2 billion
- Texas: $66.0 billion
- Utah: $ 5.5 billion
- Vermont: $ 1.1 billion
- Virginia: $18.1 billion
- Washington: $13.5 billion
- West Virginia: $ 2.8 billion
- Wisconsin: $10.1 billion
- Wyoming: $ 1.1 billion

#### 6.2 Restaurant Locations By State

According to the 2019 State of the Restaurant, by the National Restaurant Association, the number of restaurants by state are as follows:
6.3 Foodservice Employment By State

According to the National Restaurant Association, roughly 15 million people were employed in the restaurant and foodservice sector in 2019, a figure which is projected to increase at an average national rate of 0.9% through 2025.

Restaurant employment in 2019 and projection for 2029 are as follows:

<table>
<thead>
<tr>
<th>State</th>
<th>2019</th>
<th>2029</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama</td>
<td>8,620</td>
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</tr>
<tr>
<td>Alaska</td>
<td>1,485</td>
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<td>Wyoming</td>
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<tr>
<td>State</td>
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<td>Year 2</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------</td>
<td>--------</td>
</tr>
<tr>
<td>Georgia</td>
<td>488,400</td>
<td>556,700</td>
</tr>
<tr>
<td>Hawaii</td>
<td>98,900</td>
<td>104,800</td>
</tr>
<tr>
<td>Idaho</td>
<td>72,600</td>
<td>81,200</td>
</tr>
<tr>
<td>Illinois</td>
<td>588,700</td>
<td>630,100</td>
</tr>
<tr>
<td>Indiana</td>
<td>311,400</td>
<td>343,600</td>
</tr>
<tr>
<td>Iowa</td>
<td>152,500</td>
<td>168,100</td>
</tr>
<tr>
<td>Kansas</td>
<td>139,800</td>
<td>153,100</td>
</tr>
<tr>
<td>Kentucky</td>
<td>203,000</td>
<td>225,200</td>
</tr>
<tr>
<td>Louisiana</td>
<td>213,400</td>
<td>228,400</td>
</tr>
<tr>
<td>Maine</td>
<td>63,900</td>
<td>68,200</td>
</tr>
<tr>
<td>Maryland</td>
<td>259,000</td>
<td>280,100</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>349,300</td>
<td>376,100</td>
</tr>
<tr>
<td>Michigan</td>
<td>447,200</td>
<td>479,100</td>
</tr>
<tr>
<td>Minnesota</td>
<td>275,900</td>
<td>299,600</td>
</tr>
<tr>
<td>Mississippi</td>
<td>121,900</td>
<td>134,300</td>
</tr>
<tr>
<td>Missouri</td>
<td>300,300</td>
<td>328,100</td>
</tr>
<tr>
<td>Montana</td>
<td>57,200</td>
<td>61,700</td>
</tr>
<tr>
<td>Nebraska</td>
<td>96,900</td>
<td>104,200</td>
</tr>
<tr>
<td>Nevada</td>
<td>219,200</td>
<td>252,100</td>
</tr>
<tr>
<td>New Hampshire</td>
<td>69,500</td>
<td>76,500</td>
</tr>
<tr>
<td>New Jersey</td>
<td>333,000</td>
<td>363,000</td>
</tr>
<tr>
<td>New Mexico</td>
<td>96,400</td>
<td>104,100</td>
</tr>
<tr>
<td>New York</td>
<td>865,800</td>
<td>914,500</td>
</tr>
<tr>
<td>North Carolina</td>
<td>481,900</td>
<td>546,000</td>
</tr>
<tr>
<td>North Dakota</td>
<td>39,700</td>
<td>42,800</td>
</tr>
<tr>
<td>Ohio</td>
<td>585,000</td>
<td>638,400</td>
</tr>
<tr>
<td>Oklahoma</td>
<td>184,700</td>
<td>198,400</td>
</tr>
<tr>
<td>Oregon</td>
<td>211,200</td>
<td>235,700</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>580,000</td>
<td>614,400</td>
</tr>
<tr>
<td>Rhode Island</td>
<td>57,600</td>
<td>62,000</td>
</tr>
<tr>
<td>South Carolina</td>
<td>234,200</td>
<td>265,500</td>
</tr>
<tr>
<td>South Dakota</td>
<td>48,200</td>
<td>52,900</td>
</tr>
<tr>
<td>Tennessee</td>
<td>330,000</td>
<td>366,000</td>
</tr>
<tr>
<td>Texas</td>
<td>1,344,200</td>
<td>1,548,300</td>
</tr>
<tr>
<td>Utah</td>
<td>129,900</td>
<td>146,800</td>
</tr>
<tr>
<td>Vermont</td>
<td>29,600</td>
<td>31,600</td>
</tr>
<tr>
<td>Virginia</td>
<td>378,600</td>
<td>416,600</td>
</tr>
<tr>
<td>Washington</td>
<td>333,500</td>
<td>370,100</td>
</tr>
<tr>
<td>West Virginia</td>
<td>72,500</td>
<td>77,800</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>284,600</td>
<td>314,400</td>
</tr>
<tr>
<td>Wyoming</td>
<td>28,700</td>
<td>31,400</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 April 2019.

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>22%</td>
<td>18%</td>
</tr>
<tr>
<td>New England:</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Middle Atlantic:</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>South Atlantic:</td>
<td>69%</td>
<td>9%</td>
<td>23%</td>
</tr>
<tr>
<td>East North Central:</td>
<td>66%</td>
<td>14%</td>
<td>20%</td>
</tr>
<tr>
<td>East South Central:</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>West North Central:</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>West South Central:</td>
<td>32%</td>
<td>0%</td>
<td>68%</td>
</tr>
<tr>
<td>Mountain:</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Pacific:</td>
<td>52%</td>
<td>42%</td>
<td>6%</td>
</tr>
</tbody>
</table>
### States
- California: 43% 43% 13%
- Florida: 78% 0% 22%
- Michigan: 53% 27% 20%
- Washington: 48% 53% 0%

#### 7.3 Restaurant Customer Traffic
Customer traffic compared with one year prior was assessed as follows:

<table>
<thead>
<tr>
<th>Region</th>
<th>Higher</th>
<th>Lower</th>
<th>Same</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States:</td>
<td>48%</td>
<td>30%</td>
<td>22%</td>
</tr>
</tbody>
</table>

#### Region
- New England: n/a n/a n/a
- Middle Atlantic: n/a n/a n/a
- South Atlantic: 40% 31% 29%
- East North Central: 66% 14% 20%
- East South Central: n/a n/a n/a
- West North Central: n/a n/a n/a
- West South Central: 32% 18% 50%
- Mountain: n/a n/a n/a
- Pacific: 33% 50% 17%

### State
- California: 17% 43% 39%
- Florida: 22% 44% 33%
- Michigan: 53% 27% 20%
- Washington: 20% 80% 0%

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Higher</th>
<th>Lower</th>
<th>Same</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States:</td>
<td>47%</td>
<td>3%</td>
<td>50%</td>
</tr>
</tbody>
</table>

#### Region
- New England: n/a n/a n/a
- Middle Atlantic: n/a n/a n/a
- South Atlantic: 57% 9% 34%
- East North Central: 64% 8% 28%
- East South Central: n/a n/a n/a
- West North Central: n/a n/a n/a
- West South Central: 14% 0% 86%
- Mountain: n/a n/a n/a
- Pacific: 50% 0% 50%
State

- California: 52% 0% 48%
- Florida: 56% 0% 44%
- Michigan: 47% 0% 53%
- Washington: 0% 0% 100%

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

NATIONAL DINING TRENDS SURVEY

8.1 Overview


8.2 Dining Out

On average, U.S. adults dine out for lunch or dinner 4.9 times per week. The most frequent diners are in the following cities:

- Houston, TX: 5.7 times per week
- Dallas-Fort Worth, TX: 5.6 times per week
- Los Angeles, CA: 5.6 times per week
- Miami, FL: 5.6 times per week

The average national spend per person for dinner out is $36.40. Diners in the following cities report the highest average spending for dinner:

- New York, NY: $46.14
- Boston, MA: $41.54
- Chicago, IL: $38.66
- Washington, DC: $38.45

Diners in the following cities report the lowest average spending for dinner:

- Detroit, MI: $28.77
- Minneapolis, MN: $29.67
- Atlanta, GA: $30.46
- Austin, TX: $30.48
- Charlotte, NC: $30.50

When asked about traveling for a specific dining experience, responses were as follows:

- Would travel 30 minutes: 54%
- Would travel a few hours: 30%
- Willing to make a weekend drive: 13%
- Willing to fly and make a vacation around a meal: 13%
Farm-to-table dining is important in selecting where to dine among 73% of adults. In selecting cocktails, 63% say fresh juice ingredients are important. Seventy-nine percent (79%) of diners consider themselves foodies.

8.3 Dining Preferences

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

- Noise: 24%
- Service: 23%
- Crowds: 15%
- Prices: 12%
- Parking: 10%

Regarding reservations, practices among survey participants are as follows:

- Make reservations via the Internet: 57%
- Call restaurant directly to place a reservation: 30%
- Do not generally make a reservation: 9%
- Make reservations in person: 4%

When asked about fellow diners using their smartphones at the table, opinions were as follows:

- Okay in moderation: 57%
- Completely unacceptable, unless it’s an emergency: 35%
- Perfectly acceptable: 12%
- No opinion: 6%

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: 36%
- Communal tables: 33%
- No-substitution policy: 27%
- Reservation-only policy: 19%

Survey participants have the following opinions regarding some restaurant trends:

- Seventy percent (70%) do not like stools or backless chairs.
- Forty-seven percent (47%) do not mind paying their restaurant tab with a handheld device, 22% love it, and 20% do not like the concept.
- Forty-two percent (42%) don’t mind ordering on a screen or kiosk, 37% dislike the concept, and 12% love it.
8.4 Social Media Posts
Fifty-three percent (53%) 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-one percent (41%) of diners nationally say that they take photos of meals when dining out to share on social media. Sixteen percent (16%) have picked a place to eat just so they can take their own food photos.

Food photography is so popular that 49% admit to stopping dining companions from eating so they can take food photos, 35% say they have taken photos of every dish at the table, and 5% have even asked another table if they can photograph their dish.

Among diners who post pictures to social media, 35% do so right at the table, 14% do it on the way home, 38% post later that day, and 11% save them for later.

8.5 Tipping
U.S. adults leave an average gratuity of 18.1% on their restaurant bill.

The following cities have the most generous tippers:
• Philadelphia, PA: 20.3%
• Denver, CO: 19.5%
• Washington, DC: 19.2%
• Boston, MA: 19.0%
• Chicago, IL: 19.0%

Forty-three percent (43%) of diners nationally favor the elimination of tipping and higher menu prices; 33% are strongly against this practice.

8.6 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 the U.S. Department of Agriculture, Economic Research Service (www.ers.usda.gov), households allocate spending for food 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%

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%
  - Potatoes and roots: 1.6%
  - Eggs: 1.4%
  - Pasta: 1.4%
  - Fish and seafood: 0.8%
  - Legumes: 0.8%
  - Vegetables: 0.7%
  - Other: 4.7%
- Processed foods: 9.4%
  - Cheese: 3.7%
  - Processed meat and fish: 1.2%
  - Pickles: 0.7%
  - Other: 3.8%
- Ultra-processed foods: 57.9%
  - Breads and cereal: 12.2%
  - Cake, ice cream, and other sweets: 12.3%
- Soda and fruit drinks: 7.0%
- Salty snacks: 4.6%
- Frozen and packaged meals: 4.0%
- Pizza: 3.5%
- Sauces: 2.4%
- Ultra-processed meat/fish: 2.4%
- Milk-based drinks: 1.8%
- Fries: 1.7%
- Sandwiches: 1.4%
- Soup: 0.8%
- Other: 3.8%

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 source food from each venue. The following is a summary of the 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 use this source for food 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

The report is published every five years. Dietary Guidelines 2020-2025 will be published in 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.
9.6 Market Resources


### 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>QSR</th>
<th>Local Casual</th>
<th>Casual Chain</th>
<th>Local Fine Dining</th>
<th>Fine Dining Chain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female:</td>
<td>62%</td>
<td>55%</td>
<td>54%</td>
<td>17%</td>
<td>9%</td>
</tr>
<tr>
<td>Male:</td>
<td>66%</td>
<td>53%</td>
<td>50%</td>
<td>19%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Age

<table>
<thead>
<tr>
<th>Age</th>
<th>QSR</th>
<th>Local Casual</th>
<th>Casual Chain</th>
<th>Local Fine Dining</th>
<th>Fine Dining Chain</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-to-35:</td>
<td>71%</td>
<td>52%</td>
<td>57%</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>36-to-47:</td>
<td>68%</td>
<td>51%</td>
<td>52%</td>
<td>20%</td>
<td>9%</td>
</tr>
<tr>
<td>48-to-66:</td>
<td>61%</td>
<td>55%</td>
<td>51%</td>
<td>14%</td>
<td>5%</td>
</tr>
<tr>
<td>67 and older:</td>
<td>51%</td>
<td>61%</td>
<td>45%</td>
<td>19%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Family

<table>
<thead>
<tr>
<th>Family</th>
<th>QSR</th>
<th>Local Casual</th>
<th>Casual Chain</th>
<th>Local Fine Dining</th>
<th>Fine Dining Chain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children in HH:</td>
<td>73%</td>
<td>50%</td>
<td>56%</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>No children in HH:</td>
<td>61%</td>
<td>55%</td>
<td>51%</td>
<td>18%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Community

<table>
<thead>
<tr>
<th>Community</th>
<th>QSR</th>
<th>Local Casual</th>
<th>Casual Chain</th>
<th>Local Fine Dining</th>
<th>Fine Dining Chain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urban:</td>
<td>64%</td>
<td>50%</td>
<td>47%</td>
<td>23%</td>
<td>11%</td>
</tr>
<tr>
<td>Surburban:</td>
<td>63%</td>
<td>56%</td>
<td>57%</td>
<td>19%</td>
<td>9%</td>
</tr>
<tr>
<td>Rural:</td>
<td>67%</td>
<td>54%</td>
<td>47%</td>
<td>10%</td>
<td>5%</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 a 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

DINING OUT - FREQUENCY

11.1 Overview
A recent Gallup Poll (www.gallup.com) asked adults how frequently they dine out. The following is a summary of the poll:
• Sixty-one percent (61%) of adults ate dinner out at least once in last seven days.
• Sixteen percent (16%) are frequent diners, eating dinner out three or more times.
• Eating at a restaurant strongly relates to age and income.

11.2 Dining Frequency
Respondents reported the frequency of eating dinner at a restaurant in the past week as follows:
• Zero times: 38%
• One time: 26%
• Two times: 19%
• Three or more times: 16%

11.3 Dining Out By Household Income And Age
By household income, respondents reported eating dinner at a restaurant in the past week is as follows:

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

By age, respondents reported eating dinner at a restaurant in the past week as follows:

<table>
<thead>
<tr>
<th>Age</th>
<th>Zero times</th>
<th>One time</th>
<th>Two times</th>
<th>Three or more times</th>
<th>At least once (total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-to-34</td>
<td>28%</td>
<td>35%</td>
<td>50%</td>
<td>50%</td>
<td>72%</td>
</tr>
<tr>
<td>35-to-54</td>
<td>31%</td>
<td>26%</td>
<td>22%</td>
<td>22%</td>
<td>65%</td>
</tr>
<tr>
<td>55+</td>
<td>21%</td>
<td>20%</td>
<td>17%</td>
<td>17%</td>
<td>50%</td>
</tr>
</tbody>
</table>
Adults reported eating dinner at a restaurant at least once in the past week, by age and income, as follows:

<table>
<thead>
<tr>
<th>Age Range</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>

11.4 Market Resources
PUBLICALLY TRADED RESTAURANT CORPORATIONS

12.1 Overview
Stocks for 47 restaurant corporations are traded on the New York Stock Exchange and NASDAQ. The combined market capitalization for these 47 companies is $385 billion (as of Second Quarter 2019).

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

<table>
<thead>
<tr>
<th>Company</th>
<th>Ticker</th>
<th>Market Cap</th>
</tr>
</thead>
<tbody>
<tr>
<td>McDonald’s Corporation</td>
<td>MCD</td>
<td>$152.7 billion</td>
</tr>
<tr>
<td>Starbucks Corp.</td>
<td>SBUX</td>
<td>$  95.6 billion</td>
</tr>
<tr>
<td>Yum! Brands, Inc.</td>
<td>YUM</td>
<td>$  30.9 billion</td>
</tr>
<tr>
<td>Chipotle Mexican Grill, Inc.</td>
<td>CMG</td>
<td>$  19.6 billion</td>
</tr>
<tr>
<td>Restaurant Brands International, Inc.</td>
<td>QSR</td>
<td>$  17.2 billion</td>
</tr>
<tr>
<td>Darden Restaurants, Inc.</td>
<td>DRI</td>
<td>$  14.6 billion</td>
</tr>
<tr>
<td>Dominos Pizza, Inc.</td>
<td>DPZ</td>
<td>$  11.4 billion</td>
</tr>
<tr>
<td>Dunkin Brands Group, Inc.</td>
<td>DNKN</td>
<td>$   6.2 billion</td>
</tr>
<tr>
<td>The Wendy’s Company:</td>
<td>WEN</td>
<td>$   4.3 billion</td>
</tr>
<tr>
<td>Cracker Barrel Old Country Store, Inc.</td>
<td>CBRL</td>
<td>$   3.9 billion</td>
</tr>
<tr>
<td>Texas Roadhouse, Inc.</td>
<td>TXRH</td>
<td>$   3.8 billion</td>
</tr>
<tr>
<td>Wingstop, Inc.</td>
<td>WING</td>
<td>$   2.3 billion</td>
</tr>
<tr>
<td>The Cheesecake Factory Incorporated</td>
<td>CAKE</td>
<td>$   2.1 billion</td>
</tr>
<tr>
<td>Dave &amp; Busters Entertainment, Inc.</td>
<td>PLAY</td>
<td>$   2.0 billion</td>
</tr>
<tr>
<td>Jack in the Box, Inc.</td>
<td>JACK</td>
<td>$   2.0 billion</td>
</tr>
<tr>
<td>Bloomin’ Brands, Inc.</td>
<td>BLMN</td>
<td>$   1.8 billion</td>
</tr>
<tr>
<td>Shake Shack, Inc.</td>
<td>SHAK</td>
<td>$   1.8 billion</td>
</tr>
<tr>
<td>Brinker International, Inc.</td>
<td>EAT</td>
<td>$   1.5 billion</td>
</tr>
<tr>
<td>Dine Brands Global</td>
<td>DIN</td>
<td>$   1.5 billion</td>
</tr>
<tr>
<td>Papa John’s International, Inc.</td>
<td>PZZA</td>
<td>$   1.5 billion</td>
</tr>
<tr>
<td>Denny’s Corporation</td>
<td>DENN</td>
<td>$   1.2 billion</td>
</tr>
<tr>
<td>BJ’s Restaurants, Inc.</td>
<td>BJRI</td>
<td>$  977 million</td>
</tr>
<tr>
<td>Ruth’s Hospitality Group, Inc.</td>
<td>RUTH</td>
<td>$  744 million</td>
</tr>
<tr>
<td>El Pollo Loco Holdings, Inc.</td>
<td>LOCO</td>
<td>$  429 million</td>
</tr>
<tr>
<td>Red Robin Gourmet Burgers, Inc.</td>
<td>RRGB</td>
<td>$  423 million</td>
</tr>
</tbody>
</table>
- Fiesta Restaurant Group, Inc.: FRGI $383 million
- Nathan’s Famous, Inc.: NATH $271 million
- Carrols Restaurant Group, Inc.: TAST $369 million
- Chuy’s Holdings Inc.: CHUY $364 million
- Noodles & Company: NDLS $356 million
- Habit Restaurants, Inc.: HABT $253 million
- Biglari Holdings Inc.: BH $222 million
- Del Frisco’s Restaurant Group, LLC: DFRG $160 million
- J. Alexander’s Holdings, Inc.: JAX $159 million
- Potbelly Corporation: PBPB $134 million
- Papa Murphy’s Holdings, Inc.: FRSH $110 million
- The One Group Hospitality: STKS $100 million
- Ark Restaurants: ARKR $70 million
- Flanigan’s Enterprises Inc.: BDL $45 million
- Luby’s, Inc.: LUB $41 million
- Famous Dave’s of America, Inc.: DAVE $39 million
- Rave Restaurant Group: RAVE $34 million
- Diversified Restaurant Holdings: SAUC $30 million
- Good Times Restaurants Inc.: GTIM $28 million
- Noble Roman’s Inc.: NROM $13 million
- Chanticleer Holdings, Inc.: BURG $5 million
- Granite City Food & Brewery: GCFB $4 million
13

SAME-STORE SALES

13.1 By Quarter
Restaurant year-over-year same-store sales growth and traffic trends have been as follows (sources: MillerPulse and *Nation’s Restaurant News*):

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Sales</th>
<th>Traffic</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Quarter</td>
<td>0.5%</td>
<td>-1.8%</td>
</tr>
<tr>
<td>Second Quarter</td>
<td>1.8%</td>
<td>-0.2%</td>
</tr>
<tr>
<td>Third Quarter</td>
<td>1.2%</td>
<td>-0.8%</td>
</tr>
<tr>
<td>Fourth Quarter</td>
<td>1.2%</td>
<td>-0.8%</td>
</tr>
<tr>
<td>First Quarter</td>
<td>1.2%</td>
<td>-1.2%</td>
</tr>
<tr>
<td>Second Quarter</td>
<td>2.0%</td>
<td>-0.5%</td>
</tr>
<tr>
<td>Third Quarter</td>
<td>2.5%</td>
<td>0.5%</td>
</tr>
<tr>
<td>Fourth Quarter</td>
<td>3.8%</td>
<td>0.5%</td>
</tr>
<tr>
<td>First Quarter</td>
<td>4.5%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Second Quarter</td>
<td>3.8%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Third Quarter</td>
<td>2.5%</td>
<td>-0.2%</td>
</tr>
<tr>
<td>Fourth Quarter</td>
<td>1.8%</td>
<td>-0.5%</td>
</tr>
<tr>
<td>First Quarter</td>
<td>1.5%</td>
<td>-0.2%</td>
</tr>
<tr>
<td>Second Quarter</td>
<td>0.1%</td>
<td>-1.8%</td>
</tr>
<tr>
<td>Third Quarter</td>
<td>0.0%</td>
<td>-2.2%</td>
</tr>
<tr>
<td>Fourth Quarter</td>
<td>-0.5%</td>
<td>-2.5%</td>
</tr>
<tr>
<td>First Quarter</td>
<td>-0.5%</td>
<td>-2.5%</td>
</tr>
<tr>
<td>Second Quarter</td>
<td>0.0%</td>
<td>-2.2%</td>
</tr>
<tr>
<td>Third Quarter</td>
<td>-0.5%</td>
<td>-2.5%</td>
</tr>
<tr>
<td>Fourth Quarter</td>
<td>1.5%</td>
<td>-0.8%</td>
</tr>
<tr>
<td>First Quarter</td>
<td>0.8%</td>
<td>-2.2%</td>
</tr>
<tr>
<td>Second Quarter</td>
<td>1.5%</td>
<td>-1.5%</td>
</tr>
<tr>
<td>Third Quarter</td>
<td>1.8%</td>
<td>-1.5%</td>
</tr>
<tr>
<td>Fourth Quarter</td>
<td>0.8%</td>
<td>-2.0%</td>
</tr>
</tbody>
</table>

13.2 By Sector and Brand
Restaurant year-over-year same-store sales growth by sector and brand in 2018 were as follows (source: *Advertising Age* and Technomic):
Burgers

- McDonalds: 2.5%
- Burger King: 1.4%
- Shake Shack: 1.0%
- Wendy’s: 0.9%
- Jack in the Box: 0.1%
- Steak ‘n Shake: -5.1%

Casual Dining

- Texas Roadhouse: 5.4%
- Applebee’s: 5.0%
- Outback Steakhouse: 4.0%
- LongHorn Steakhouse: 2.7%
- Olive Garden: 2.4%
- Cheesecake Factory: 1.7%
- IHOP: 1.5%
- Denny’s: 0.8%
- Chili’s: -1.3%
- Red Robin Gourmet Burgers: -2.6%

Coffee

- Starbucks: 2.0%
- Dunkin’: 0.6%

Mexican

- Taco Bell: 4.0%
- Chipotle Mexican Grill: 4.0%
- Del Taco: 2.5%

Pizza

- Domino’s: 6.6%
- Pizza Hut: 2.0%
- Papa John’s: -7.3%
PART II:  TRENDS FOR 2019
14.1 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.

2019 Culinary Forecast, based on the NRA-ACF survey, presents the following culinary trends:

14.2 Top Concept Trends

The top concept trends for 2019 are as follows:

1. Cannabis/CBD-infused drinks
2. Cannabis/CBD-infused food
3. Zero-waste cooking (elevated cuisine using food scraps)
4. Globally inspired breakfast dishes
5. Global flavors in kids’ meals
6. Hyper-local (e.g. restaurant gardens, onsite beer brewing, house-made items)
7. New cuts of meat (e.g. shoulder tender, oyster steak, Vegas Strip Steak, Merlot cut)
8. Veggie centric/vegetable forward cuisine
9. Chef-driven fast-casual concepts
10. Craft/artisan/locally produced spirits

14.3 Top Trends By Category

By food category, the following are the top trends for 2019:

Alcoholic Beverages

1. Craft/artisan/locally produced spirits
2. Onsite barrel-aged drinks
3. Culinary cocktails (e.g. savory, fresh ingredients, herb-infused)
4. Locally produced spirits/wine/beer
5. Rosé cider
Condiments
1. House-made condiments/specialty condiments
2. North African condiments (e.g. dukka, zhug, harissa, ras el hanout)
3. Shichimi spice/powder
4. Gochujang (i.e. Korean red-pepper paste)
5. Berbere

Culinary Concepts
1. Cannabis/CBD-infused food
2. Zero-waste cooking (elevated cuisine using food scraps)
3. Hyper-local (e.g. restaurant gardens, onsite beer brewing, house-made items)
4. Veggie centric/vegetable forward cuisine
5. Natural ingredients/clean menus

Dishes
1. Globally inspired breakfast dishes
2. Vegetable carb substitutes (e.g. cauliflower rice, zucchini spaghetti)
3. Street food-inspired dishes (e.g. tempura, kabobs, dumplings)
4. Katso Sando (Japanese cutlet sandwich)
5. House-made artisan pickles

Global Flavors
1. North African cuisine/flavors (e.g. fuul, tajines)
2. West African cuisine/flavors
3. Peruvian cuisine
4. Ethiopian/Eritrean cuisine/flavors (e.g. Berbere, injera)
5. Filipino cuisine

Kids’ Meals
1. Global flavors in kids’ meals
2. Gourmet items in kids’ meals
3. Healthful kids’ meals
4. Whole grain items in kids’ meals
5. Sliders/mini-burgers in kids’ meals

Non-Alcoholic Beverages
1. Cannabis/CBD infused drinks
2. Gazol (i.e. non-alcoholic spritzer from Israel)
3. Craft/house-roasted coffee
4. Nitrogen/cold brew coffee

Pasta and Grains
1. Protein-rich grains/seeds (e.g. hemp, chia, quinoa, flax)
2. Non-wheat noodles/pasta (e.g. quinoa, rice, buckwheat)
3. Ancient grains (e.g. kamut, spelt, amaranth, lupin)
4. Savory granola
5. Teff

Produce
1. Uncommon herbs (e.g. chervil, lovage, lemon balm, papalo)
2. Locally sourced produce
3. Imperfect/ugly produce
4. Exotic fruit (e.g. rambutan, dragon fruit, paw paw, guava)
5. Super fruit (e.g. açai, goji berry, mangosteen)

Protein
1. New cuts of meat (e.g. shoulder tender, oyster steak, Vegas Strip Steak, Merlot cut)
2. Plant-based sausages and burgers
3. Locally sourced meat and seafood
4. Sustainable seafood
5. Heritage-breed meats

Restaurant Concepts
1. Chef-driven fast casual concepts
2. Pop-up temporary restaurants
3. Commissaries (e.g. shared commercial kitchen space)
4. Small-plate menus
5. Food halls

Snacks/Sweets
1. Thai-rolled ice cream
2. Doughnuts with non-traditional fillins (e.g. liquer, Earl Grey cream)
3. Chocolate - responsibly sourced, new flavors
4. Injera chips
5. Artisan/house-made ice cream

14.4 Market Resources
2019 Culinary Forecast, National Restaurant Association and American Culinary Federation, December 2018.
(www.restaurant.org/Downloads/PDFs/Research/WhatsHot/WhatsHotFinal2019.pdf)
15.1 Overview
Several analysts and media sources publish annual assessments and forecasts of restaurant trends. This chapter identifies several of these market research studies.

15.2 Market Research
The following are links to 2019 market research studies:

Aaron Allen & Associates
- Global Restaurant Industry: What to Expect in 2019

Andrew Freeman & Co.

Baum + Whiteman

Eater.com
- Every Single Food Trend Predicted to Take Over 2019

Flavor Forecast

Food & Drink Resources

Food + Wine
- 11 Biggest Restaurant Trends of 2019, According to Chefs

Global Food Forums
- List of Top 2019 Food Trends and Forecasts
Nation’s Restaurant News

Restaurant Business
• Growth Forecast For Restaurants In 2019 (www.restaurantbusinessonline.com/financing/spotty-growth-forecast-restaurants-2019)

Restaurant Dive

Restaurant Insider
• 2019 Restaurant Trends (https://upserve.com/restaurant-insider/restaurant-industry-trends/)

Square Inc.

Stirling-Rice Group

Technomic
• Seven Key Trends For 2019 (www.technomic.com/newsletters/technomics-take/7-key-trends-2019)

Upserve

15.3 Market Resources
Aaron Allen & Associates, 35 East Wacker Drive, Suite 3500, Chicago, IL 60601. (312) 701-3500. (www.aaronallen.com)


Baum + Whiteman, 912 President Street, Brooklyn, NY 11215. (718) 622-0200. (www.baumwhiteman.com)

Food & Drink Resources, 6555 South Kenton Street, Suite 302, Centennial, CO 80111. (720) 255-2679. (www.foodanddrinkresources.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)

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

Technomic, Inc., 300 South Riverside Plaza, Suite 1200, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)
PART III: THE CUSTOMER
16

CUSTOMER PROFILE

16.1 Restaurant Visits By Demographic

According to The NPD Group (www.npd.com) and Nation’s Restaurant News, the distribution of restaurant traffic and spending by age group is as follows:

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Pct. of Population</th>
<th>Pct. of Traffic</th>
<th>Pct. of Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seniors (1945 and before)</td>
<td>10%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Baby Boomers (1946-1964)</td>
<td>23%</td>
<td>26%</td>
<td>29%</td>
</tr>
<tr>
<td>Generation X (1965-1979)</td>
<td>20%</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>Millennials (1980-2000)</td>
<td>24%</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td>Generation Z (2001-present)</td>
<td>23%</td>
<td>20%</td>
<td>18%</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Pct.</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-to-24</td>
<td>13%</td>
</tr>
<tr>
<td>25-to-34</td>
<td>17%</td>
</tr>
<tr>
<td>35-to-44</td>
<td>19%</td>
</tr>
<tr>
<td>45-to-54</td>
<td>20%</td>
</tr>
<tr>
<td>55-to-64</td>
<td>16%</td>
</tr>
<tr>
<td>65 and older</td>
<td>16%</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Gender</th>
<th>Pct.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>54%</td>
</tr>
<tr>
<td>Female</td>
<td>46%</td>
</tr>
</tbody>
</table>
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 The Media Audit (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):

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2020-2021
• 66 •
<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

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 Technomic (www.technomic.com), 34% of adults say kids-eat-free specials are very likely to influence them to visit a restaurant.

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.

When parents were asked in a survey by The NPD Group the top reasons for choosing a restaurant when dining with kids, responses were as follows (percentage of respondents; multiple responses allowed):

- Menu offerings: 86%
- Price/value: 80%
- Convenience: 75%
- Environment/ambiance: 70%
- Health/nutrition: 70%
- Kid-friendly environment: 69%
- Kid-friendly features: 63%
“Kids are key drivers in families’ dining decisions. It used to be that restaurants had to please moms to attract families. But today, it’s all about the kids.”

Nation’s Restaurant News, 4/16/18

17.2 Dining With Children Under Age 18

Families with children under 18 years old account for about 27 billion restaurant visits each year.

By annual household income, average per-capita restaurant visits by families with children under age 18 are 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

HISPANIC-AMERICAN CUSTOMERS

18.1 Overview

The Hispanic- and Latino-American population at year-end 2018 was 58.9 million, or 18.1% 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

Technomic (www.technomic.com) provides the following assessment of Hispanic 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.
- Thirty-four percent (34%) of Hispanic foodservice consumers visit fast-casual restaurants at least once a week.
- Nineteen percent (19%) of Hispanic consumers' restaurant purchases are ordered for delivery.

The following are other 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 (69%) 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.

“Hispanics consistently have higher eater checks across QSR, mid-scale, and casual dining.”

Peter Filiaci, VP Strategy
Univision
Nation’s Restaurant News, 11/13/18

18.3 Hispanic-American Dining Characteristics

Garcia Research Associates (www.garciaresearch.com) found the pattern of restaurant visits by English-speaking Hispanic-Americans is virtually the same as that of non-Hispanics. Dining patterns, however, vary for less-acculturated Hispanic-Americans who speak only or mostly Spanish. The following daytime restaurant traffic distribution among these three groups is as follows:

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

According to Technomic, less-acculturated consumers are twice as likely as more-acculturated Hispanics to look for Hispanic foods (39% and 20%, respectively) and flavors (45% and 20%, respectively) at American-style restaurants. Twice as many Hispanics (44%) compared to the general population (21%) say they would pay more for food described as authentic.

Sixty-three percent (63%) of Hispanics say that restaurants are an ideal place to spend quality time with family, compared with 52% of non-Hispanics. More Hispanic consumers (46%) than the general population (33%) say that a family-friendly
atmosphere is one of the most important restaurant attributes they look for when deciding where to eat, according to Technomic.

Hispanics 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*, by Technomic, reported favorite restaurant brands among Hispanic diners as follows:

- In-N-Out Burger had the highest overall rating among Hispanic consumers.
- Among full-service restaurants, Denny’s had the highest percentage of Hispanic patrons who dine at least once per month.
- Among limited-service restaurants, Pollo Campero had 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](http://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
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 2019, Millennials spanned ages 19 through 37. 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 43 in 2019.

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 Millennial Parents
According to the Pew Research Center (www.pewresearch.org), more than a million Millennials give birth each year. There were more than 19 million Millennial moms in the U.S. at year-end 2018.

_________________________________________________________________
“Millennial parents are a large – and growing – demographic. How to win over Millennials? Cater to their kids.”
Nation’s Restaurant News, 4/1/19
_________________________________________________________________

19.3 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.”

Nation’s Restaurant News

19.4 Dining Out

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

<table>
<thead>
<tr>
<th>Breakfast</th>
<th>Total</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<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>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lunch</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<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>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dinner</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<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>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Weekend Brunch</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<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 Millennials. The comparison is as follows:

<table>
<thead>
<tr>
<th>Breakfast</th>
<th>Total</th>
<th>African-American</th>
<th>Hispanic</th>
</tr>
</thead>
<tbody>
<tr>
<td>At least once a week:</td>
<td>22%</td>
<td>34%</td>
<td>31%</td>
</tr>
<tr>
<td>A few times a month:</td>
<td>16%</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>Rarely or never:</td>
<td>62%</td>
<td>48%</td>
<td>50%</td>
</tr>
</tbody>
</table>
Lunch
• At least once a week: 36% 43% 45%
• A few times a month: 35% 32% 32%
• Rarely or never: 29% 25% 23%

Dinner
• At least once a week: 38% 39% 45%
• A few times a month: 42% 40% 36%
• Rarely or never: 20% 20% 16%

Weekend Brunch
• At least once a week: 16% 24% 25%
• A few times a month: 17% 19% 20%
• Rarely or never: 67% 57% 54%

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

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

By ethnicity, responses were as follows:

<table>
<thead>
<tr>
<th></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>

19.6 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.
20

GENERATION Z CUSTOMERS

20.1 Overview
The generation born in or after 1997 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 Generation Z population in April 2019 at 95.2 million.

20.2 Restaurant Visits By Generation Zs
According to The NPD Group (www.npd.com), Generation Zs made 14.6 million restaurant visits in 2018, representing 25% of restaurant traffic. This was the second-largest share of restaurant visits, trailing only the 17.0 million restaurant visits by Baby Boomers. (The NPD Group defines Generation Z as people born after 1995.)

Generation Z annual spending at restaurants is approximately $85 billion, or 20% of total restaurant spending.

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.
“Gen Zs are getting older and making their mark on restaurants and eating trends. Being the first generation never knowing a world without the internet or technology, they are regular users of restaurant apps and delivery. They are also heavy users of restaurant tablets and order kiosks.”

The NPD Group, 2/21/19

20.3 Restaurant Spending By Teens

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

In the Spring 2019 edition of Taking Stock With Teens, Piper Jaffrey reported the largest spending category was food, accounting for 24% of teen spending. Food surpassed spending on clothing in 2017 and has remained the top spending category. Annual total teen spending is $830 billion, or $2,600 per capita. Spending for food is $200 billion, or $625 per teen.

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. Sixty-five percent (65%) of teens prefer limited service restaurants, according to the Piper Jaffrey survey.

20.4 Favorite Chain Restaurants

When asked in the 2019 Piper Jaffrey survey about chain restaurant brands, teens indicated their favorites as follows:

**Upper Income Households**
1. Chick-fil-A
2. Starbucks
3. Chipotle
4. McDonalds
5. (tie) Dunkin’
5. (tie) Olive Garden
5. (tie) Panera Bread
8. (tie) Buffalo Wild Wings
8. (tie) Raising Cane’s
8. (tie) Taco Bell

**Average Income Households**
1. (tie) Chick-fil-A
1. (tie) Starbucks
3. McDonald’s
4. Taco Bell
5. (tie) Buffalo Wild Wings
5. (tie) Chipotle
5. (tie) Olive Garden
8. (tie) Applebee’s
8. (tie) Dunkin’
8. (tie) Panera Bread
In a 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
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
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></th>
<th>Under 18</th>
<th>18-to-24</th>
<th>25-to-34</th>
<th>35-to-49</th>
<th>50 and Older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fine-dining</td>
<td>n/a</td>
<td>76%</td>
<td>70%</td>
<td>72%</td>
<td>78%</td>
</tr>
<tr>
<td>Casual-dining</td>
<td>78%</td>
<td>77%</td>
<td>70%</td>
<td>71%</td>
<td>77%</td>
</tr>
<tr>
<td>Fast-casual</td>
<td>76%</td>
<td>71%</td>
<td>65%</td>
<td>67%</td>
<td>74%</td>
</tr>
<tr>
<td>Fast-food:</td>
<td>63%</td>
<td>65%</td>
<td>58%</td>
<td>58%</td>
<td>67%</td>
</tr>
</tbody>
</table>

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

Service Management Group

Alcoholic Beverage Consumption While Dining
Customer satisfaction between patrons who consume alcoholic beverages and those who do not compares as follows:
Satisfied Overall | Likely To Recommend
---|---
Ordered alcoholic beverage: | 74% | 75%
Did not order alcohol: | 70% | 71%

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

Service Management Group

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

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

“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>
<tbody>
<tr>
<td>Corporate-owned locations:</td>
<td>66%</td>
<td>67%</td>
</tr>
<tr>
<td>Franchise-owned locations:</td>
<td>68%</td>
<td>70%</td>
</tr>
</tbody>
</table>

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2020-2021
“Customers visiting franchised quick-service restaurants are slightly more satisfied than customers visiting corporate-owned locations. It seems as though franchisees are better at delivering on metrics that make a difference to customers.”

Service Management Group

**Day-Of-Week**

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

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

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

Service Management Group

**Dining Room vs. Bar Area Dining**

Restaurant patrons compare their table service as follows:

<table>
<thead>
<tr>
<th></th>
<th>Satisfied Overall</th>
<th>Taste of Food</th>
<th>Pace of Meal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dining room:</td>
<td>70%</td>
<td>72%</td>
<td>64%</td>
</tr>
<tr>
<td>Bar area:</td>
<td>75%</td>
<td>72%</td>
<td>70%</td>
</tr>
</tbody>
</table>
“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>Pace of Experience</th>
<th>Overall Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dining room:</td>
<td>74%</td>
</tr>
<tr>
<td>Outdoors:</td>
<td>71%</td>
</tr>
<tr>
<td></td>
<td>69%</td>
</tr>
<tr>
<td></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>Fast-Casual</th>
<th>Quick-Service</th>
<th>Casual-Dining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friendliness: 88%</td>
<td>87%</td>
<td>87%</td>
</tr>
<tr>
<td>Taste:       86%</td>
<td>83%</td>
<td>87%</td>
</tr>
<tr>
<td>Speed:       73%</td>
<td>75%</td>
<td>61%</td>
</tr>
<tr>
<td>Accuracy:    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

<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>Overall Satisfaction</th>
<th>Experienced A Problem</th>
</tr>
</thead>
<tbody>
<tr>
<td>In person:</td>
<td>71%</td>
</tr>
<tr>
<td>Telephone:</td>
<td>69%</td>
</tr>
<tr>
<td>Online or fax:</td>
<td>61%</td>
</tr>
</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:</td>
<td>73%</td>
</tr>
<tr>
<td>QSR:</td>
<td>67%</td>
</tr>
</tbody>
</table>

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

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

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

“Upselling makes customers feel they’re getting special service, boosts ticket prices, and strengthens the likelihood that guests will recommend a restaurant.”
Service Management Group
Trying New Restaurant Brands

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

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

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

Service Management Group

Type Of Service

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

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

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

Service Management Group

21.3 Market Resources
Service Management Group, 1737 McGee Street, Kansas City, MO 64108.
(800) 764-0439. (www.smg.com)
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 (www.foresee.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>
<tr>
<td>2018</td>
<td>81</td>
<td>80</td>
</tr>
</tbody>
</table>

22.3 Customer Satisfaction Scores
ASCI scores from 2018 surveys for restaurant chains and change from 2017 scores are as follows:
Full-Service Restaurants
- Texas Roadhouse: 83 (1.2%)
- Cracker Barrel: 81 (-3.6%)
- LongHorn Steakhouse: 81 (5.2%)
- Olive Garden: 80 (-1.2%)
- Outback Steakhouse: 79 (-1.3%)
- Red Lobster: 79 (-2.5%)
- Red Robin: 79 (8.2%)
- TGI Fridays: 79 (3.9%)
- Applebee’s: 78 (-1.3%)
- Chili’s: 78 (1.3%)
- Ruby Tuesday: 78 (no change)
- Denny’s: 77 (1.3%)
- All Others: 81 (3.8%)
- Sector average: 81 (3.8%)

Limited-Service Restaurants
- Chick-fil-A: 87 (no change)
- Panera Bread: 81 (-1.2%)
- Papa John’s: 80 (-2.4%)
- Pizza Hut: 80 (5.3%)
- Subway: 80 (-1.2%)
- Arby’s: 79 (-1.3%)
- Chipotle Mexican Grill: 79 (no change)
- Domino’s: 79 (1.3%)
- Dunkin’: 78 (-1.3%)
- Starbucks: 78 (1.3%)
- KFC: 77 (-1.3%)
- Little Caesars: 77 (-1.3%)
- Wendy’s: 77 (1.3%)
- Burger King: 76 (-1.3%)
- Jack in the Box: 74 (-1.3%)
- Taco Bell: 74 (-2.6%)
- McDonald’s: 69 (no change)
- All others: 82 (no change)
- Sector average: 80 (1.3%)

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

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

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

Other findings of the study are as follows:
• Italian, Mexican and Chinese are the top three cuisines in terms of familiarity, trial, and frequency of eating.
• Ethiopian, Brazilian/Argentinian, and Korean are the three least known cuisines.
• Cuisines most commonly eaten on-premises in restaurants are sushi, Thai, Vietnamese, Brazilian/Argentinian, Greek, and Southeast Asian.
• Chinese is by far the most common cuisine for restaurant takeout and delivery, followed by Mexican, and Italian.
• Restaurants are the primary point of access for trying new cuisines, as well as 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 now eat a wider variety of ethnic cuisines than they did 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.

Italian, Mexican, Chinese, Pan-Asian, and Japanese cuisine were found in a survey by Mintel (www.mintel.com) to be the most popular ethnic foods. Sixty-seven percent (67%) of respondents to the Mintel survey said authenticity was their top expectation when it comes to ethnic foods. With Chinese cuisine, for instance, there is a shift from Americanized dishes to more authentic Chinese dishes and flavors.

“Some chefs have an uneasy relationship with Americanized Chinese dishes. The evolution continues as chefs contend there’s room for both elevated versions of Americanized dishes and more authentic takes on the complex and ever-evolving cuisine.”

Nation’s Restaurant News, 5/7/18

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

### 23.3 Ethnic Restaurants

According to the U.S. Census Bureau (www.census.gov), 41% of the 232,000 full-service restaurants in the United States are ethnic. By type of cuisine, ethnic restaurants as a percentage of all full-service restaurants, are as 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
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 as follows:

- Breakfast: 22%
- Lunch: 32%
- Dinner: 29%
- Snacks: 17%

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.

24.2 Breakfast

Most people eat breakfast almost everyday. According to The NPD Group, the average annual number of breakfast occasions per person is 361, an increase from 350 in 2010.

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 accounts for 22% of all restaurant visits in the United States and it’s the only daypart enjoying consistent growth, with the number of visits during the morning meal increasing by 1% annually over the past three years.”

Nation’s Restaurant News, 5/20/19
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’: 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. Full-service customers are most interested in variety, all-day breakfast options, and signature meal offerings.
- Coffee is key: 64% of consumers drink coffee at breakfast; 54% of these consumers prefer a restaurant that offers free coffee refills; and 30% say that they are loyal to concepts that serve their preferred brand of java.
- Consumers link breakfast with health: 63% of consumers feel it is unhealthy to skip breakfast; open-ended data shows that many consumers want more healthful breakfast options.

When people eat their morning meal away from home, 48% order a breakfast sandwich, according to Datassential. Also popular are breakfast bowls, which are viewed as among the healthiest morning meal options. Datassential’s MenuTrends reported that breakfast bowls appear on 7% of breakfast menus.

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

<table>
<thead>
<tr>
<th>Pct. Who Have Eaten In Past 2 Weeks</th>
<th>At Home</th>
<th>Away From Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cold cereal:</td>
<td>23%</td>
<td>94%</td>
</tr>
<tr>
<td>Eggs:</td>
<td>23%</td>
<td>77%</td>
</tr>
<tr>
<td>Breakfast sandwich:</td>
<td>11%</td>
<td>52%</td>
</tr>
<tr>
<td>Bacon:</td>
<td>11%</td>
<td>73%</td>
</tr>
<tr>
<td>Sausage:</td>
<td>10%</td>
<td>66%</td>
</tr>
<tr>
<td>Yogurt:</td>
<td>10%</td>
<td>86%</td>
</tr>
<tr>
<td>Oatmeal:</td>
<td>10%</td>
<td>90%</td>
</tr>
<tr>
<td>Fruit/fruit cup:</td>
<td>9%</td>
<td>85%</td>
</tr>
<tr>
<td>Pancakes:</td>
<td>9%</td>
<td>65%</td>
</tr>
<tr>
<td>Bagel:</td>
<td>9%</td>
<td>81%</td>
</tr>
<tr>
<td>Breakfast potatoes:</td>
<td>7%</td>
<td>53%</td>
</tr>
<tr>
<td>Omelet:</td>
<td>6%</td>
<td>67%</td>
</tr>
<tr>
<td>French toast:</td>
<td>6%</td>
<td>77%</td>
</tr>
</tbody>
</table>
24.3 Lunch

Lunch accounts for 32% of restaurant visits, according to The NPD Group, a figure which has been on a slight decline for several years.

The increase in snacking is, in part, the reason for recent declines in lunch traffic at restaurants.

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

Nation’s Restaurant News

The decline is also attributed, in 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. And 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

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. 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%

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

24.4 Dinner

Second only to lunchtime restaurant visits, dinner accounts for 29% of patronage at restaurants. Year-over-year visits, however, have been on the decline for several years.

National Eating Trend, by The NPD Group, found the dinner daypart suffered a per capita drop of 15 fewer restaurant dinners compared to in-home suppers over the past decade.
Dinner accounts for 27% of restaurant sales. But the percentage varies by sector. The daypart accounts for slightly over one-half of casual-dining sales and 64% of fine-dining sales, according to Datassential.

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

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

According to The NPD Group, the demographic most responsible for the decline at dinner is adults ages 35-to-54. Though older consumers have increased their restaurant dinner occasions, they haven’t offset the loses from the cutbacks by their younger counterparts.

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.

Delivery has been a bright spot for restaurant dinner sales, making this the only daypart with growth in 2018.

“In today’s high-tech, hyper-busy, work-at-home, Netflix-bingeing culture, consumers aren’t as interested as previous generations in solving their ‘dinner problem’ by going out to eat. Hence, the years-long decline in visits to restaurants at dinner. Recently, however, operators who are finding a way to solve that problem are experiencing growth. Dinner was the only daypart to grow this year. Helping to drive traffic growth at dinner is delivery, which is used most heavily at dinner, and dinner menu offerings from popular chains.”

Nation’s Restaurant News, 7/23/18
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 Datassential (www.datassential.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.”

Datassential

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>Pct. Who Have Eaten</th>
<th>At Home</th>
<th>Away From Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Past 2 Weeks</td>
<td>31%</td>
<td>69%</td>
</tr>
<tr>
<td>Fries, potato skins</td>
<td>10%</td>
<td>31%</td>
</tr>
<tr>
<td>Chips &amp; salsa</td>
<td>9%</td>
<td>20%</td>
</tr>
<tr>
<td>Wings</td>
<td>8%</td>
<td>33%</td>
</tr>
<tr>
<td>Onion rings</td>
<td>7%</td>
<td>21%</td>
</tr>
<tr>
<td>Fried cheese sticks</td>
<td>6%</td>
<td>31%</td>
</tr>
<tr>
<td>Nachos</td>
<td>6%</td>
<td>39%</td>
</tr>
<tr>
<td>Dip (spinach, taco, etc.)</td>
<td>5%</td>
<td>43%</td>
</tr>
<tr>
<td>Shrimp cocktail</td>
<td>5%</td>
<td>12%</td>
</tr>
<tr>
<td>Spring/egg rolls</td>
<td>4%</td>
<td>13%</td>
</tr>
<tr>
<td>Quesadilla</td>
<td>4%</td>
<td>59%</td>
</tr>
<tr>
<td>Chicken strips</td>
<td>4%</td>
<td>35%</td>
</tr>
<tr>
<td>Hummus</td>
<td>3%</td>
<td>56%</td>
</tr>
<tr>
<td>Calamari</td>
<td>3%</td>
<td>13%</td>
</tr>
<tr>
<td>Cheese ball/cubes/slices</td>
<td>3%</td>
<td>73%</td>
</tr>
<tr>
<td>Guacamole</td>
<td>3%</td>
<td>64%</td>
</tr>
</tbody>
</table>

When restaurant patrons were asked in a survey by Datassential the most important attributes in choosing a restaurant appetizer, responses were as follows:
- Great taste: 84%
- Best value: 72%
- Quality of appetizer options: 72%
- Cost: 72%
- Visually appealing: 69%
- Unique appetizers not generally prepared at home: 61%
- Speed of service: 59%
- Shareable with a group: 55%
- Healthier options: 53%
- Non-fried, non-greasy options: 52%
- Large appetizer portions: 49%
- Meal combo special: 47%
- Signage or menu photos of appetizers: 47%
- Small appetizer portions to avoid filling up: 46%
• More upscale/gourmet appetizers: 44%
• All natural or organic ingredients: 44%
• Nutritional labeling, calorie counts, fat, etc.: 40%
• Limited-time offers: 34%
• Rewards or loyalty program: 33%
• Gluten-free options: 26%

25.3 Dessert

According to The NPD Group (www.npd.com), 10% 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.

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%
  • Quick-service: 84%
  • Casual-dining: 96%
  • 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:
Small plates as entrees 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. Datassential 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*

### 25.5 Salads

*Salad Consumption in the United States*, published in 2018 by the USDA’s Food Surveys Research Group (www.nal.usda.gov/fnic/usda-food-surveys-research-group), reported that on an average day, 20% of Americans aged 1 or older eat salad. Females (23%) are more likely than males (16%) to eat salad on an average day. Among adults ages 20-to-39, 18% eat salad on an average day; 26% of those ages 40 and older do so. Salad consumption also rises with income. Only 13% of people from households with the lowest incomes eat salad on an average day compared with 26% of those from households with the highest incomes.

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*

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*
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

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%

“There’s a lot to be said for the universality of soups. Every culture has them and, despite their reputation as cold-weather food, consumers eat them all year long, according to many restaurateurs. As with many traditional foods, however, chefs are finding ways to tweak traditional soups to make them their own and to appeal to guests who are looking for more vibrant flavors.”

Nation’s Restaurant News, 10/15/18
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MENU ITEMS

26.1 Beef & Pork

According to the U.S. Department of Agriculture (USDA, www.usda.gov), beef and pork consumption were 84 pounds and 67 pounds per capita, respectively, in 2018. Per capita beef consumption decreased 14% during the 2009-2018 decade; pork consumption decreased 1%.

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

The *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%.

Chefs are adding excitement to beef entrees with such items as bavette steak, coulotte, and Denver steaks.

“When it comes to beef, some operators are interested in focusing on underutilized cuts, as well as upgrading meat quality and versatility across the menu. The fastest-growing cut of meat on menus is bavette steak, with 167% growth over the last four years.”

*Nation’s Restaurant News, 5/7/18*

### 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 reported a 47% increase in the sale of breakfast items after it launched all-day breakfast service in 2015. 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.”

_Nation’s Restaurant News_

### 26.3 **Burgers**

According to The NPD Group, 8.6 billion hamburgers are sold at restaurants each year.

“Americans eat a lot of burgers. Of all orders placed at foodservice outlets, 14.2% include a burger.”

_Nation’s Restaurant News, 4/2/18_

Technomic estimates sales of burgers at restaurants at $90 billion.

The _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.

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.

### 26.4 Cake & Pie

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

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

According to Datassential, apple pie is the top menued 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, including options like buttermilk custard, buttermilk chess pie, or à la mode options served with buttermilk ice cream.

### 26.5 Eggs

According to the USDA, egg production in the U.S. has been as follows:

- 2014: 100.9 billion
- 2015: 97.2 billion
- 2016: 102.1 billion
- 2017: 105.7 billion
- 2018: 109.2 billion

The annual value of egg production is approximately $6.5 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’: 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
26.6 Fries
Adults eat approximately 30 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. Americans ordered 10.7 billion servings of fries in restaurants in 2018, according to The NPD Group.

“For decades, French fries have been the most popular side dish in the United States; 18% of all restaurant orders include fries.”

Nation’s Restaurant News, 4/15/19

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, 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%

26.7 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 18.3 million hot dogs were consumed in major league stadiums during the 2019 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 2018 (sources: Nielsen and the National Hot Dog & Sausage Council):

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

**Sausage**
- Los Angeles, CA
- Chicago, IL
- New York, NY
- Dallas/Ft. Worth, TX
- New Orleans, LA
- Houston, TX
- Philadelphia, PA
- Atlanta, GA
- Boston, MA
- 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

**26.8 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 2018. 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. Of pizzas sold by restaurants, 53% are taken to-go and 28% are delivered, according to Datassential; only 19% are eaten in the restaurant.

Online ordering and increased use of mobile devices is changing ordering patterns for pizza delivery outlets.

Restaurants’ 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.

26.9 Poultry
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, as red meat consumption has steadily declined.

The National Chicken Council (www.nationalchickencouncil.org) estimated chicken consumption was 93.1 pounds per capita in 2018, an increase from 92.2 pounds the year prior.

U.S. chicken production in 2018 was 55.5 billion pounds, an all-time record and 2.0% higher than the output in 2017.

The 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.

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, serve wings.
The National Chicken Council (www.nationalchickencouncil.org) estimates that Americans consume 1.25 billion wings on Super Bowl Sunday.

26.10 Sandwiches

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

Technomic assessed that sandwiches, burgers, and other handheld items account for nearly one out of every four dollars spent in the foodservice channel, totaling $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

_________________________________________________________________

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

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

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.

26.11 Seafood

According to the USDA, commercial fish and shellfish consumption is 14.2 pounds per capita. Per capita seafood consumption decreased 4.3% during the past decade.

According to a 2018 report by the National Center for Health Statistics (www.cdc.gov/nchs/), 20% of adults consume seafood at least twice a week. By race/ethnicity, those that do so are as follows:

- Asian: 41%
- African-American: 23%
- Caucasian: 19%
- Hispanic: 14%

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 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.

“As more consumers try to consume less meat, opportunities abound for fish and shellfish to fill the gap. Seafood has wide appeal: 42% of consumers say they’d like to eat more seafood as a replacement for meat.”

Nation’s Restaurant News, 4/15/19

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.

One 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.
27

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).

According to Coca-Cola Company’s DINE360 research, snacks – defined as something purchased for immediate consumption but not breakfast, lunch or dinner – accounted for 11% of all visits to restaurants and food retailers in 2018; 15% of visits were by guests ages 18-to-24.

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.

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 supported by 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 $43.7 billion for 2019, a 4.6% increase over the prior year. Coffee shops (see Chapter 33) account for almost half of the total.

Fifteen (15) snack chains (including ice/cream/frozen desserts and excluding coffeeshops) ranked among Technomic’s list of 250 largest U.S. restaurant chains: Auntie Anne’s, Baskin-Robbins, Braum’s Ice Cream & Dairy Stores, Cinnabon, Cold Stone Creamery, Dairy Queen/Orange Julius, Dunkin’, Great American Cookies, Jamba Juice, Krispy Kreme, Menchie’s Frozen Yogurt, Smoothie King, Tropical Smoothie Cafe, Wetzel’s Pretzels, and Yogurtland. Their combined sales were $17.2 billion; they operated 23,949 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 DINE360, customers spent less than 10 minutes at the outlet where they bought their food for 40% of those snacking occasions.

_________________________________________________________________

“Snacks have to be fast, and it helps if they’re fun, approachable and don’t require a lot of thought.”

Nation’s Restaurant News, 9/24/18

_________________________________________________________________
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. Morning snacks represent 23% of the snack market and evening snacks account for 30% of snack occasions.”

*Nation’s Restaurant News*
Snacking behaviors also vary seasonally. Driven by Halloween treats, sweet snack consumption spikes in November. Better-for-you snacking decreases in November and December. 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*

The most popular restaurant snacks by daypart are as follows (sources: *Nation’s Restaurant News* 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

**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
DINING OUT

28.1 Restaurant Visits
The Media Audit (www.themediaaudit.com) surveyed 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, The Media Audit found that 12.2% of adults dine out at full-service restaurants two or more times per week.

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

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

### 28.3 Quick-Service Restaurant Visits

Across all metropolitan areas, The Media Audit 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 Quick-Service 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>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>
</tbody>
</table>
• Kansas City, MO: 2.61
• Las Vegas, NV: 2.60
• Lexington, KY: 3.26
• Little Rock, AR: 2.80
• Los Angeles, CA: 2.78
• Louisville, KY: 3.15
• Madison, WI: 2.20
• Melbourne-Cocoa, FL: 2.57
• Memphis, TN: 2.91
• Miami-Ft. Lauderdale, FL: 2.61
• Milwaukee-Racine, WI: 2.12
• Minneapolis-Saint Paul, MN: 2.10
• Nashville, TN: 3.04
• New Orleans, LA: 2.19
• New York, NY: 2.61
• Ocala, FL: 2.02
• Oklahoma City, OK: 2.92
• Omaha-Council Bluffs, NE: 2.83
• Orange County, CA: 2.76
• Orlando, FL: 3.49
• Peoria, IL: 2.31
• Philadelphia, PA: 2.37
• Phoenix, AZ: 2.83
• Pittsburgh, PA: 2.09
• Portland, OR: 2.52
• Raleigh-Durham, NC: 3.18
• Reno, NV: 2.29
• Richmond, VA: 2.82
• Riverside-San Bernardino, CA: 2.16
• Rochester, NY: 2.87
• Sacramento, CA: 2.61
• Salt Lake City, UT: 2.53
• San Antonio, TX: 2.82
• San Diego, CA: 2.64
• San Francisco, CA: 2.22
• San Jose, CA: 2.46
• Seattle-Tacoma, WA: 2.40
• Southern New Hampshire: 2.21
• Spokane, WA: 2.15
• Springfield, MO: 2.23
• St. Louis, MO: 2.50
• Syracuse, NY: 2.23
• Tampa-St. Petersburg, FL: 2.48
• Toledo, OH: 2.25
• Tucson, AZ: 2.53
• Tulsa, OK: 3.43
• Washington, DC: 2.48
• West Palm Beach, FL: 2.21

28.4 Market Resources
The Media Audit, 1400 Broadfield Boulevard, Suite 200, Houston, TX 77084.
(713) 626-0333. (www.themediaaudit.com)
29

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 (sources: Nielsen and 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>
</tbody>
</table>

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2020-2021

• 139 •
<table>
<thead>
<tr>
<th>City</th>
<th>Sales (M)</th>
<th>Change (%)</th>
<th>Sales Growth (M)</th>
<th>Total Sales (M)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alma, MI</td>
<td>$924</td>
<td>4.79%</td>
<td>72</td>
<td>$536,903</td>
</tr>
<tr>
<td>Alpena, MI</td>
<td>$3,074</td>
<td>13.21%</td>
<td>187</td>
<td>$474,417</td>
</tr>
<tr>
<td>Altoona, PA</td>
<td>$1,913</td>
<td>8.06%</td>
<td>296</td>
<td>$811,666</td>
</tr>
<tr>
<td>Altus, OK</td>
<td>$2,155</td>
<td>9.50%</td>
<td>130</td>
<td>$429,215</td>
</tr>
<tr>
<td>Amarillo, TX</td>
<td>$1,833</td>
<td>7.48%</td>
<td>640</td>
<td>$756,998</td>
</tr>
<tr>
<td>Americus, GA</td>
<td>$1,247</td>
<td>6.55%</td>
<td>75</td>
<td>$598,613</td>
</tr>
<tr>
<td>Ames, IA</td>
<td>$1,580</td>
<td>6.31%</td>
<td>193</td>
<td>$766,342</td>
</tr>
<tr>
<td>Amsterdam, NY</td>
<td>$1,331</td>
<td>5.62%</td>
<td>101</td>
<td>$656,267</td>
</tr>
<tr>
<td>Anchorage, AK</td>
<td>$2,824</td>
<td>7.88%</td>
<td>1,272</td>
<td>$893,322</td>
</tr>
<tr>
<td>Andrews, TX</td>
<td>$2,160</td>
<td>7.19%</td>
<td>66</td>
<td>$577,121</td>
</tr>
<tr>
<td>Angola, IN</td>
<td>$2,036</td>
<td>8.17%</td>
<td>103</td>
<td>$682,670</td>
</tr>
<tr>
<td>Ann Arbor, MI</td>
<td>$1,741</td>
<td>5.26%</td>
<td>847</td>
<td>$737,104</td>
</tr>
<tr>
<td>Anniston-Jacksonville, AL</td>
<td>$1,717</td>
<td>8.24%</td>
<td>231</td>
<td>$861,784</td>
</tr>
<tr>
<td>Appleton, WI</td>
<td>$1,622</td>
<td>5.40%</td>
<td>545</td>
<td>$690,015</td>
</tr>
<tr>
<td>Arcadia, FL</td>
<td>$969</td>
<td>6.65%</td>
<td>49</td>
<td>$683,082</td>
</tr>
<tr>
<td>Ardmore, OK</td>
<td>$1,620</td>
<td>6.96%</td>
<td>144</td>
<td>$551,104</td>
</tr>
<tr>
<td>Arkadelphia, AR</td>
<td>$2,581</td>
<td>13.04%</td>
<td>93</td>
<td>$627,452</td>
</tr>
<tr>
<td>Arkansas City-Winfield, KS</td>
<td>$1,083</td>
<td>5.06%</td>
<td>70</td>
<td>$559,486</td>
</tr>
<tr>
<td>Asheville, NC</td>
<td>$1,791</td>
<td>7.06%</td>
<td>1,044</td>
<td>$761,134</td>
</tr>
<tr>
<td>Ashland, OH</td>
<td>$1,101</td>
<td>5.11%</td>
<td>78</td>
<td>$746,205</td>
</tr>
<tr>
<td>Ashtabula, OH</td>
<td>$1,075</td>
<td>5.69%</td>
<td>211</td>
<td>$504,299</td>
</tr>
<tr>
<td>Astoria, OR</td>
<td>$4,005</td>
<td>15.25%</td>
<td>310</td>
<td>$483,126</td>
</tr>
<tr>
<td>Atchison, KS</td>
<td>$1,182</td>
<td>5.32%</td>
<td>37</td>
<td>$532,541</td>
</tr>
<tr>
<td>Athens-Clarke County, GA</td>
<td>$2,010</td>
<td>8.72%</td>
<td>500</td>
<td>$805,174</td>
</tr>
<tr>
<td>Athens, OH</td>
<td>$1,544</td>
<td>8.22%</td>
<td>151</td>
<td>$661,132</td>
</tr>
<tr>
<td>Athens, TN</td>
<td>$2,058</td>
<td>10.16%</td>
<td>158</td>
<td>$681,171</td>
</tr>
<tr>
<td>Athens, TX</td>
<td>$1,409</td>
<td>6.82%</td>
<td>193</td>
<td>$580,668</td>
</tr>
<tr>
<td>Atlanta-Sandy Springs, GA</td>
<td>$1,733</td>
<td>6.10%</td>
<td>12,961</td>
<td>$752,521</td>
</tr>
<tr>
<td>Atlantic City-Hammonton, NJ</td>
<td>$3,083</td>
<td>12.10%</td>
<td>830</td>
<td>$1,027,183</td>
</tr>
<tr>
<td>Auburn-Opelika, AL</td>
<td>$1,507</td>
<td>6.06%</td>
<td>327</td>
<td>$718,471</td>
</tr>
<tr>
<td>Auburn, IN</td>
<td>$1,385</td>
<td>6.30%</td>
<td>87</td>
<td>$673,862</td>
</tr>
<tr>
<td>Auburn, NY</td>
<td>$1,894</td>
<td>7.21%</td>
<td>166</td>
<td>$904,404</td>
</tr>
<tr>
<td>Augusta, GA-SC</td>
<td>$1,688</td>
<td>6.82%</td>
<td>1,284</td>
<td>$771,554</td>
</tr>
<tr>
<td>Augusta-Waterville, ME</td>
<td>$3,186</td>
<td>12.00%</td>
<td>539</td>
<td>$712,705</td>
</tr>
<tr>
<td>Austin, MN</td>
<td>$1,115</td>
<td>4.46%</td>
<td>62</td>
<td>$710,661</td>
</tr>
<tr>
<td>Austin-Round Rock, TX</td>
<td>$1,805</td>
<td>5.68%</td>
<td>4,365</td>
<td>$797,408</td>
</tr>
<tr>
<td>Bainbridge, GA</td>
<td>$1,392</td>
<td>8.21%</td>
<td>65</td>
<td>$581,369</td>
</tr>
<tr>
<td>Bakersfield, CA</td>
<td>$1,373</td>
<td>6.94%</td>
<td>1,469</td>
<td>$821,786</td>
</tr>
<tr>
<td>Baltimore-Columbia, MD</td>
<td>$1,898</td>
<td>5.21%</td>
<td>6,091</td>
<td>$871,668</td>
</tr>
<tr>
<td>Bangor, ME</td>
<td>$3,677</td>
<td>16.20%</td>
<td>790</td>
<td>$712,394</td>
</tr>
<tr>
<td>Baraboo, WI</td>
<td>$2,881</td>
<td>11.03%</td>
<td>243</td>
<td>$756,564</td>
</tr>
<tr>
<td>Bardstown, KY</td>
<td>$1,166</td>
<td>5.06%</td>
<td>74</td>
<td>$707,959</td>
</tr>
<tr>
<td>Barnstable Town, MA</td>
<td>$4,113</td>
<td>11.33%</td>
<td>1,036</td>
<td>$852,496</td>
</tr>
<tr>
<td>Barre, VT</td>
<td>$2,196</td>
<td>6.79%</td>
<td>214</td>
<td>$607,280</td>
</tr>
<tr>
<td>City</td>
<td>Revenue</td>
<td>Growth</td>
<td>Population</td>
<td>Market Value</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------</td>
<td>--------</td>
<td>------------</td>
<td>--------------</td>
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<tr>
<td>Bartlesville, OK</td>
<td>$1,253</td>
<td>4.21%</td>
<td>102</td>
<td>$ 634,196</td>
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<tr>
<td>Bastrop, LA</td>
<td>$2,338</td>
<td>13.28%</td>
<td>97</td>
<td>$ 641,485</td>
</tr>
<tr>
<td>Batavia, NY</td>
<td>$2,502</td>
<td>9.58%</td>
<td>143</td>
<td>$1,031,881</td>
</tr>
<tr>
<td>Batesville, AR</td>
<td>$1,569</td>
<td>8.64%</td>
<td>121</td>
<td>$ 480,727</td>
</tr>
<tr>
<td>Baton Rouge, LA</td>
<td>$1,718</td>
<td>6.37%</td>
<td>1,593</td>
<td>$ 893,370</td>
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<tr>
<td>Battle Creek, MI</td>
<td>$1,392</td>
<td>6.55%</td>
<td>241</td>
<td>$ 720,753</td>
</tr>
<tr>
<td>Bay City, MI</td>
<td>$2,595</td>
<td>11.06%</td>
<td>368</td>
<td>$ 751,207</td>
</tr>
<tr>
<td>Bay City, TX</td>
<td>$1,343</td>
<td>5.59%</td>
<td>85</td>
<td>$ 586,588</td>
</tr>
<tr>
<td>Beatrice, NE</td>
<td>$2,249</td>
<td>8.20%</td>
<td>352</td>
<td>$ 720,028</td>
</tr>
<tr>
<td>Beaumont-Port Arthur, TX</td>
<td>$1,708</td>
<td>7.29%</td>
<td>880</td>
<td>$ 794,107</td>
</tr>
<tr>
<td>Beaver Dam, WI</td>
<td>$ 738</td>
<td>3.01%</td>
<td>123</td>
<td>$ 528,260</td>
</tr>
<tr>
<td>Beckley, WV</td>
<td>$2,049</td>
<td>9.20%</td>
<td>352</td>
<td>$ 720,028</td>
</tr>
<tr>
<td>Bedford, IN</td>
<td>$1,279</td>
<td>5.41%</td>
<td>66</td>
<td>$ 883,924</td>
</tr>
<tr>
<td>Beeville, TX</td>
<td>$1,884</td>
<td>11.61%</td>
<td>113</td>
<td>$ 552,186</td>
</tr>
<tr>
<td>Bellefontaine, OH</td>
<td>$1,312</td>
<td>5.41%</td>
<td>121</td>
<td>$ 492,380</td>
</tr>
<tr>
<td>Bellingham, WA</td>
<td>$1,595</td>
<td>5.85%</td>
<td>511</td>
<td>$ 655,830</td>
</tr>
<tr>
<td>Bemidji, MN</td>
<td>$2,124</td>
<td>8.95%</td>
<td>135</td>
<td>$ 729,830</td>
</tr>
<tr>
<td>Bend-Redmond, OR</td>
<td>$1,707</td>
<td>6.69%</td>
<td>428</td>
<td>$ 670,028</td>
</tr>
<tr>
<td>Bennettsville, SC</td>
<td>$1,924</td>
<td>12.24%</td>
<td>90</td>
<td>$ 591,411</td>
</tr>
<tr>
<td>Bennington, VT</td>
<td>$2,071</td>
<td>6.86%</td>
<td>146</td>
<td>$ 518,315</td>
</tr>
<tr>
<td>Berlin, NH-VT</td>
<td>$5,225</td>
<td>22.23%</td>
<td>314</td>
<td>$ 628,628</td>
</tr>
<tr>
<td>Big Rapids, MI</td>
<td>$2,019</td>
<td>9.96%</td>
<td>121</td>
<td>$ 718,306</td>
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<tr>
<td>Big Spring, TX</td>
<td>$1,111</td>
<td>5.48%</td>
<td>63</td>
<td>$ 666,444</td>
</tr>
<tr>
<td>Big Stone Gap, VA</td>
<td>$3,515</td>
<td>17.78%</td>
<td>322</td>
<td>$ 649,193</td>
</tr>
<tr>
<td>Billings, MT</td>
<td>$2,558</td>
<td>9.33%</td>
<td>609</td>
<td>$ 708,524</td>
</tr>
<tr>
<td>Binghamton, NY</td>
<td>$2,336</td>
<td>8.76%</td>
<td>684</td>
<td>$ 839,991</td>
</tr>
<tr>
<td>Birmingham-Hoover, AL</td>
<td>$1,408</td>
<td>5.49%</td>
<td>2,366</td>
<td>$ 682,485</td>
</tr>
<tr>
<td>Bismarck, ND</td>
<td>$1,610</td>
<td>4.62%</td>
<td>284</td>
<td>$ 730,521</td>
</tr>
<tr>
<td>Blackfoot, ID</td>
<td>$ 761</td>
<td>3.65%</td>
<td>64</td>
<td>$ 535,453</td>
</tr>
<tr>
<td>Blacksburg, VA</td>
<td>$2,344</td>
<td>9.78%</td>
<td>490</td>
<td>$ 873,355</td>
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<tr>
<td>Bloomington, IL</td>
<td>$2,422</td>
<td>7.76%</td>
<td>392</td>
<td>$1,197,796</td>
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<td>Bloomington, IN</td>
<td>$2,059</td>
<td>8.88%</td>
<td>323</td>
<td>$1,046,495</td>
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<td>Bloomsburg-Berwick, PA</td>
<td>$1,497</td>
<td>5.70%</td>
<td>171</td>
<td>$ 746,503</td>
</tr>
<tr>
<td>Bluefield, WV-VA</td>
<td>$1,853</td>
<td>8.59%</td>
<td>259</td>
<td>$ 756,398</td>
</tr>
<tr>
<td>Blytheville, AR</td>
<td>$1,112</td>
<td>5.38%</td>
<td>103</td>
<td>$ 472,942</td>
</tr>
<tr>
<td>Bogalusa, LA</td>
<td>$ 957</td>
<td>5.39%</td>
<td>73</td>
<td>$ 602,753</td>
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<tr>
<td>Boise City, ID</td>
<td>$1,355</td>
<td>5.89%</td>
<td>1,318</td>
<td>$ 685,913</td>
</tr>
<tr>
<td>Boone, IA</td>
<td>$ 855</td>
<td>3.01%</td>
<td>44</td>
<td>$ 513,773</td>
</tr>
<tr>
<td>Boone, NC</td>
<td>$3,638</td>
<td>17.30%</td>
<td>231</td>
<td>$ 840,619</td>
</tr>
<tr>
<td>Borger, TX</td>
<td>$1,334</td>
<td>4.88%</td>
<td>54</td>
<td>$ 545,500</td>
</tr>
<tr>
<td>Boston-Cambridge, MA-NH</td>
<td>$2,028</td>
<td>5.18%</td>
<td>11,947</td>
<td>$ 805,043</td>
</tr>
<tr>
<td>Boulder, CO</td>
<td>$2,231</td>
<td>5.63%</td>
<td>895</td>
<td>$ 791,415</td>
</tr>
<tr>
<td>Bowling Green, KY</td>
<td>$2,079</td>
<td>10.05%</td>
<td>374</td>
<td>$ 921,305</td>
</tr>
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<td>Bozeman, MT</td>
<td>$2,481</td>
<td>7.88%</td>
<td>355</td>
<td>$ 680,549</td>
</tr>
<tr>
<td>Location</td>
<td>Average Check</td>
<td>Average Tip %</td>
<td>Tip Amount</td>
<td>Average Check - Tip Amount</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>---------------</td>
<td>----------------</td>
<td>------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>Bradford, PA</td>
<td>$1,593</td>
<td>7.52%</td>
<td>114</td>
<td>$456,523</td>
</tr>
<tr>
<td>Brainerd, MN</td>
<td>$3,069</td>
<td>11.61%</td>
<td>114</td>
<td>$755,337</td>
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<td>Branson, MO</td>
<td>$3,373</td>
<td>16.72%</td>
<td>114</td>
<td>$789,255</td>
</tr>
<tr>
<td>Breckenridge, CO</td>
<td>$4,945</td>
<td>14.82%</td>
<td>114</td>
<td>$682,450</td>
</tr>
<tr>
<td>Bremerton-Silverdale, WA</td>
<td>$1,494</td>
<td>5.03%</td>
<td>114</td>
<td>$681,753</td>
</tr>
<tr>
<td>Brenham, TX</td>
<td>$1,801</td>
<td>7.22%</td>
<td>114</td>
<td>$613,775</td>
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<td>Brevard, NC</td>
<td>$1,196</td>
<td>4.52%</td>
<td>114</td>
<td>$542,356</td>
</tr>
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<td>Bridgeport-Stamford, CT</td>
<td>$2,015</td>
<td>4.44%</td>
<td>114</td>
<td>$708,578</td>
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<td>Brookhaven, MS</td>
<td>$1,793</td>
<td>9.06%</td>
<td>114</td>
<td>$798,564</td>
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<tr>
<td>Brookings, OR</td>
<td>$1,662</td>
<td>6.82%</td>
<td>114</td>
<td>$489,013</td>
</tr>
<tr>
<td>Brookings, SD</td>
<td>$2,274</td>
<td>9.55%</td>
<td>114</td>
<td>$686,126</td>
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<td>Brownsville-Harlingen, TX</td>
<td>$1,347</td>
<td>9.47%</td>
<td>114</td>
<td>$710,875</td>
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<tr>
<td>Brownwood, TX</td>
<td>$2,163</td>
<td>9.82%</td>
<td>114</td>
<td>$572,096</td>
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<td>Brunswick, GA</td>
<td>$1,200</td>
<td>9.65%</td>
<td>114</td>
<td>$743,449</td>
</tr>
<tr>
<td>Bucyrus, OH</td>
<td>$1,162</td>
<td>6.12%</td>
<td>114</td>
<td>$643,022</td>
</tr>
<tr>
<td>Buffalo-Cheektowaga, NY</td>
<td>$2,467</td>
<td>8.59%</td>
<td>114</td>
<td>$1,087,416</td>
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<td>Burley, ID</td>
<td>$1,140</td>
<td>4.88%</td>
<td>114</td>
<td>$496,522</td>
</tr>
<tr>
<td>Burlington, IA-IL</td>
<td>$2,033</td>
<td>7.92%</td>
<td>114</td>
<td>$661,781</td>
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<td>Burlington, NC</td>
<td>$1,965</td>
<td>8.63%</td>
<td>114</td>
<td>$894,792</td>
</tr>
<tr>
<td>Burlington-South Burlington, VT</td>
<td>$1,366</td>
<td>4.98%</td>
<td>114</td>
<td>$613,075</td>
</tr>
<tr>
<td>Butte-Silver Bow, MT</td>
<td>$2,286</td>
<td>9.19%</td>
<td>114</td>
<td>$534,932</td>
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<tr>
<td>Cadillac, MI</td>
<td>$2,026</td>
<td>9.57%</td>
<td>114</td>
<td>$549,494</td>
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<td>Calhoun, GA</td>
<td>$1,366</td>
<td>7.01%</td>
<td>114</td>
<td>$772,030</td>
</tr>
<tr>
<td>California-Lexington Park, MD</td>
<td>$1,863</td>
<td>4.84%</td>
<td>114</td>
<td>$936,281</td>
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<td>Cambridge, MD</td>
<td>$1,794</td>
<td>7.14%</td>
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<td>$698,321</td>
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<td>Cambridge, OH</td>
<td>$1,335</td>
<td>5.98%</td>
<td>114</td>
<td>$604,425</td>
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<td>Camden, AR</td>
<td>$985</td>
<td>4.78%</td>
<td>114</td>
<td>$405,319</td>
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<tr>
<td>Campbellsville, KY</td>
<td>$2,639</td>
<td>14.10%</td>
<td>114</td>
<td>$591,227</td>
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<tr>
<td>Canon City, CO</td>
<td>$1,731</td>
<td>9.24%</td>
<td>114</td>
<td>$577,893</td>
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<td>Canton-Massillon, OH</td>
<td>$1,382</td>
<td>5.84%</td>
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<td>$709,880</td>
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<td>Canton, IL</td>
<td>$1,687</td>
<td>7.49%</td>
<td>114</td>
<td>$624,485</td>
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<td>Cape Coral-Fort Myers, FL</td>
<td>$2,006</td>
<td>7.53%</td>
<td>114</td>
<td>$908,996</td>
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<td>Cape Girardeau, MO-IL</td>
<td>$2,275</td>
<td>10.24%</td>
<td>114</td>
<td>$827,929</td>
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<td>Carbondale-Marion, IL</td>
<td>$3,188</td>
<td>13.62%</td>
<td>114</td>
<td>$891,024</td>
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<tr>
<td>Carlsbad-Artesia, NM</td>
<td>$1,230</td>
<td>4.80%</td>
<td>114</td>
<td>$725,000</td>
</tr>
<tr>
<td>Carson City, NV</td>
<td>$3,107</td>
<td>12.24%</td>
<td>114</td>
<td>$1,241,489</td>
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<tr>
<td>Casper, WY</td>
<td>$2,151</td>
<td>7.44%</td>
<td>114</td>
<td>$1,010,860</td>
</tr>
<tr>
<td>Cedar City, UT</td>
<td>$2,090</td>
<td>11.19%</td>
<td>114</td>
<td>$549,317</td>
</tr>
<tr>
<td>Cedar Rapids, IA</td>
<td>$1,392</td>
<td>4.53%</td>
<td>114</td>
<td>$644,367</td>
</tr>
<tr>
<td>Cedartown, GA</td>
<td>$1,301</td>
<td>6.96%</td>
<td>114</td>
<td>$713,467</td>
</tr>
<tr>
<td>Celina, OH</td>
<td>$1,042</td>
<td>4.36%</td>
<td>114</td>
<td>$544,231</td>
</tr>
<tr>
<td>Centralia, IL</td>
<td>$1,570</td>
<td>6.67%</td>
<td>114</td>
<td>$675,191</td>
</tr>
<tr>
<td>Centralia, WA</td>
<td>$1,328</td>
<td>5.92%</td>
<td>114</td>
<td>$592,427</td>
</tr>
<tr>
<td>Chambersburg-Waynesboro, PA</td>
<td>$1,377</td>
<td>5.38%</td>
<td>114</td>
<td>$755,348</td>
</tr>
<tr>
<td>City</td>
<td>Population</td>
<td>Weekly Sales</td>
<td>Weekly Sales Increase</td>
<td>Total Sales</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------</td>
<td>--------------</td>
<td>-----------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Champaign-Urbana, IL</td>
<td>$2,345</td>
<td>8.54%</td>
<td>605</td>
<td>$ 917,813</td>
</tr>
<tr>
<td>Charleston, WV</td>
<td>$1,848</td>
<td>6.60%</td>
<td>611</td>
<td>$ 676,039</td>
</tr>
<tr>
<td>Charleston-Mattoon, IL</td>
<td>$2,939</td>
<td>12.94%</td>
<td>206</td>
<td>$ 920,617</td>
</tr>
<tr>
<td>Charleston-N. Charleston, SC</td>
<td>$1,763</td>
<td>6.45%</td>
<td>1,778</td>
<td>$ 728,294</td>
</tr>
<tr>
<td>Charlotte-Concord, NC-SC</td>
<td>$1,620</td>
<td>5.75%</td>
<td>4,929</td>
<td>$ 782,309</td>
</tr>
<tr>
<td>Cheyenne, WY</td>
<td>$2,166</td>
<td>7.11%</td>
<td>177</td>
<td>$ 1,197,605</td>
</tr>
<tr>
<td>Chicago, IL-IN-WI</td>
<td>$1,821</td>
<td>5.92%</td>
<td>22,069</td>
<td>$ 789,696</td>
</tr>
<tr>
<td>Chico, CA</td>
<td>$1,939</td>
<td>8.15%</td>
<td>467</td>
<td>$ 929,062</td>
</tr>
<tr>
<td>Chillicothe, OH</td>
<td>$1,711</td>
<td>7.76%</td>
<td>168</td>
<td>$ 795,821</td>
</tr>
<tr>
<td>Cincinnati, OH-KY-IN</td>
<td>$1,653</td>
<td>5.76%</td>
<td>4,484</td>
<td>$ 791,719</td>
</tr>
<tr>
<td>Claremont-Lebanon, NH-VT</td>
<td>$1,519</td>
<td>4.74%</td>
<td>566</td>
<td>$ 585,511</td>
</tr>
<tr>
<td>Clarksburg, WV</td>
<td>$2,037</td>
<td>8.44%</td>
<td>325</td>
<td>$ 590,668</td>
</tr>
<tr>
<td>Clarksdale, MS</td>
<td>$1,525</td>
<td>9.66%</td>
<td>60</td>
<td>$ 625,500</td>
</tr>
<tr>
<td>Clarksville, TN-KY</td>
<td>$1,481</td>
<td>6.81%</td>
<td>575</td>
<td>$ 708,529</td>
</tr>
<tr>
<td>Clearlake, CA</td>
<td>$ 949</td>
<td>4.66%</td>
<td>119</td>
<td>$ 511,857</td>
</tr>
<tr>
<td>Cleveland, MS</td>
<td>$1,615</td>
<td>9.05%</td>
<td>82</td>
<td>$ 670,890</td>
</tr>
<tr>
<td>Cleveland, TN</td>
<td>$2,214</td>
<td>11.23%</td>
<td>347</td>
<td>$ 764,458</td>
</tr>
<tr>
<td>Cleveland-Elyria, OH</td>
<td>$1,491</td>
<td>5.37%</td>
<td>4,457</td>
<td>$ 689,630</td>
</tr>
<tr>
<td>Clewiston, FL</td>
<td>$1,256</td>
<td>8.07%</td>
<td>76</td>
<td>$ 615,079</td>
</tr>
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<td>Clinton, IA</td>
<td>$1,652</td>
<td>6.06%</td>
<td>136</td>
<td>$ 583,103</td>
</tr>
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<td>Clovis, NM</td>
<td>$1,778</td>
<td>7.87%</td>
<td>113</td>
<td>$ 803,973</td>
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<td>Coeur d’Alene, ID</td>
<td>$1,628</td>
<td>6.93%</td>
<td>389</td>
<td>$ 614,653</td>
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<td>Coffeyville, KS</td>
<td>$1,628</td>
<td>7.81%</td>
<td>103</td>
<td>$ 536,816</td>
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<td>Coldwater, MI</td>
<td>$1,159</td>
<td>5.49%</td>
<td>68</td>
<td>$ 736,838</td>
</tr>
<tr>
<td>College Station-Bryan, TX</td>
<td>$2,090</td>
<td>8.98%</td>
<td>604</td>
<td>$ 840,599</td>
</tr>
<tr>
<td>Colorado Springs, CO</td>
<td>$1,594</td>
<td>5.43%</td>
<td>1,320</td>
<td>$ 839,501</td>
</tr>
<tr>
<td>Columbia, MO</td>
<td>$2,221</td>
<td>8.15%</td>
<td>461</td>
<td>$ 840,130</td>
</tr>
<tr>
<td>Columbia, SC</td>
<td>$1,518</td>
<td>6.04%</td>
<td>1,540</td>
<td>$ 795,064</td>
</tr>
<tr>
<td>Columbus, GA-AL</td>
<td>$1,653</td>
<td>6.87%</td>
<td>703</td>
<td>$ 767,127</td>
</tr>
<tr>
<td>Columbus, IN</td>
<td>$1,940</td>
<td>6.60%</td>
<td>167</td>
<td>$ 938,329</td>
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<td>Columbus, MS</td>
<td>$2,515</td>
<td>11.23%</td>
<td>202</td>
<td>$ 748,356</td>
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<tr>
<td>Columbus, NE</td>
<td>$1,621</td>
<td>5.75%</td>
<td>90</td>
<td>$ 585,978</td>
</tr>
<tr>
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<td>$1,628</td>
<td>5.54%</td>
<td>4,299</td>
<td>$ 756,722</td>
</tr>
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<td>Concord, NH</td>
<td>$1,429</td>
<td>4.63%</td>
<td>291</td>
<td>$ 722,773</td>
</tr>
<tr>
<td>Connersville, IN</td>
<td>$1,669</td>
<td>8.97%</td>
<td>64</td>
<td>$ 617,063</td>
</tr>
<tr>
<td>Cookeville, TN</td>
<td>$2,054</td>
<td>10.27%</td>
<td>315</td>
<td>$ 701,857</td>
</tr>
<tr>
<td>Coos Bay, OR</td>
<td>$1,247</td>
<td>5.64%</td>
<td>161</td>
<td>$ 483,857</td>
</tr>
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<td>$2,766</td>
<td>14.09%</td>
<td>82</td>
<td>$ 776,805</td>
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<td>Corinth, MS</td>
<td>$2,835</td>
<td>13.97%</td>
<td>144</td>
<td>$ 736,382</td>
</tr>
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<td>Cornelia, GA</td>
<td>$2,794</td>
<td>14.36%</td>
<td>216</td>
<td>$ 559,981</td>
</tr>
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<td>Corning, NY</td>
<td>$2,040</td>
<td>8.27%</td>
<td>266</td>
<td>$ 753,823</td>
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<tr>
<td>Corpus Christi, TX</td>
<td>$1,736</td>
<td>6.70%</td>
<td>990</td>
<td>$ 787,457</td>
</tr>
<tr>
<td>Location</td>
<td>Average Growth Rate</td>
<td>Percentage Change</td>
<td>Sales Dollars</td>
<td></td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>---------------------</td>
<td>------------------</td>
<td>---------------</td>
<td></td>
</tr>
<tr>
<td>Corsicana, TX</td>
<td>$1,547</td>
<td>7.29%</td>
<td>$593,213</td>
<td></td>
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<tr>
<td>Cortland, NY</td>
<td>$2,008</td>
<td>8.12%</td>
<td>$849,296</td>
<td></td>
</tr>
<tr>
<td>Corvallis, OR</td>
<td>$1,553</td>
<td>5.51%</td>
<td>$673,246</td>
<td></td>
</tr>
<tr>
<td>Coshocton, OH</td>
<td>$1,469</td>
<td>6.62%</td>
<td>$633,447</td>
<td></td>
</tr>
<tr>
<td>Craig, CO</td>
<td>$2,159</td>
<td>8.29%</td>
<td>$538,863</td>
<td></td>
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<tr>
<td>Crawfordsville, IN</td>
<td>$1,488</td>
<td>6.89%</td>
<td>$699,617</td>
<td></td>
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<tr>
<td>Crescent City, CA</td>
<td>$1,496</td>
<td>6.81%</td>
<td>$765,463</td>
<td></td>
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<tr>
<td>Crestview, FL</td>
<td>$3,262</td>
<td>11.81%</td>
<td>$925,654</td>
<td></td>
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<tr>
<td>Crossville, TN</td>
<td>$1,315</td>
<td>6.38%</td>
<td>$636,858</td>
<td></td>
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<tr>
<td>Cullman, AL</td>
<td>$1,156</td>
<td>5.82%</td>
<td>$721,754</td>
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<tr>
<td>Cullowhee, NC</td>
<td>$3,804</td>
<td>18.77%</td>
<td>$677,253</td>
<td></td>
</tr>
<tr>
<td>Cumberland, MD-WV</td>
<td>$1,671</td>
<td>8.05%</td>
<td>$854,694</td>
<td></td>
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<tr>
<td>Dallas-Fort Worth-Arlington, TX</td>
<td>$1,765</td>
<td>6.15%</td>
<td>$803,389</td>
<td></td>
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<tr>
<td>Dalton, GA</td>
<td>$1,315</td>
<td>7.65%</td>
<td>$732,318</td>
<td></td>
</tr>
<tr>
<td>Danville, IL</td>
<td>$1,676</td>
<td>7.43%</td>
<td>$867,149</td>
<td></td>
</tr>
<tr>
<td>Danville, KY</td>
<td>$2,004</td>
<td>10.02%</td>
<td>$713,793</td>
<td></td>
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<tr>
<td>Danville, VA</td>
<td>$1,580</td>
<td>7.16%</td>
<td>$774,614</td>
<td></td>
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<tr>
<td>Daphne-Fairhope-Foley, AL</td>
<td>$2,273</td>
<td>8.12%</td>
<td>$704,713</td>
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<tr>
<td>Davenport-Moline, IA-IL</td>
<td>$1,796</td>
<td>6.19%</td>
<td>$777,622</td>
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<tr>
<td>Dayton, OH</td>
<td>$1,696</td>
<td>6.63%</td>
<td>$831,073</td>
<td></td>
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<tr>
<td>Dayton, TN</td>
<td>$1,428</td>
<td>7.24%</td>
<td>$565,133</td>
<td></td>
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<tr>
<td>Decatur, AL</td>
<td>$1,520</td>
<td>6.67%</td>
<td>$716,812</td>
<td></td>
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<tr>
<td>Decatur, IL</td>
<td>$2,111</td>
<td>8.10%</td>
<td>$1,049,055</td>
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<td>Decatur, IN</td>
<td>$1,899</td>
<td>9.01%</td>
<td>$906,041</td>
<td></td>
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<tr>
<td>Defiance, OH</td>
<td>$3,078</td>
<td>12.42%</td>
<td>$638,592</td>
<td></td>
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<tr>
<td>Del Rio, TX</td>
<td>$1,167</td>
<td>6.18%</td>
<td>$618,362</td>
<td></td>
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<tr>
<td>Deltona-Daytona Beach, FL</td>
<td>$1,950</td>
<td>8.34%</td>
<td>$916,883</td>
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<tr>
<td>Deming, NM</td>
<td>$1,100</td>
<td>6.63%</td>
<td>$594,000</td>
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<tr>
<td>Denver-Aurora-Lakewood, CO</td>
<td>$1,934</td>
<td>5.64%</td>
<td>$805,399</td>
<td></td>
</tr>
<tr>
<td>DeRidder, LA</td>
<td>$966</td>
<td>3.97%</td>
<td>$636,527</td>
<td></td>
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<tr>
<td>Des Moines, IA</td>
<td>$1,608</td>
<td>5.28%</td>
<td>$677,103</td>
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<tr>
<td>Detroit-Warren-Dearborn, MI</td>
<td>$1,484</td>
<td>5.39%</td>
<td>$706,941</td>
<td></td>
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<tr>
<td>Dickinson, ND</td>
<td>$1,852</td>
<td>5.12%</td>
<td>$515,385</td>
<td></td>
</tr>
<tr>
<td>Dixon, IL</td>
<td>$1,324</td>
<td>5.12%</td>
<td>$606,853</td>
<td></td>
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<tr>
<td>Dodge City, KS</td>
<td>$1,560</td>
<td>7.04%</td>
<td>$527,096</td>
<td></td>
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<tr>
<td>Dothan, AL</td>
<td>$2,189</td>
<td>9.37%</td>
<td>$651,787</td>
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<tr>
<td>Douglas, GA</td>
<td>$1,169</td>
<td>6.31%</td>
<td>$583,586</td>
<td></td>
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<tr>
<td>Dover, DE</td>
<td>$1,914</td>
<td>7.51%</td>
<td>$970,756</td>
<td></td>
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<tr>
<td>Dublin, GA</td>
<td>$2,162</td>
<td>12.32%</td>
<td>$687,409</td>
<td></td>
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<tr>
<td>DuBois, PA</td>
<td>$1,879</td>
<td>8.55%</td>
<td>$595,584</td>
<td></td>
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<tr>
<td>Dubuque, IA</td>
<td>$2,220</td>
<td>8.23%</td>
<td>$719,755</td>
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<tr>
<td>Duluth, MN-WI</td>
<td>$2,157</td>
<td>8.36%</td>
<td>$716,735</td>
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<td>Dumas, TX</td>
<td>$2,190</td>
<td>10.35%</td>
<td>$580,250</td>
<td></td>
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<tr>
<td>Duncan, OK</td>
<td>$867</td>
<td>3.66%</td>
<td>$458,129</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>Sales</td>
<td>Growth Rate</td>
<td>Current Population</td>
<td>OOH Sales</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>-------------</td>
<td>-------------</td>
<td>--------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Dunn, NC</td>
<td>$957</td>
<td>4.63%</td>
<td>188</td>
<td>$653,027</td>
</tr>
<tr>
<td>Durango, CO</td>
<td>$3,209</td>
<td>10.22%</td>
<td>279</td>
<td>$623,036</td>
</tr>
<tr>
<td>Durant, OK</td>
<td>$2,120</td>
<td>9.92%</td>
<td>195</td>
<td>$490,995</td>
</tr>
<tr>
<td>Durham-Chapel Hill, NC</td>
<td>$1,682</td>
<td>5.54%</td>
<td>1,191</td>
<td>$768,870</td>
</tr>
<tr>
<td>Dyersburg, TN</td>
<td>$1,732</td>
<td>7.57%</td>
<td>101</td>
<td>$654,564</td>
</tr>
<tr>
<td>Eagle Pass, TX</td>
<td>$1,476</td>
<td>10.47%</td>
<td>142</td>
<td>$593,725</td>
</tr>
<tr>
<td>East Stroudsburg, PA</td>
<td>$1,472</td>
<td>5.76%</td>
<td>279</td>
<td>$608,575</td>
</tr>
<tr>
<td>Easton, MD</td>
<td>$3,768</td>
<td>10.18%</td>
<td>142</td>
<td>$1,005,183</td>
</tr>
<tr>
<td>Eau Claire, WI</td>
<td>$1,929</td>
<td>7.61%</td>
<td>490</td>
<td>$653,808</td>
</tr>
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<td>Edwards, CO</td>
<td>$3,644</td>
<td>10.04%</td>
<td>250</td>
<td>$764,808</td>
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<td>Effingham, IL</td>
<td>$4,365</td>
<td>15.15%</td>
<td>136</td>
<td>$1,101,346</td>
</tr>
<tr>
<td>El Campo, TX</td>
<td>$1,642</td>
<td>7.49%</td>
<td>137</td>
<td>$497,942</td>
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<td>El Centro, CA</td>
<td>$1,313</td>
<td>8.26%</td>
<td>257</td>
<td>$917,148</td>
</tr>
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<td>El Dorado, AR</td>
<td>$1,238</td>
<td>5.37%</td>
<td>109</td>
<td>$457,073</td>
</tr>
<tr>
<td>El Paso, TX</td>
<td>$1,520</td>
<td>7.87%</td>
<td>1,546</td>
<td>$841,124</td>
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<tr>
<td>Elizabeth City, NC</td>
<td>$1,589</td>
<td>6.51%</td>
<td>134</td>
<td>$754,858</td>
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<td>Elizabethtown-Fort Knox, KY</td>
<td>$1,594</td>
<td>6.67%</td>
<td>302</td>
<td>$804,901</td>
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<td>Elk City, OK</td>
<td>$1,959</td>
<td>6.88%</td>
<td>97</td>
<td>$492,938</td>
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<td>Elkhart-Goshen, IN</td>
<td>$1,553</td>
<td>7.70%</td>
<td>402</td>
<td>$780,896</td>
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<tr>
<td>Elkins, WV</td>
<td>$2,475</td>
<td>11.70%</td>
<td>158</td>
<td>$460,867</td>
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<tr>
<td>Elko, NV</td>
<td>$1,962</td>
<td>6.35%</td>
<td>109</td>
<td>$1,023,404</td>
</tr>
<tr>
<td>Ellensburg, WA</td>
<td>$2,241</td>
<td>9.65%</td>
<td>142</td>
<td>$671,542</td>
</tr>
<tr>
<td>Elmira, NY</td>
<td>$2,736</td>
<td>10.65%</td>
<td>212</td>
<td>$1,135,764</td>
</tr>
<tr>
<td>Emporia, KS</td>
<td>$1,975</td>
<td>9.48%</td>
<td>121</td>
<td>$545,355</td>
</tr>
<tr>
<td>Enid, OK</td>
<td>$1,705</td>
<td>6.61%</td>
<td>203</td>
<td>$532,887</td>
</tr>
<tr>
<td>Enterprise, AL</td>
<td>$1,860</td>
<td>7.50%</td>
<td>159</td>
<td>$596,774</td>
</tr>
<tr>
<td>Erie, PA</td>
<td>$1,609</td>
<td>6.52%</td>
<td>537</td>
<td>$838,024</td>
</tr>
<tr>
<td>Escanaba, MI</td>
<td>$1,787</td>
<td>8.06%</td>
<td>115</td>
<td>$572,904</td>
</tr>
<tr>
<td>Espanola, NM</td>
<td>$1,989</td>
<td>9.34%</td>
<td>134</td>
<td>$591,604</td>
</tr>
<tr>
<td>Eugene, OR</td>
<td>$1,687</td>
<td>7.10%</td>
<td>935</td>
<td>$647,786</td>
</tr>
<tr>
<td>Eureka-Arcata-Fortuna, CA</td>
<td>$1,733</td>
<td>7.08%</td>
<td>366</td>
<td>$639,077</td>
</tr>
<tr>
<td>Evanston, WY</td>
<td>$1,997</td>
<td>7.46%</td>
<td>75</td>
<td>$561,747</td>
</tr>
<tr>
<td>Evansville, IN-KY</td>
<td>$2,011</td>
<td>7.77%</td>
<td>741</td>
<td>$856,431</td>
</tr>
<tr>
<td>Fairbanks, AK</td>
<td>$2,169</td>
<td>6.82%</td>
<td>268</td>
<td>$815,131</td>
</tr>
<tr>
<td>Fairfield, IA</td>
<td>$1,373</td>
<td>5.15%</td>
<td>62</td>
<td>$372,258</td>
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<tr>
<td>Fairmont, WV</td>
<td>$1,092</td>
<td>4.25%</td>
<td>118</td>
<td>$527,415</td>
</tr>
<tr>
<td>Fallon, NV</td>
<td>$2,181</td>
<td>8.81%</td>
<td>58</td>
<td>$924,190</td>
</tr>
<tr>
<td>Fargo, ND-MN</td>
<td>$1,760</td>
<td>5.53%</td>
<td>485</td>
<td>$843,004</td>
</tr>
<tr>
<td>Faribault-Northfield, MN</td>
<td>$1,099</td>
<td>4.12%</td>
<td>98</td>
<td>$734,959</td>
</tr>
<tr>
<td>Farmington, MO</td>
<td>$1,899</td>
<td>10.85%</td>
<td>188</td>
<td>$673,543</td>
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<td>Farmington, NM</td>
<td>$1,418</td>
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<td>206</td>
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<td>$1,481</td>
<td>5.88%</td>
<td>1,187</td>
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<td>Fayetteville, NC</td>
<td>$1,666</td>
<td>7.31%</td>
<td>781</td>
<td>$829,496</td>
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<td>Fergus Falls, MN</td>
<td>$2,584</td>
<td>8.63%</td>
<td>221</td>
<td>$674,421</td>
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<tr>
<td>City</td>
<td>Sales</td>
<td>Hold</td>
<td>Restaurants</td>
<td>Population</td>
</tr>
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<tr>
<td>Fernley, NV</td>
<td>$1,536</td>
<td>7.35%</td>
<td>91</td>
<td>$885,692</td>
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<tr>
<td>Findlay, OH</td>
<td>$2,039</td>
<td>7.23%</td>
<td>174</td>
<td>$892,184</td>
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<td>Fitzgerald, GA</td>
<td>$1,586</td>
<td>9.40%</td>
<td>51</td>
<td>$542,784</td>
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<td>Flagstaff, AZ</td>
<td>$2,672</td>
<td>11.94%</td>
<td>378</td>
<td>$973,884</td>
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<td>Flint, MI</td>
<td>$1,416</td>
<td>6.48%</td>
<td>756</td>
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<td>Florence-Muscle Shoals, AL</td>
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<td>392</td>
<td>$678,796</td>
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<td>Florence, SC</td>
<td>$1,734</td>
<td>7.87%</td>
<td>486</td>
<td>$736,947</td>
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<td>$1,531</td>
<td>5.86%</td>
<td>207</td>
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<td>Forest City, NC</td>
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<td>5.44%</td>
<td>124</td>
<td>$583,790</td>
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<td>Forrest City, AR</td>
<td>$1,946</td>
<td>12.18%</td>
<td>103</td>
<td>$503,087</td>
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<td>Fort Collins, CO</td>
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<td>6.89%</td>
<td>775</td>
<td>$887,760</td>
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<td>Fort Dodge, IA</td>
<td>$3,039</td>
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<td>205</td>
<td>$543,239</td>
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<td>4.49%</td>
<td>125</td>
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<td>78</td>
<td>$530,141</td>
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<td>5.07%</td>
<td>84</td>
<td>$731,393</td>
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<td>$1,384</td>
<td>6.97%</td>
<td>663</td>
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<td>$1,801</td>
<td>7.09%</td>
<td>816</td>
<td>$943,686</td>
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<td>Frankfurt, IN</td>
<td>$962</td>
<td>4.47%</td>
<td>48</td>
<td>$657,271</td>
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<td>Frankfort, KY</td>
<td>$1,502</td>
<td>5.94%</td>
<td>143</td>
<td>$754,594</td>
</tr>
<tr>
<td>Fredericksburg, TX</td>
<td>$2,754</td>
<td>8.79%</td>
<td>130</td>
<td>$549,869</td>
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<tr>
<td>Freeport, IL</td>
<td>$2,094</td>
<td>8.41%</td>
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<td>$769,706</td>
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<td>Fremont, NE</td>
<td>$1,757</td>
<td>6.94%</td>
<td>116</td>
<td>$550,034</td>
</tr>
<tr>
<td>Fremont, OH</td>
<td>$1,582</td>
<td>6.89%</td>
<td>120</td>
<td>$786,550</td>
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<td>Fresno, CA</td>
<td>$1,657</td>
<td>8.86%</td>
<td>1,950</td>
<td>$825,120</td>
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<td>Gadsden, AL</td>
<td>$1,496</td>
<td>7.55%</td>
<td>228</td>
<td>$679,311</td>
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<td>Gaffney, SC</td>
<td>$1,487</td>
<td>8.30%</td>
<td>105</td>
<td>$793,752</td>
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<td>Gainesville, TX</td>
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<td>8.80%</td>
<td>113</td>
<td>$771,407</td>
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<td>Gainesville, FL</td>
<td>$2,375</td>
<td>9.22%</td>
<td>662</td>
<td>$976,757</td>
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<tr>
<td>Gainesville, GA</td>
<td>$1,707</td>
<td>7.86%</td>
<td>472</td>
<td>$692,657</td>
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<td>8.10%</td>
<td>102</td>
<td>$913,676</td>
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<td>Gallup, NM</td>
<td>$1,546</td>
<td>11.14%</td>
<td>141</td>
<td>$809,418</td>
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<td>Garden City, KS</td>
<td>$2,968</td>
<td>12.68%</td>
<td>227</td>
<td>$535,987</td>
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<td>Gardnerville Ranchos, NV</td>
<td>$3,643</td>
<td>10.98%</td>
<td>136</td>
<td>$1,288,971</td>
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<td>Georgetown, SC</td>
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<td>8.98%</td>
<td>205</td>
<td>$641,595</td>
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<td>$633,328</td>
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<td>$2,020</td>
<td>6.23%</td>
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<td>7.70%</td>
<td>147</td>
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<td>Glens Falls, NY</td>
<td>$2,592</td>
<td>9.03%</td>
<td>440</td>
<td>$753,870</td>
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<td>Glenwood Springs, CO</td>
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<td>12.06%</td>
<td>397</td>
<td>$707,030</td>
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<td>Gloversville, NY</td>
<td>$1,735</td>
<td>6.94%</td>
<td>135</td>
<td>$694,659</td>
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<td>Goldsboro, NC</td>
<td>$1,698</td>
<td>8.41%</td>
<td>258</td>
<td>$826,535</td>
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<td>Grand Forks, ND-MN</td>
<td>$2,350</td>
<td>8.07%</td>
<td>381</td>
<td>$632,927</td>
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<tr>
<td>Grand Island, NE</td>
<td>$1,847</td>
<td>7.44%</td>
<td>244</td>
<td>$643,184</td>
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<tr>
<td>City, State</td>
<td>Average Weekly Hourly Earnings</td>
<td>County Wage Growth</td>
<td>Total Weekly Earnings</td>
<td>Estimated Sales</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------------------------</td>
<td>-------------------</td>
<td>----------------------</td>
<td>----------------</td>
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<tr>
<td>Grand Junction, CO</td>
<td>$2,153</td>
<td>8.74%</td>
<td>348</td>
<td>$ 920,842</td>
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<tr>
<td>Grand Rapids-Wyoming, MI</td>
<td>$1,454</td>
<td>5.77%</td>
<td>1,918</td>
<td>$ 782,009</td>
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<td>Grants, NM</td>
<td>$1,067</td>
<td>6.43%</td>
<td>49</td>
<td>$ 595,653</td>
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<td>Grants Pass, OR</td>
<td>$1,444</td>
<td>7.04%</td>
<td>194</td>
<td>$ 621,851</td>
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<td>Great Bend, KS</td>
<td>$1,714</td>
<td>6.72%</td>
<td>105</td>
<td>$ 447,229</td>
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<td>Great Falls, MT</td>
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<td>8.34%</td>
<td>272</td>
<td>$ 639,206</td>
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<td>Greeley, CO</td>
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<td>4.62%</td>
<td>465</td>
<td>$ 730,751</td>
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<td>Green Bay, WI</td>
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<td>4.99%</td>
<td>670</td>
<td>$ 658,849</td>
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<td>$1,178</td>
<td>6.04%</td>
<td>120</td>
<td>$ 665,783</td>
</tr>
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<td>Greenfield Town, MA</td>
<td>$1,385</td>
<td>4.52%</td>
<td>153</td>
<td>$ 642,248</td>
</tr>
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<td>Greensboro-High Point, NC</td>
<td>$1,635</td>
<td>7.10%</td>
<td>1,563</td>
<td>$ 791,987</td>
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<td>Greensburg, IN</td>
<td>$2,881</td>
<td>13.22%</td>
<td>100</td>
<td>$ 764,260</td>
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<td>Greenville, MS</td>
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<td>10.90%</td>
<td>133</td>
<td>$ 701,233</td>
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<tr>
<td>Greenville, NC</td>
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<td>8.46%</td>
<td>388</td>
<td>$ 863,951</td>
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<td>5.79%</td>
<td>117</td>
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<td>7.15%</td>
<td>1,992</td>
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<td>7.01%</td>
<td>197</td>
<td>$ 682,416</td>
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<td>Grenada, MS</td>
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<td>14.20%</td>
<td>76</td>
<td>$ 846,882</td>
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<td>Gulfport-Biloxi-Pascagoula, MS</td>
<td>$1,913</td>
<td>8.61%</td>
<td>803</td>
<td>$ 923,549</td>
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<td>Guymon, OK</td>
<td>$2,415</td>
<td>11.02%</td>
<td>128</td>
<td>$ 429,758</td>
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<td>Hagerstown, MD-WV</td>
<td>$1,552</td>
<td>5.86%</td>
<td>497</td>
<td>$ 815,702</td>
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<td>Hailey, ID</td>
<td>$2,226</td>
<td>7.73%</td>
<td>127</td>
<td>$ 488,228</td>
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<td>Hammond, LA</td>
<td>$1,793</td>
<td>8.93%</td>
<td>254</td>
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<td>6.11%</td>
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<td>Hannibal, MO</td>
<td>$1,527</td>
<td>6.65%</td>
<td>104</td>
<td>$ 574,452</td>
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<td>Harrisburg-Carlisle, PA</td>
<td>$1,703</td>
<td>5.64%</td>
<td>1,335</td>
<td>$ 716,658</td>
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<td>Harrison, AR</td>
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<td>5.34%</td>
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<td>$ 502,271</td>
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<td>Harrisonburg, VA</td>
<td>$2,032</td>
<td>9.18%</td>
<td>319</td>
<td>$ 837,498</td>
</tr>
<tr>
<td>Hartford-West Hartford, CT</td>
<td>$2,204</td>
<td>6.27%</td>
<td>2,915</td>
<td>$ 919,167</td>
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<td>Hastings, NE</td>
<td>$1,502</td>
<td>5.44%</td>
<td>89</td>
<td>$ 537,427</td>
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<td>$ 967,656</td>
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<td>$2,899</td>
<td>11.28%</td>
<td>143</td>
<td>$ 592,007</td>
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<td>Heber, UT</td>
<td>$1,175</td>
<td>4.49%</td>
<td>49</td>
<td>$ 656,265</td>
</tr>
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<td>Helena, MT</td>
<td>$1,612</td>
<td>5.25%</td>
<td>199</td>
<td>$ 629,482</td>
</tr>
<tr>
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<td>$ 925</td>
<td>5.01%</td>
<td>44</td>
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</tr>
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<td>Henderson, NC</td>
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<td>$ 852,286</td>
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<td>71</td>
<td>$ 396,915</td>
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<tr>
<td>Herriman-Pendleton, OR</td>
<td>$1,174</td>
<td>5.50%</td>
<td>173</td>
<td>$ 606,746</td>
</tr>
<tr>
<td>Hickory-Lenoir-Morganton, NC</td>
<td>$1,432</td>
<td>6.82%</td>
<td>668</td>
<td>$ 780,533</td>
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<td>$ 864</td>
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<td>$ 470,714</td>
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<td>487</td>
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<td>8.25%</td>
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<td>$ 775,572</td>
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<td>Hinesville, GA</td>
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<td>6.29%</td>
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<td>$ 700,329</td>
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<tr>
<td>Hobbs, NM</td>
<td>$1,429</td>
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<td>181</td>
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<td>$677,201</td>
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<td>Homosassa Springs, FL</td>
<td>$1,325</td>
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<td>263</td>
<td>$706,190</td>
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<td>Honolulu (Urban), HI</td>
<td>$3,265</td>
<td>10.84%</td>
<td>2,408</td>
<td>$1,351,022</td>
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<tr>
<td>Hood River, OR</td>
<td>$2,581</td>
<td>8.99%</td>
<td>98</td>
<td>$613,837</td>
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<td>Hot Springs, AR</td>
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<td>6.26%</td>
<td>294</td>
<td>$537,486</td>
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<td>Houghton, MI</td>
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<td>13.30%</td>
<td>194</td>
<td>$536,402</td>
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<td>Houma-Thibodaux, LA</td>
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<td>7.06%</td>
<td>405</td>
<td>$894,005</td>
</tr>
<tr>
<td>Houston-The Woodlands, TX</td>
<td>$1,557</td>
<td>5.37%</td>
<td>13,191</td>
<td>$763,333</td>
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<tr>
<td>Huntington, NY</td>
<td>$2,259</td>
<td>7.02%</td>
<td>233</td>
<td>$600,107</td>
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<tr>
<td>Huntingdon, PA</td>
<td>$1,728</td>
<td>7.96%</td>
<td>115</td>
<td>$683,443</td>
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<tr>
<td>Huntington, IN</td>
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<td>5.80%</td>
<td>70</td>
<td>$680,357</td>
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<tr>
<td>Huntington-Ashland, WV-KY-OH</td>
<td>$1,771</td>
<td>7.33%</td>
<td>928</td>
<td>$693,449</td>
</tr>
<tr>
<td>Huntsville, AL</td>
<td>$1,654</td>
<td>5.33%</td>
<td>947</td>
<td>$775,072</td>
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<tr>
<td>Huntsville, TX</td>
<td>$2,274</td>
<td>12.00%</td>
<td>274</td>
<td>$699,843</td>
</tr>
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<td>Huron, SD</td>
<td>$1,896</td>
<td>7.03%</td>
<td>68</td>
<td>$512,618</td>
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<tr>
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<td>$1,569</td>
<td>6.51%</td>
<td>147</td>
<td>$683,667</td>
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<tr>
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<td>$1,917</td>
<td>7.20%</td>
<td>80</td>
<td>$853,213</td>
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<td>6.31%</td>
<td>267</td>
<td>$764,360</td>
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<tr>
<td>Indiana, PA</td>
<td>$1,498</td>
<td>6.37%</td>
<td>186</td>
<td>$701,849</td>
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<tr>
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<td>$1,784</td>
<td>6.45%</td>
<td>3,955</td>
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</tr>
<tr>
<td>Indianola, MS</td>
<td>$935</td>
<td>6.59%</td>
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<td>$582,386</td>
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<tr>
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<td>$776</td>
<td>3.86%</td>
<td>83</td>
<td>$600,506</td>
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<tr>
<td>Iowa City, IA</td>
<td>$1,915</td>
<td>6.34%</td>
<td>421</td>
<td>$751,810</td>
</tr>
<tr>
<td>Iron Mountain, MI-WI</td>
<td>$1,917</td>
<td>7.36%</td>
<td>123</td>
<td>$476,106</td>
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<tr>
<td>Ithaca, NY</td>
<td>$2,234</td>
<td>7.34%</td>
<td>234</td>
<td>$1,000,316</td>
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<td>Jackson, MS</td>
<td>$2,133</td>
<td>8.68%</td>
<td>1,360</td>
<td>$906,819</td>
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<tr>
<td>Jackson, MI</td>
<td>$1,254</td>
<td>5.80%</td>
<td>272</td>
<td>$740,254</td>
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<td>Jackson, OH</td>
<td>$1,389</td>
<td>6.70%</td>
<td>84</td>
<td>$538,452</td>
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<tr>
<td>Jackson, TN</td>
<td>$3,048</td>
<td>12.90%</td>
<td>575</td>
<td>$694,917</td>
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<tr>
<td>Jackson, WY-ID</td>
<td>$3,709</td>
<td>10.67%</td>
<td>132</td>
<td>$937,189</td>
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<tr>
<td>Jacksonville, FL</td>
<td>$2,079</td>
<td>7.89%</td>
<td>3,317</td>
<td>$888,233</td>
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<td>Jacksonville, IL</td>
<td>$2,541</td>
<td>9.75%</td>
<td>130</td>
<td>$779,846</td>
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<tr>
<td>Jacksonville, NC</td>
<td>$1,480</td>
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<td>$1,311</td>
<td>7.04%</td>
<td>84</td>
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</tr>
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<td>Jamestown, NY</td>
<td>$1,896</td>
<td>6.14%</td>
<td>95</td>
<td>$424,484</td>
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<td>Jamestown-Fredonia, NY</td>
<td>$2,312</td>
<td>10.06%</td>
<td>307</td>
<td>$996,430</td>
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<td>Janesville-Beloit, WI</td>
<td>$1,387</td>
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<td>Jasper, IN</td>
<td>$1,838</td>
<td>7.24%</td>
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<td>$1,979</td>
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<td>137</td>
<td>$888,474</td>
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<td>Jefferson City, MO</td>
<td>$1,935</td>
<td>8.08%</td>
<td>407</td>
<td>$716,224</td>
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<td>Jesup, GA</td>
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<td>6.40%</td>
<td>60</td>
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<td>$1,818</td>
<td>7.68%</td>
<td>454</td>
<td>$808,163</td>
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<td>Johnstown, PA</td>
<td>$1,369</td>
<td>5.84%</td>
<td>279</td>
<td>$681,935</td>
</tr>
<tr>
<td>Location</td>
<td>Revenue</td>
<td>Revenue Growth</td>
<td>Sales</td>
<td>Revenue</td>
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<td>Jonesboro, AR</td>
<td>$1,520</td>
<td>6.46%</td>
<td>279</td>
<td>$695,781</td>
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<td>$2,111</td>
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<td>486</td>
<td>$760,681</td>
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<td>Junction City, KS</td>
<td>$1,261</td>
<td>5.89%</td>
<td>84</td>
<td>$568,702</td>
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<td>Juneau, AK</td>
<td>$2,813</td>
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<td>140</td>
<td>$670,571</td>
</tr>
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<td>Kahului-Wailuku-Lahaina, HI</td>
<td>$4,721</td>
<td>17.05%</td>
<td>506</td>
<td>$1,521,451</td>
</tr>
<tr>
<td>Kalamazoo-Portage, MI</td>
<td>$1,655</td>
<td>6.85%</td>
<td>687</td>
<td>$806,891</td>
</tr>
<tr>
<td>Kalispell, MT</td>
<td>$2,027</td>
<td>7.64%</td>
<td>340</td>
<td>$563,679</td>
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<td>Kankakee, IL</td>
<td>$2,093</td>
<td>8.80%</td>
<td>262</td>
<td>$888,477</td>
</tr>
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<td>Kansas City, MO-KS</td>
<td>$1,644</td>
<td>5.66%</td>
<td>4,228</td>
<td>$807,379</td>
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<td>Kapaa, HI</td>
<td>$4,499</td>
<td>17.35%</td>
<td>241</td>
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<td>Kearney, NE</td>
<td>$1,864</td>
<td>6.61%</td>
<td>175</td>
<td>$587,594</td>
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<td>Keene, NH</td>
<td>$1,992</td>
<td>6.91%</td>
<td>250</td>
<td>$613,428</td>
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<td>$1,280</td>
<td>5.79%</td>
<td>91</td>
<td>$670,242</td>
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<tr>
<td>Kalamazoo-Portage, MI</td>
<td>$1,655</td>
<td>6.85%</td>
<td>687</td>
<td>$806,891</td>
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<td>6.46%</td>
<td>142</td>
<td>$619,415</td>
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<td>$2,477</td>
<td>7.75%</td>
<td>53</td>
<td>$648,057</td>
</tr>
<tr>
<td>Key West, FL</td>
<td>$4,429</td>
<td>12.14%</td>
<td>429</td>
<td>$797,522</td>
</tr>
<tr>
<td>Kill Devil Hills, NC</td>
<td>$5,191</td>
<td>17.11%</td>
<td>291</td>
<td>$707,230</td>
</tr>
<tr>
<td>Kill Devil Hills, NC</td>
<td>$1,412</td>
<td>6.13%</td>
<td>786</td>
<td>$778,528</td>
</tr>
<tr>
<td>Kingsport-Bristol-Bristol, TN-VA</td>
<td>$1,856</td>
<td>7.76%</td>
<td>707</td>
<td>$810,576</td>
</tr>
<tr>
<td>Kingston, NY</td>
<td>$2,476</td>
<td>8.00%</td>
<td>744</td>
<td>$598,828</td>
</tr>
<tr>
<td>Kingsville, TX</td>
<td>$1,739</td>
<td>8.52%</td>
<td>85</td>
<td>$672,918</td>
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<tr>
<td>Kinston, NC</td>
<td>$1,539</td>
<td>7.47%</td>
<td>129</td>
<td>$704,791</td>
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<td>Kirksville, MO</td>
<td>$2,321</td>
<td>11.40%</td>
<td>120</td>
<td>$578,075</td>
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<td>Klamath Falls, OR</td>
<td>$1,540</td>
<td>7.50%</td>
<td>189</td>
<td>$541,937</td>
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<tr>
<td>Knoxville, TN</td>
<td>$1,755</td>
<td>7.05%</td>
<td>1,825</td>
<td>$826,449</td>
</tr>
<tr>
<td>Kokomo, IN</td>
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<td>9.53%</td>
<td>187</td>
<td>$923,936</td>
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<tr>
<td>La Crosse-Onalaska, WI-MN</td>
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<td>8.23%</td>
<td>427</td>
<td>$713,532</td>
</tr>
<tr>
<td>La Grande, OR</td>
<td>$2,775</td>
<td>12.81%</td>
<td>135</td>
<td>$536,363</td>
</tr>
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<td>Laconia, NH</td>
<td>$2,665</td>
<td>8.38%</td>
<td>230</td>
<td>$697,904</td>
</tr>
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<td>Lafayette, LA</td>
<td>$1,865</td>
<td>7.15%</td>
<td>1,023</td>
<td>$885,254</td>
</tr>
<tr>
<td>Lafayette-West Lafayette, IN</td>
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<td>8.76%</td>
<td>470</td>
<td>$916,987</td>
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<tr>
<td>LaGrange, GA</td>
<td>$1,536</td>
<td>7.00%</td>
<td>151</td>
<td>$711,536</td>
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<td>$1,808</td>
<td>7.48%</td>
<td>376</td>
<td>$977,463</td>
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<td>Lake City, FL</td>
<td>$2,442</td>
<td>12.99%</td>
<td>173</td>
<td>$957,908</td>
</tr>
<tr>
<td>Lake Havasu City-Kingman, AZ</td>
<td>$1,488</td>
<td>7.61%</td>
<td>408</td>
<td>$742,056</td>
</tr>
<tr>
<td>Lakeland-Winter Haven, FL</td>
<td>$1,495</td>
<td>7.33%</td>
<td>977</td>
<td>$968,038</td>
</tr>
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<td>Lamesa, TX</td>
<td>$1,206</td>
<td>6.65%</td>
<td>31</td>
<td>$542,290</td>
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<tr>
<td>Lancaster, PA</td>
<td>$1,373</td>
<td>5.25%</td>
<td>977</td>
<td>$750,890</td>
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<td>Laredo, TX</td>
<td>$1,505</td>
<td>11.20%</td>
<td>556</td>
<td>$731,266</td>
</tr>
<tr>
<td>Las Cruces, NM</td>
<td>$1,312</td>
<td>6.55%</td>
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<td>$750,513</td>
</tr>
<tr>
<td>City/Metro Area</td>
<td>Average Price</td>
<td>Average Price Increase</td>
<td>Total Visits</td>
<td>Total Revenue</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>---------------</td>
<td>------------------------</td>
<td>--------------</td>
<td>--------------</td>
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<tr>
<td>Las Vegas, NM</td>
<td>$2,580</td>
<td>13.71%</td>
<td>106</td>
<td>$682,189</td>
</tr>
<tr>
<td>Las Vegas-Henderson, NV</td>
<td>$3,598</td>
<td>15.26%</td>
<td>4,993</td>
<td>$1,488,614</td>
</tr>
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<td>$2,057</td>
<td>10.11%</td>
<td>223</td>
<td>$791,489</td>
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<td>$1,209</td>
<td>7.60%</td>
<td>52</td>
<td>$841,635</td>
</tr>
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<td>Lawrence, KS</td>
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<td>6.07%</td>
<td>267</td>
<td>$708,955</td>
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<td>8.05%</td>
<td>122</td>
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<td>Lawton, OK</td>
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<td>6.01%</td>
<td>249</td>
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<td>$2,792</td>
<td>13.10%</td>
<td>148</td>
<td>$675,730</td>
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<td>$1,118</td>
<td>4.31%</td>
<td>240</td>
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<td>Levelland, TX</td>
<td>$1,458</td>
<td>5.71%</td>
<td>69</td>
<td>$500,000</td>
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<td>Lewisburg, PA</td>
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<td>Lewisburg, TN</td>
<td>$988</td>
<td>4.52%</td>
<td>55</td>
<td>$562,945</td>
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<tr>
<td>Lewiston, ID-WA</td>
<td>$1,619</td>
<td>6.44%</td>
<td>174</td>
<td>$582,408</td>
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<td>6.64%</td>
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<td>$599,717</td>
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<td>Lewiston-Auburn, ME</td>
<td>$1,832</td>
<td>7.33%</td>
<td>252</td>
<td>$782,075</td>
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<td>Lexington, NE</td>
<td>$3,247</td>
<td>14.38%</td>
<td>164</td>
<td>$516,939</td>
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<td>Lexington-Fayette, KY</td>
<td>$1,919</td>
<td>6.76%</td>
<td>1,109</td>
<td>$860,247</td>
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<tr>
<td>Liberal, KS</td>
<td>$3,059</td>
<td>15.20%</td>
<td>70</td>
<td>$1,026,643</td>
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<td>Lima, OH</td>
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<td>8.77%</td>
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<td>Lincoln, NE</td>
<td>$1,579</td>
<td>5.54%</td>
<td>710</td>
<td>$711,190</td>
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<td>Lincoln, IL</td>
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<td>6.24%</td>
<td>55</td>
<td>$759,473</td>
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<tr>
<td>Little Rock, AR</td>
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<td>5.83%</td>
<td>1,693</td>
<td>$664,978</td>
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<tr>
<td>Lock Haven, PA</td>
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<td>5.03%</td>
<td>75</td>
<td>$605,987</td>
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<tr>
<td>Logan, UT-ID</td>
<td>$1,236</td>
<td>6.44%</td>
<td>201</td>
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<td>$448,541</td>
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<td>6.56%</td>
<td>78</td>
<td>$639,987</td>
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<tr>
<td>London, KY</td>
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<td>245</td>
<td>$710,290</td>
</tr>
<tr>
<td>Longview, TX</td>
<td>$1,769</td>
<td>7.65%</td>
<td>527</td>
<td>$739,281</td>
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<td>6.88%</td>
<td>227</td>
<td>$707,692</td>
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<td>Los Alamos, NM</td>
<td>$996</td>
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<td>35</td>
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<td>Los Angeles-Long Beach, CA</td>
<td>$1,897</td>
<td>6.89%</td>
<td>33,016</td>
<td>$764,198</td>
</tr>
<tr>
<td>Louisville, KY-IN</td>
<td>$1,670</td>
<td>6.09%</td>
<td>2,519</td>
<td>$845,699</td>
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<tr>
<td>Lubbock, TX</td>
<td>$2,153</td>
<td>9.25%</td>
<td>694</td>
<td>$954,895</td>
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<td>$3,591</td>
<td>15.14%</td>
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<td>Lufkin, TX</td>
<td>$1,484</td>
<td>7.15%</td>
<td>170</td>
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<td>$1,678</td>
<td>10.85%</td>
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<td>$680,336</td>
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<td>7.08%</td>
<td>539</td>
<td>$825,898</td>
</tr>
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<td>Macomb, IL</td>
<td>$1,823</td>
<td>8.56%</td>
<td>77</td>
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<td>$1,754</td>
<td>8.08%</td>
<td>527</td>
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<td>Madera, CA</td>
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<td>7.10%</td>
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<td>$1,798</td>
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<td>30</td>
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</tr>
<tr>
<td>Madison, WI</td>
<td>$1,612</td>
<td>4.88%</td>
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<td>$711,679</td>
</tr>
<tr>
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<td>$1,984</td>
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<td>$703,962</td>
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<td>$1,199</td>
<td>5.97%</td>
<td>53</td>
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<tr>
<td>Location</td>
<td>Total Revenue</td>
<td>Sales Change</td>
<td>Sales Rank</td>
<td>Sales Rank Change</td>
</tr>
<tr>
<td>----------------------------------</td>
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<tr>
<td>Malone, NY</td>
<td>$2,697</td>
<td>11.66%</td>
<td>167</td>
<td>$833,928</td>
</tr>
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<td>Malvern, AR</td>
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<td>3.28%</td>
<td>39</td>
<td>$558,846</td>
</tr>
<tr>
<td>Manchester-Nashua, NH</td>
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<td>4.31%</td>
<td>861</td>
<td>$713,763</td>
</tr>
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<td>$1,722</td>
<td>7.70%</td>
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<tr>
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<td>$1,110</td>
<td>4.31%</td>
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<td>Mankato-North Mankato, MN</td>
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<td>8.24%</td>
<td>235</td>
<td>$942,838</td>
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<td>Mansfield, OH</td>
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<td>8.18%</td>
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<td>$844,049</td>
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<tr>
<td>Marietta, OH</td>
<td>$1,450</td>
<td>5.69%</td>
<td>156</td>
<td>$567,853</td>
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<td>Marquette, WI-MI</td>
<td>$2,076</td>
<td>8.94%</td>
<td>231</td>
<td>$587,225</td>
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<td>Marion, IN</td>
<td>$1,719</td>
<td>8.16%</td>
<td>136</td>
<td>$868,772</td>
</tr>
<tr>
<td>Marion, NC</td>
<td>$1,695</td>
<td>8.91%</td>
<td>111</td>
<td>$690,676</td>
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<tr>
<td>Marion, OH</td>
<td>$1,380</td>
<td>6.93%</td>
<td>134</td>
<td>$674,425</td>
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<tr>
<td>Marquette, MI</td>
<td>$1,415</td>
<td>5.90%</td>
<td>122</td>
<td>$786,623</td>
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<tr>
<td>Marshall, MN</td>
<td>$3,077</td>
<td>11.33%</td>
<td>111</td>
<td>$704,559</td>
</tr>
<tr>
<td>Marshall, MO</td>
<td>$1,859</td>
<td>9.73%</td>
<td>84</td>
<td>$511,774</td>
</tr>
<tr>
<td>Marshall, TX</td>
<td>$1,413</td>
<td>6.10%</td>
<td>157</td>
<td>$612,904</td>
</tr>
<tr>
<td>Marshalltown, IA</td>
<td>$1,392</td>
<td>5.42%</td>
<td>88</td>
<td>$648,489</td>
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<tr>
<td>Martin, TN</td>
<td>$1,645</td>
<td>7.74%</td>
<td>105</td>
<td>$533,933</td>
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<td>Martinsville, VA</td>
<td>$1,240</td>
<td>6.15%</td>
<td>109</td>
<td>$755,761</td>
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<td>Maryville, MO</td>
<td>$3,266</td>
<td>19.06%</td>
<td>124</td>
<td>$608,960</td>
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<td>$2,808</td>
<td>9.60%</td>
<td>237</td>
<td>$602,110</td>
</tr>
<tr>
<td>Mayfield, KY</td>
<td>$1,197</td>
<td>5.23%</td>
<td>91</td>
<td>$492,308</td>
</tr>
<tr>
<td>Maysville, KY</td>
<td>$2,851</td>
<td>12.31%</td>
<td>69</td>
<td>$705,652</td>
</tr>
<tr>
<td>McAllen-Edinburg-Mission, TX</td>
<td>$1,169</td>
<td>8.22%</td>
<td>1,393</td>
<td>$705,979</td>
</tr>
<tr>
<td>McComb, MS</td>
<td>$1,823</td>
<td>9.67%</td>
<td>129</td>
<td>$742,721</td>
</tr>
<tr>
<td>McMinnville, TN</td>
<td>$1,317</td>
<td>6.89%</td>
<td>104</td>
<td>$507,038</td>
</tr>
<tr>
<td>McPherson, KS</td>
<td>$1,317</td>
<td>4.40%</td>
<td>76</td>
<td>$516,816</td>
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<td>Meadville, PA</td>
<td>$1,143</td>
<td>5.17%</td>
<td>158</td>
<td>$628,133</td>
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<td>Medford, OR</td>
<td>$1,857</td>
<td>7.56%</td>
<td>635</td>
<td>$614,061</td>
</tr>
<tr>
<td>Memphis, TN-MS-AR</td>
<td>$1,686</td>
<td>6.87%</td>
<td>2,731</td>
<td>$831,491</td>
</tr>
<tr>
<td>Menomonie, WI</td>
<td>$1,458</td>
<td>6.38%</td>
<td>105</td>
<td>$615,371</td>
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<td>Merced, CA</td>
<td>$1,120</td>
<td>6.16%</td>
<td>364</td>
<td>$820,687</td>
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<td>Meridian, MS</td>
<td>$2,545</td>
<td>12.28%</td>
<td>324</td>
<td>$837,299</td>
</tr>
<tr>
<td>Merrill, WI</td>
<td>$5,162</td>
<td>20.91%</td>
<td>340</td>
<td>$437,335</td>
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<td>Mexico, MO</td>
<td>$877</td>
<td>4.54%</td>
<td>47</td>
<td>$480,298</td>
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<td>Miami, OK</td>
<td>$2,331</td>
<td>12.28%</td>
<td>159</td>
<td>$474,830</td>
</tr>
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<td>Miami-Fort Lauderdale, FL</td>
<td>$1,815</td>
<td>6.97%</td>
<td>13,590</td>
<td>$791,357</td>
</tr>
<tr>
<td>Michigan City-La Porte, IN</td>
<td>$1,802</td>
<td>7.92%</td>
<td>250</td>
<td>$802,236</td>
</tr>
<tr>
<td>Middlesborough, KY</td>
<td>$2,924</td>
<td>18.76%</td>
<td>115</td>
<td>$697,357</td>
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<td>Midland, MI</td>
<td>$1,595</td>
<td>5.15%</td>
<td>186</td>
<td>$719,586</td>
</tr>
<tr>
<td>Midland, TX</td>
<td>$1,569</td>
<td>4.69%</td>
<td>339</td>
<td>$755,204</td>
</tr>
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<td>Milledgeville, GA</td>
<td>$1,852</td>
<td>11.60%</td>
<td>137</td>
<td>$740,474</td>
</tr>
<tr>
<td>Milwaukee-Waukesha, WI</td>
<td>$1,394</td>
<td>4.82%</td>
<td>2,878</td>
<td>$763,307</td>
</tr>
<tr>
<td>City</td>
<td>Gross Sales</td>
<td>Increase/Decrease</td>
<td>Sales Volume</td>
<td>Average Check</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------</td>
<td>-------------------</td>
<td>--------------</td>
<td>---------------</td>
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<tr>
<td>Mineral Wells, TX:</td>
<td>$2,844</td>
<td>12.17%</td>
<td>153</td>
<td>$ 526,242</td>
</tr>
<tr>
<td>Minneapolis, MN-WI:</td>
<td>$1,716</td>
<td>5.02%</td>
<td>6,550</td>
<td>$ 919,516</td>
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<tr>
<td>Minot, ND:</td>
<td>$1,858</td>
<td>5.92%</td>
<td>242</td>
<td>$ 615,566</td>
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<tr>
<td>Missoula, MT:</td>
<td>$2,719</td>
<td>10.04%</td>
<td>467</td>
<td>$ 657,623</td>
</tr>
<tr>
<td>Mitchell, SD:</td>
<td>$2,841</td>
<td>10.12%</td>
<td>106</td>
<td>$ 626,274</td>
</tr>
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<td>Moberly, MO:</td>
<td>$1,909</td>
<td>9.90%</td>
<td>94</td>
<td>$ 499,840</td>
</tr>
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<td>Mobile, AL:</td>
<td>$1,522</td>
<td>6.93%</td>
<td>851</td>
<td>$ 741,623</td>
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<td>Modesto, CA:</td>
<td>$1,605</td>
<td>8.20%</td>
<td>989</td>
<td>$ 865,787</td>
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<td>Monroe, LA:</td>
<td>$2,156</td>
<td>9.92%</td>
<td>390</td>
<td>$ 992,544</td>
</tr>
<tr>
<td>Monroe, MI:</td>
<td>$1,216</td>
<td>4.72%</td>
<td>242</td>
<td>$ 751,479</td>
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<td>Montgomery, AL:</td>
<td>$1,571</td>
<td>6.58%</td>
<td>815</td>
<td>$ 715,032</td>
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<td>Montrose, CO:</td>
<td>$3,119</td>
<td>13.77%</td>
<td>229</td>
<td>$ 552,271</td>
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<tr>
<td>Morehead City, NC:</td>
<td>$2,446</td>
<td>8.27%</td>
<td>235</td>
<td>$ 724,251</td>
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<td>Morgan City, LA:</td>
<td>$1,493</td>
<td>6.98%</td>
<td>108</td>
<td>$ 735,481</td>
</tr>
<tr>
<td>Morgantown, WV:</td>
<td>$2,168</td>
<td>8.00%</td>
<td>419</td>
<td>$ 718,647</td>
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<td>Morristown, TN:</td>
<td>$1,390</td>
<td>6.91%</td>
<td>213</td>
<td>$ 754,728</td>
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<td>Moscow, ID:</td>
<td>$1,357</td>
<td>5.73%</td>
<td>77</td>
<td>$ 674,338</td>
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<td>Moses Lake, WA:</td>
<td>$1,146</td>
<td>6.12%</td>
<td>170</td>
<td>$ 632,247</td>
</tr>
<tr>
<td>Moultrie, GA:</td>
<td>$1,324</td>
<td>7.69%</td>
<td>108</td>
<td>$ 571,519</td>
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<td>Mount Airy, NC:</td>
<td>$2,352</td>
<td>11.15%</td>
<td>236</td>
<td>$ 729,483</td>
</tr>
<tr>
<td>Mount Pleasant, MI:</td>
<td>$2,259</td>
<td>11.46%</td>
<td>168</td>
<td>$ 945,274</td>
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<tr>
<td>Mount Pleasant, TX:</td>
<td>$2,008</td>
<td>10.58%</td>
<td>93</td>
<td>$ 714,935</td>
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<tr>
<td>Mount Sterling, KY:</td>
<td>$2,791</td>
<td>14.53%</td>
<td>200</td>
<td>$ 642,875</td>
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<td>Mount Vernon, IL:</td>
<td>$3,684</td>
<td>15.01%</td>
<td>153</td>
<td>$ 928,523</td>
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<tr>
<td>Mount Vernon, OH:</td>
<td>$1,060</td>
<td>4.19%</td>
<td>102</td>
<td>$ 630,206</td>
</tr>
<tr>
<td>Mount Vernon-Anacortes, WA:</td>
<td>$1,873</td>
<td>7.04%</td>
<td>357</td>
<td>$ 632,969</td>
</tr>
<tr>
<td>Mountain Home, AR:</td>
<td>$2,124</td>
<td>9.59%</td>
<td>184</td>
<td>$ 470,114</td>
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<tr>
<td>Mountain Home, ID:</td>
<td>$1,000</td>
<td>5.12%</td>
<td>49</td>
<td>$ 529,490</td>
</tr>
<tr>
<td>Muncie, IN:</td>
<td>$1,948</td>
<td>10.08%</td>
<td>230</td>
<td>$ 993,974</td>
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<tr>
<td>Murray, KY:</td>
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<td>7.90%</td>
<td>90</td>
<td>$ 788,489</td>
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<td>Muscatine, IA:</td>
<td>$1,245</td>
<td>5.33%</td>
<td>110</td>
<td>$ 484,791</td>
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<td>Muskegon, MI:</td>
<td>$1,667</td>
<td>7.83%</td>
<td>376</td>
<td>$ 760,189</td>
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<tr>
<td>Muskogee, OK:</td>
<td>$1,635</td>
<td>8.42%</td>
<td>190</td>
<td>$ 602,305</td>
</tr>
<tr>
<td>Myrtle Beach-Conway, SC-NC:</td>
<td>$3,107</td>
<td>13.14%</td>
<td>1,772</td>
<td>$ 734,046</td>
</tr>
<tr>
<td>Nacogdoches, TX:</td>
<td>$1,926</td>
<td>10.03%</td>
<td>177</td>
<td>$ 719,441</td>
</tr>
<tr>
<td>Napa, CA:</td>
<td>$2,343</td>
<td>7.10%</td>
<td>336</td>
<td>$ 987,393</td>
</tr>
<tr>
<td>Naples-Immokalee, FL:</td>
<td>$2,178</td>
<td>6.37%</td>
<td>868</td>
<td>$ 873,657</td>
</tr>
<tr>
<td>Nashville-Davidson, TN:</td>
<td>$1,811</td>
<td>6.44%</td>
<td>4,214</td>
<td>$ 774,140</td>
</tr>
<tr>
<td>Natchez, MS-LA:</td>
<td>$1,958</td>
<td>10.99%</td>
<td>136</td>
<td>$ 751,949</td>
</tr>
<tr>
<td>Natchitoches, LA:</td>
<td>$2,379</td>
<td>10.46%</td>
<td>119</td>
<td>$ 776,034</td>
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<tr>
<td>New Bern, NC:</td>
<td>$1,505</td>
<td>6.06%</td>
<td>249</td>
<td>$ 779,859</td>
</tr>
<tr>
<td>New Castle, IN:</td>
<td>$1,018</td>
<td>5.44%</td>
<td>71</td>
<td>$ 699,873</td>
</tr>
<tr>
<td>New Castle, PA:</td>
<td>$1,280</td>
<td>5.21%</td>
<td>178</td>
<td>$ 636,697</td>
</tr>
<tr>
<td>New Haven-Milford, CT:</td>
<td>$2,092</td>
<td>6.45%</td>
<td>2,385</td>
<td>$ 755,354</td>
</tr>
<tr>
<td>Location</td>
<td>Revenue</td>
<td>Average Tip</td>
<td>Transactions</td>
<td>Sales Volume</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>---------</td>
<td>-------------</td>
<td>--------------</td>
<td>--------------</td>
</tr>
<tr>
<td>New Orleans-Metairie, LA</td>
<td>$2,123</td>
<td>8.15%</td>
<td>3,266</td>
<td>$820,249</td>
</tr>
<tr>
<td>New Philadelphia-Dover, OH</td>
<td>$1,629</td>
<td>6.79%</td>
<td>227</td>
<td>$666,463</td>
</tr>
<tr>
<td>New Ulm, MN</td>
<td>$2,903</td>
<td>10.12%</td>
<td>102</td>
<td>$716,725</td>
</tr>
<tr>
<td>New York-Newark, NY-NJ-PA</td>
<td>$2,011</td>
<td>5.75%</td>
<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>
<tr>
<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>
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<td>Odessa, TX</td>
<td>$1,822</td>
<td>7.40%</td>
<td>355</td>
<td>$787,169</td>
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<tr>
<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>
<tr>
<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>
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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>
</tr>
<tr>
<td>Oxford, MS</td>
<td>$3,472</td>
<td>13.14%</td>
<td>184</td>
<td>$1,000,641</td>
</tr>
<tr>
<td>Location</td>
<td>Sales</td>
<td>Percentage</td>
<td>Sales Growth</td>
<td>Sales 2019</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>---------------</td>
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<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>
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<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>
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<td>Pahrump, NV</td>
<td>$1,985</td>
<td>9.15%</td>
<td>88</td>
<td>$975,625</td>
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<td>Palatka, FL</td>
<td>$1,348</td>
<td>7.38%</td>
<td>117</td>
<td>$831,727</td>
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<tr>
<td>Palestine, TX</td>
<td>$1,391</td>
<td>7.51%</td>
<td>128</td>
<td>$469,125</td>
</tr>
<tr>
<td>Palm Bay-Melbourne, FL</td>
<td>$1,514</td>
<td>7.02%</td>
<td>67</td>
<td>$526,493</td>
</tr>
<tr>
<td>Pampa, TX</td>
<td>$1,154</td>
<td>8.33%</td>
<td>128</td>
<td>$469,125</td>
</tr>
<tr>
<td>Panama City, FL</td>
<td>$3,495</td>
<td>14.36%</td>
<td>759</td>
<td>$889,962</td>
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<td>Paragould, AR</td>
<td>$1,532</td>
<td>7.49%</td>
<td>121</td>
<td>$548,083</td>
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<tr>
<td>Paris, TN</td>
<td>$1,871</td>
<td>8.33%</td>
<td>128</td>
<td>$469,125</td>
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<td>Paris, TX</td>
<td>$1,853</td>
<td>7.86%</td>
<td>157</td>
<td>$591,433</td>
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<td>Parkersburg-Vienna, WV</td>
<td>$2,006</td>
<td>8.51%</td>
<td>266</td>
<td>$696,361</td>
</tr>
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<td>Parsons, KS</td>
<td>$1,486</td>
<td>7.09%</td>
<td>57</td>
<td>$535,386</td>
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<td>Payson, AZ</td>
<td>$1,579</td>
<td>7.69%</td>
<td>116</td>
<td>$719,155</td>
</tr>
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<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>$581,615</td>
</tr>
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<td>Pine Bluff, AR</td>
<td>$1,291</td>
<td>6.51%</td>
<td>234</td>
<td>$515,983</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>
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<td>Pittsfield, MA</td>
<td>$2,179</td>
<td>7.84%</td>
<td>436</td>
<td>$643,663</td>
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<td>Plainview, TX</td>
<td>$1,567</td>
<td>8.59%</td>
<td>88</td>
<td>$644,386</td>
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<tr>
<td>Plateville, 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>
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<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>
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<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>
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<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>
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<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>Average Revenue</td>
<td>Average Unit Sales</td>
<td>Average Weekly Sales</td>
<td>Total Sales</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>
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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>
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<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>
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<td>Red Wing, MN</td>
<td>$1,571</td>
<td>5.24%</td>
<td>89</td>
<td>$823,955</td>
</tr>
<tr>
<td>Redding, CA</td>
<td>$1,978</td>
<td>7.88%</td>
<td>505</td>
<td>$704,632</td>
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<td>Reno, NV</td>
<td>$2,858</td>
<td>11.16%</td>
<td>990</td>
<td>$1,276,834</td>
</tr>
<tr>
<td>Rexburg, ID</td>
<td>$992</td>
<td>5.98%</td>
<td>81</td>
<td>$612,296</td>
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<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>
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<td>Roanoke, VA</td>
<td>$2,194</td>
<td>7.93%</td>
<td>808</td>
<td>$852,076</td>
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<td>$1,359</td>
<td>4.74%</td>
<td>113</td>
<td>$622,743</td>
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<td>Rochester, MN</td>
<td>$1,767</td>
<td>5.40%</td>
<td>461</td>
<td>$821,425</td>
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<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>
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<td>Rockford, IL</td>
<td>$1,829</td>
<td>7.16%</td>
<td>657</td>
<td>$953,376</td>
</tr>
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<td>Rockingham, NC</td>
<td>$1,460</td>
<td>8.03%</td>
<td>94</td>
<td>$717,660</td>
</tr>
<tr>
<td>Rocky Mount, NC</td>
<td>$1,341</td>
<td>6.65%</td>
<td>255</td>
<td>$791,137</td>
</tr>
<tr>
<td>Rolla, MO</td>
<td>$2,707</td>
<td>12.61%</td>
<td>173</td>
<td>$696,775</td>
</tr>
<tr>
<td>Rome, GA</td>
<td>$1,722</td>
<td>8.74%</td>
<td>206</td>
<td>$798,864</td>
</tr>
<tr>
<td>Roseburg, OR</td>
<td>$1,351</td>
<td>6.35%</td>
<td>269</td>
<td>$543,829</td>
</tr>
<tr>
<td>Roswell, NM</td>
<td>$1,296</td>
<td>5.92%</td>
<td>117</td>
<td>$730,009</td>
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<tr>
<td>Russellville, AR</td>
<td>$1,660</td>
<td>8.09%</td>
<td>245</td>
<td>$571,755</td>
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<td>$2,279</td>
<td>10.63%</td>
<td>122</td>
<td>$892,533</td>
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<td>Rutland, VT</td>
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<td>7.31%</td>
<td>228</td>
<td>$533,031</td>
</tr>
<tr>
<td>Location</td>
<td>Sales Volume</td>
<td>Year-over-Year Change</td>
<td>Units</td>
<td>Sales ($USD)</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>--------------</td>
<td>-----------------------</td>
<td>-------</td>
<td>--------------</td>
</tr>
<tr>
<td>Sacramento--Roseville, CA</td>
<td>$1,780</td>
<td>6.38%</td>
<td>4,646</td>
<td>$859,200</td>
</tr>
<tr>
<td>Safford, AZ</td>
<td>$1,153</td>
<td>6.24%</td>
<td>59</td>
<td>$740,203</td>
</tr>
<tr>
<td>Saginaw, MI</td>
<td>$1,534</td>
<td>7.18%</td>
<td>366</td>
<td>$815,530</td>
</tr>
<tr>
<td>Salem, OH</td>
<td>$ 952</td>
<td>3.79%</td>
<td>168</td>
<td>$595,042</td>
</tr>
<tr>
<td>Salem, OR</td>
<td>$1,186</td>
<td>5.67%</td>
<td>789</td>
<td>$609,380</td>
</tr>
<tr>
<td>Salina, KS</td>
<td>$2,287</td>
<td>9.13%</td>
<td>219</td>
<td>$644,808</td>
</tr>
<tr>
<td>Salinas, CA</td>
<td>$1,874</td>
<td>7.87%</td>
<td>978</td>
<td>$829,101</td>
</tr>
<tr>
<td>Salisbury, MD-DE</td>
<td>$3,570</td>
<td>13.00%</td>
<td>1,365</td>
<td>$1,022,064</td>
</tr>
<tr>
<td>Salt Lake City, UT</td>
<td>$1,410</td>
<td>5.50%</td>
<td>2,200</td>
<td>$743,485</td>
</tr>
<tr>
<td>San Angelo, TX</td>
<td>$1,956</td>
<td>8.11%</td>
<td>314</td>
<td>$731,398</td>
</tr>
<tr>
<td>San Antonio-New Braunfels, TX</td>
<td>$1,798</td>
<td>6.94%</td>
<td>4,882</td>
<td>$860,469</td>
</tr>
<tr>
<td>San Diego-Carlsbad, CA</td>
<td>$1,936</td>
<td>6.64%</td>
<td>7,349</td>
<td>$856,156</td>
</tr>
<tr>
<td>San Francisco-Oakland, CA</td>
<td>$1,873</td>
<td>4.46%</td>
<td>12,407</td>
<td>$691,829</td>
</tr>
<tr>
<td>San Jose-Sunnyvale, CA</td>
<td>$1,744</td>
<td>4.05%</td>
<td>4,321</td>
<td>$789,052</td>
</tr>
<tr>
<td>San Luis Obispo, CA</td>
<td>$2,472</td>
<td>7.86%</td>
<td>872</td>
<td>$785,181</td>
</tr>
<tr>
<td>Sandpoint, ID</td>
<td>$1,740</td>
<td>7.25%</td>
<td>158</td>
<td>$448,797</td>
</tr>
<tr>
<td>Sandusky, OH</td>
<td>$2,253</td>
<td>8.67%</td>
<td>224</td>
<td>$759,830</td>
</tr>
<tr>
<td>Sanford, NC</td>
<td>$1,269</td>
<td>6.13%</td>
<td>104</td>
<td>$742,231</td>
</tr>
<tr>
<td>Santa Cruz-Watsonville, CA</td>
<td>$1,822</td>
<td>5.13%</td>
<td>628</td>
<td>$797,538</td>
</tr>
<tr>
<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>
</tr>
<tr>
<td>Savannah, GA</td>
<td>$2,143</td>
<td>8.61%</td>
<td>982</td>
<td>$814,363</td>
</tr>
<tr>
<td>Sayre, PA</td>
<td>$1,340</td>
<td>4.96%</td>
<td>149</td>
<td>$556,215</td>
</tr>
<tr>
<td>Scottsbluff, NE</td>
<td>$2,532</td>
<td>10.28%</td>
<td>207</td>
<td>$475,314</td>
</tr>
<tr>
<td>Scottsboro, AL</td>
<td>$1,800</td>
<td>8.00%</td>
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*RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2020-2021*

- 156 -
<table>
<thead>
<tr>
<th>City</th>
<th>Population</th>
<th>Sales Percentage</th>
<th>Sales</th>
</tr>
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<tbody>
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<td>Shelton, WA</td>
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<td>Sierra Vista-Douglas, AZ</td>
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<td>Sikeston, MO</td>
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<td>8.89%</td>
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<td>Springfield, MO</td>
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<td>Springfield, OH</td>
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<td>St. Marys, GA</td>
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<td>Starkville, MS</td>
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<td>Stephenville, TX</td>
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<td>Sterling, CO</td>
<td>$3,537</td>
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<td>Sterling, IL</td>
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**RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2020-2021**

- 157 -
<table>
<thead>
<tr>
<th>Location</th>
<th>Average Check ($)</th>
<th>Average Tip (%)</th>
<th>Average Number of Diners</th>
<th>Average Bill ($)</th>
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<td>61</td>
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<td>Summit Park, UT</td>
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<td>Sunbury, PA</td>
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<td>Sales per Store</td>
<td>Total Sales</td>
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<td>-----------------------------</td>
<td>--------------------------</td>
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<td>Vincennes, IN</td>
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<td>$462,250</td>
</tr>
<tr>
<td>Walla Walla, WA</td>
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<td>5.28%</td>
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<td>$586,572</td>
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<td>Washington, DC-VA-MD-WV</td>
<td>$2,034</td>
<td>4.46%</td>
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<td>$1,605</td>
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</table>

29.3 Market Resources

Restaurant Business, 1 Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181. (630) 574-5075. (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
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• 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
• Manitowoc, 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. Alcoholic beverages are available at most. Casual-dining restaurants are sometimes referred to as dinnerhouses.

“The segment includes a varied group of restaurants, from bar-and-grills to mid-tier and higher-end steakhouses. Theme restaurants are part of the segment, too, focusing on activities like wine tasting and video gaming.”

Nation’s Restaurant News, 6/18/18


Eighty-one (80) casual-dining chains rank among the 250 largest U.S. restaurant chains, according to Restaurant Business (June 2019). Their combined sales are $53 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
According to The NPD Group (www.npd.com), casual-dining traffic ranged from flat to declines up to 2% each year since 2011. Weekday traffic has been flat since 2014, while weekend traffic has declined each year since 2013. The segment experienced some gains during the recovery from the Great Recession, but otherwise the decline extends back about 15 years.
Knapp Track (www.malcolmknapp.com) assessed that since 2008, casual dining traffic has fallen by an average of about 3% a year. The declines in casual dining are, in large part, due to a shrinking middle class, which the segment primarily targets.

“The reason you’re seeing the negative guest counts in casual dining is because people don’t have the income they once had. The middle class doesn’t have the same buying power ... [that it did] 20 years ago.”

Malcolm Knapp, President
Knapp Track
Nation’s Restaurant News, 6/18/18

One bright spot for casual dining restaurants in takeout. According to Technomic (www.technomic.com), takeout accounts for 18% of adults’ traditional casual-dining restaurant orders.

“You’ve probably heard that casual dining is dying. You’ve probably also heard that casual dining is turning around while finding new and exciting niches. Both statements are true.”

Nation’s Restaurant News, 6/18/18

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; averages at mass-market casual brands are typically between $12 and $20.

According to the Family & Casual-Dining Consumer Trend Report, by Technomic, 36% of adults visit upscale casual-dining restaurants at least once a month.
Upscale-casual chains include Brio, Cheddar’s Scratch Kitchen, Joe’s Crab Shack, and Yard House.

“The success of restaurants at the higher end of the casual-dining segment reflects 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 benefiting from a shift in business entertaining – dining out with clients.”

Nation’s Restaurant News
CATERING & BANQUETS

32.1 Market Assessment

The National Restaurant Association (www.restaurant.org) assesses social caterers’ sales for 2019 at $9.4 billion, a 4.1% increase over the previous year.

Including hotel and on-premise banquets and other types of catering, the segment generates an estimated $17 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, 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 restaurant meals that offer creative, customizable and healthier food options without losing the simplicity.”

*Trends In Catering To The Office Crowd*
Restaurant Business
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 14,606 locations at year-end 2018 and $19.7 billion in revenue, dominates the segment.

Five other coffeehouse chains rank in the Top 250: Biggby Coffee, Caribou Coffee, Dutch Bros. Coffee, Peet's Coffee & Tea, and The Coffee Bean & Tea Leaf. Their combined sales are only 10% of Starbucks.

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. Flatbreads, small plates, and snacks are also menued to appeal to later-day snacking.

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.

Dutch Bros. Coffee has found a niche in the market with drive-thru-only service. The chain had $494 million in sales in 2018 with 328 locations.

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

COLLEGE CAMPUS DINING

34.1 Market Assessment

The National Restaurant Association (www.restaurant.org) assesses the annual college and university foodservice market at $18 billion.

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 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 would like their schools’ 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 October 2018 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. Columbia University (New York, NY)
2. Duke University (Durham, NC)
3. University of Pittsburgh (Pittsburgh, PA)
4. Johns Hopkins University (Baltimore, MD)
5. Liberty University (Lynchburg, VA)
6. Boston College (Chestnut Hill, MA)
7. University of Massachusetts Amherst (Amherst, MA)
8. Virginia Polytechnic Institute and State University (Blacksburg, VA)
9. University of Michigan (Ann Arbor, MI)
10. Northwestern University (Evanston, IL)
11. New York University (New York, NY)
12. Rutgers University (New Brunswick, NJ)
13. Wellesley College (Wellesley, MA)
14. University of Rochester (Rochester, NY)
15. Bowdoin College (Brunswick, ME)
16. Duquesne University (Pittsburgh, PA)
17. University of San Diego (San Diego, CA)
18. Michigan State University (East Lansing, MI)
19. University of Virginia (Charlottesville, VA)
20. George Mason University (Fairfax, VA)
21. Occidental College (Los Angeles, CA)
22. Boston University (Boston, MA)
23. Cornell University (Ithaca, NY)
24. Vanderbilt University (Nashville, TN)
25. James Madison University (Harrisonburg, VA)
26. University of Georgia (Athens, GA)
27. University of California, Los Angeles (Los Angeles, CA)
28. University of Connecticut (Storrs, CT)
29. Brown University (Providence, RI)
30. Emory University (Atlanta, GA)
31. University of California, San Diego (San Diego, CA)
32. University of South Carolina (Columbia, SC)
33. Yale University (New Haven, CT)
34. Harvard University (Cambridge, MA)
35. Pitzer College (Claremont, CA)
36. Stanford University (Stanford, CA)
37. Miami University (Oxford, OH)
38. University of Pennsylvania (Philadelphia, PA)
39. Massachusetts Institute of Technology (Cambridge, MA)
40. University of California, Berkeley (Berkeley, CA)
42. Colorado State University (Fort Collins, CO)
43. Rollins College (Winter Park, FL)
44. Rhode Island School of Design (Providence, RI)
45. Florida State University (Tallahassee, FL)
46. Purdue University (West Lafayette, IN)
47. University of Chicago (Chicago, IL)
48. Wesleyan University (Middletown, CT)
49. University of Kansas (Lawrence, KS)
50. Pennsylvania State University (University Park, PA)
51. Muhlenberg College (Allentown, PA)
52. University of Arizona (Tucson, AZ)
53. Georgia Institute of Technology (Atlanta, GA)
54. Princeton University (Princeton, NJ)
55. University of Alabama (Tuscaloosa, AL)
56. University of Houston (Houston, TX)
57. University of North Carolina at Chapel Hill (Chapel Hill, NC)
58. Roger Williams University (Bristol, RI)
59. Brigham Young University (Provo, UT)
60. Tufts University (Medford, MA)
61. University of Washington (Seattle, WA)
62. Tulane University (New Orleans, LA)
63. Saint Lawrence University (Canton, NY)
64. Bob Jones University (Greenville, SC)
65. College of the Atlantic (Bar Harbor, ME)
66. Temple University (Philadelphia, PA)
67. Bryn Mawr College (Bryn Mawr, PA)
68. Colby College (Waterville, ME)
69. University of California, Irvine (Irvine, CA)
70. University of California, Santa Barbara (Santa Barbara, CA)
71. Ohio University (Athens, OH)
72. Wheaton College (Wheaton, IL)
73. University of Southern California (Los Angeles, CA)
74. Denison University (Granville, OH)
75. Carleton College (Northfield, MN)

Annually, Niche (www.niche.com) ranks college food programs based on meal plan costs and student reviews. The 2019 Best College Food ranking is as follows:
1. Virginia Tech (Blacksburg, VA)
2. University of California at Los Angeles (Los Angeles, CA)
3. Bates College (Lewiston, ME)
4. Webber International University (Babson Park, FL)
5. University of Massachusetts - Amherst (Amherst, MA)
6. Bowdoin College (Brunswick, ME)
7. California Baptist University (Riverside, CA)
8. James Madison University (Harrisonburg, VA)
9. University of San Diego (San Diego, CA)
10. St. John Fisher College (Rochester, NY)
11. St. Norbert College (De Pere, WI)
12. Kendall College (Chicago, IL)
13. University of Georgia (Athens, GA)
14. Gustavus Adolphus College (Saint Peter, MN)
15. St. Olaf College (Northfield, MN)
16. Hendrix College (Conway, AR)
17. Wheaton College - Illinois (Wheaton, IL)
18. Cornell University (Ithaca, NY)
19. University of Oregon (Eugene, OR)
20. Liberty University (Lynchburg, VA)
21. Rice University (Houston, TX)
22. Wesleyan University (Middletown, CT)
23. University of New Hampshire (Durham, NH)
24. Kennesaw State University (Kennesaw, GA)
25. Ashland University (Ashland, OH)
26. Pomona College (Claremont, CA)
27. The Culinary Institute of America (Hyde Park, NY)
28. Seattle University (Seattle, WA)
29. College of St. Benedict (St. Joseph, MN)
30. Colorado College (Colorado Springs, CO)
31. Tufts University (Medford, MA)
32. Vanderbilt University (Nashville, TN)
33. Middlebury College (Middlebury, VT)
34. Purdue University (West Lafayette, IN)
35. University of Notre Dame (Notre Dame, IN)
36. Pitzer College (Claremont, CA)
37. The College of Idaho (Caldwell, ID)
38. Grand Canyon University (Phoenix, AZ)
39. University of Dayton (Dayton, OH)
40. University of Wisconsin (Madison, WI)
41. University of Colorado - Boulder (Boulder, CO)
42. Roger Williams University (Bristol, RI)
43. Concordia College (Moorhead, MN)
44. Andrews University (Berrien Springs, MI)
45. University of Northern Iowa (Cedar Falls, IA)
46. Skidmore College (Saratoga Springs, NY)
47. Bethel University (Saint Paul, MN)
48. Gettysburg College (Gettysburg, PA)
49. Occidental College (Los Angeles, CA)
50. Bryn Mawr College (Bryn Mawr, PA)
51. University of Michigan - Ann Arbor (Ann Arbor, MI)
52. Lawrence University (Appleton, WI)
53. University of North Texas (Denton, TX)
54. William Jessup University (Rocklin, CA)
55. High Point University (High Point, NC)
56. Muhlenberg College (Allentown, PA)
57. Scripps College (Claremont, CA)
58. University of Scranton (Scranton, PA)
59. Boston University (Boston, MA)
60. University of California - Davis (Davis, CA)
61. University of Richmond (Richmond, VA)
62. Stanford University (Stanford, CA)
63. Ball State University (Muncie, IN)
64. Sullivan University (Louisville, KY)
65. Florida International University (Miami, FL)
66. Saint Anselm College (Manchester, NH)
67. Arkansas Tech University (Russellville, AR)
68. Southern Louisiana University (Hammond, LA)
69. Ohio State University (Columbus, OH)
70. Bellevue University (Bellevue, NE)
71. Ohio University (Athens, OH)
72. Maranatha Baptist University (Watertown, WI)
73. University of St. Thomas (Saint Paul, MN)
74. Brigham Young University (Provo, UT)
75. Michigan State University (East Lansing, MI)
76. Lewis & Clark College (Portland, OR)
77. Monroe College (Bronx, NY)
78. Rhode Island School of Design (Providence, RI)
79. New York University (New York, NY)
80. Rollins College (Winter Park, FL)
81. University of Oklahoma (Norman, OK)
82. Southern New Hampshire University (Manchester, NH)
83. Whitman College (Walla Walla, WA)
84. Pennsylvania College of Technology (Williamsport, PA)
85. University of Arkansas - Fort Smith (Fort Smith, AR)
86. St. Mary’s College of Maryland (St. Mary’s City, MD)
87. Ohio Christian University (Circleville, OH)
88. University of Memphis (Memphis, TN)
89. Florida Southwestern State College (Fort Myers, FL)
90. University of Missouri (Columbia, MO)
91. University of Texas - San Antonio (San Antonio, TX)
92. Kansas State University (Manhattan, KS)
93. SUNY University at Buffalo (Buffalo, NY)
94. Georgia Gwinnett College (Lawrenceville, GA)
95. University of Texas (Austin, TX)
96. Cornish College of the Arts (Seattle, WA)
97. University of Central Florida (Orlando, FL)
98. Texas Tech University (Lubbock, TX)
99. University of Antelope Valley (Lancaster, CA)
100. Mount Holyoke College (South Hadley, MA)
CONTRACT-MANAGED FOODSERVICE

35.1 Profile

The National Restaurant Association (www.restaurant.org) assessed food and drink revenue for contract-managed foodservices at $58 billion; the annual growth rate is about 4%. Distribution is follows:

- Colleges and universities: $19 billion
- Manufacturing and industrial plants: $10 billion
- Primary and secondary schools: $8 billion
- Recreation and sports centers: $8 billion
- Hospitals and nursing homes: $7 billion
- Commercial and office buildings: $4 billion
- In-transit foodservice (airlines): $3 billion

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)

RENS杂AURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2020-2021
• 188 •
36.1 Market Assessment

According to the National Association of Convenience Stores (NACS, www.nacsonline.com), there were approximately 153,000 convenience stores (c-stores) in the United States as of June 2019. 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.

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

“For a decade or more, convenience store chains have been beefing up their foodservice offerings and posing a growing competitive threat to restaurants. Chains deliver pizza, serve up chicken bowls, and continue to innovate.”

Nation’s Restaurant News, 2/12/18
36.2 Market Leaders

The following convenience stores have the highest foodservice sales (source: Nation’s Restaurant News, June 2019):

<table>
<thead>
<tr>
<th></th>
<th>Foodservice Sales</th>
<th>Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>7-Eleven</td>
<td>$2.45 billion</td>
<td>7,963</td>
</tr>
<tr>
<td>Wawa</td>
<td>$1.97 billion</td>
<td>789</td>
</tr>
<tr>
<td>Casey’s General Stores</td>
<td>$1.01 billion</td>
<td>2,041</td>
</tr>
<tr>
<td>Circle K</td>
<td>$ 975 million</td>
<td>4,463</td>
</tr>
<tr>
<td>Sheetz</td>
<td>$ 774 million</td>
<td>560</td>
</tr>
<tr>
<td>Stripes</td>
<td>$ 375 million</td>
<td>733</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%.

_________________________________________________________________

"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*, 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.

“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*

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

FAMILY-DINING RESTAURANTS

37.1 Overview
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.

“These full-service chains capitalize on consumer trends, like freshly prepared foods, to lead growth sales.”

Nation’s Restaurant News, 6/18/18

37.2 Market Assessment
According to Technomic (www.technomic.com), family-style restaurants account for $33 billion in annual sales. The segment’s sales have been relatively flat since 2010.

Seventeen (17) family-dining chains rank among the 250 largest U.S. restaurant chains, according to Restaurant Business (June 2019). Their combined annual sales are $13.7 billion. These chains are as follows:
• Big Boy/Frisch's Big Boy
• Black Bear Diner
• Bob Evans
• Cracker Barrel
• Denny's
• Eat'n Park
• First Watch
• Friendly's
• Huddle House
First Watch is the fastest-growing chain in the segment, with 31.9% growth in 2018.

37.3 Analysis

According to the *Family & Casual-Dining Consumer Trend Report*, by Technomic, 23% of adults dine at a family-style restaurant because of their menu variety.

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.
38.1 Overview

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 for customer satisfaction.

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.

According to the Directory of Chain Restaurant Operators, by Chain Store Guide (www.chainstoreguide.com), there are 26,519 fast-casual chain units in the U.S.

38.2 Market Assessment

According to The NPD Group (www.npd.com), the fast-casual share of total U.S. restaurant traffic has been as follows:

- 2006: 2.6%
- 2007: 2.9%
- 2008: 3.1%
- 2009: 3.6%
- 2010: 3.8%
- 2011: 4.0%
- 2012: 4.3%
- 2013: 4.7%
- 2014: 5.0%
- 2015: 5.4%
- 2016: 5.7%
- 2017: 5.9%
- 2018: 6.1%

Overall, fast-casual chains ranked among the 500 largest restaurant chains by Technomic (www.tecnomic.com), generating $42.2 billion in total U.S. sales in 2018, up 8% from the year before. Growth was 8% in 2017.

The 500 largest chains as a whole added 1,569 restaurants in 2018. The fast-casual sector alone added more than 1,200 locations. That means almost four out of every five restaurants opened by Top 500 chains in 2018 was a fast-casual concept.
“The fast-casual sector’s growth might be slowing. But it’s certainly not stopping. Fast-casual chains continued to drive and build sales in 2018, and the segment’s unit growth far outpaced the rest of the industry.”

Restaurant Business, 5/2/19

38.3 Unit And Traffic Growth

According to The NPD Group, there were 25,312 fast-casual chain locations in September 2018, a 1% increase from a year prior. The metropolitan areas with the most fast-casual units were as follows (change from prior year in parenthesis):

- Los Angeles, CA: 2,002 (2%)
- Dallas-Fort Worth, TX: 1,146 (-1%)
- New York, NY: 1,052 (-1%)
- Chicago, IL: 956 (2%)
- Washington, DC: 884 (1%)

In the year ending February 2019 compared to the prior year, fast casual customers increased their visits by 3%, while the total quick service restaurant category, under which the fast casual category falls, were up 1% and total U.S. foodservice traffic remained flat.

“The fast casual category is still a relatively small slice of the total foodservice industry. Fast casual restaurants represent 8% of total quick service visits, whereas traditional quick service restaurants represent 75% of traffic, and quick service retail, like prepared foods available in grocery stores, represents 17%.”

The NPD Group, 4/22/19
38.4 Market Leaders

The largest restaurant chains, ranked by U.S. systemwide sales, are as follows (source: Restaurant Business, June 2019):

<table>
<thead>
<tr>
<th></th>
<th>Sales</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Panera Bread</td>
<td>$ 5.76 billion</td>
<td>2,074</td>
</tr>
<tr>
<td>Chipotle Mexican Grill</td>
<td>$ 4.80 billion</td>
<td>2,452</td>
</tr>
<tr>
<td>Panda Express</td>
<td>$ 3.52 billion</td>
<td>2,105</td>
</tr>
<tr>
<td>Jimmy John's Gourmet Sandwiches</td>
<td>$ 2.16 billion</td>
<td>2,840</td>
</tr>
<tr>
<td>Zaxby's</td>
<td>$ 1.84 billion</td>
<td>906</td>
</tr>
<tr>
<td>Five Guys Burgers and Fries</td>
<td>$ 1.61 billion</td>
<td>1,358</td>
</tr>
<tr>
<td>Wingstop</td>
<td>$ 1.20 billion</td>
<td>1,124</td>
</tr>
<tr>
<td>Raising Cane's Chicken Fingers</td>
<td>$ 1.18 billion</td>
<td>400</td>
</tr>
<tr>
<td>Jersey Mike's Subs</td>
<td>$ 1.14 billion</td>
<td>1,494</td>
</tr>
<tr>
<td>Qdoba Mexican Eats</td>
<td>$ 835 million</td>
<td>743</td>
</tr>
</tbody>
</table>

Sales growth in 2018 among the top three chains was 4.8%, 8.7%, and 13.1%, respectively.

38.5 Comparison of Quick-Service and Fast-Casual

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

<table>
<thead>
<tr>
<th></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 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 market share, 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. Americans took 2.3 billion person-trips in 2018, an all-time record, according to the U.S. Travel Association (www.ustravel.org). Traveler spending was also at an all-time high in 2018, reaching $1.09 trillion ($933 billion in domestic travel spending and $166 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. Travelers and tourists represent an average of 29% of sales for fine-dining operators, according to the National Restaurant Association (www.restaurant.org).

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.restaurant-rx.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

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FOOD CONCESSIONS AT AIRPORTS

40.1 Market Assessment

According to ARN Fact Book, published by Airport Revenue News (www.airportrevenuenews.com), annual food and beverage service at the 90 largest U.S. airports is $5.1 billion. The following airports have the highest food and beverage sales:

- Hartsfield-Jackson Atlanta International Airport: $363.6 million
- Los Angeles International Airport: $354.3 million
- Chicago O’Hare International Airport: $327.3 million
- John F. Kennedy International Airport (New York City): $271.0 million
- San Francisco International Airport: $252.5 million
- Denver International Airport: $250.1 million
- Dallas-Fort Worth International Airport: $221.4 million
- McCarran International Airport - Las Vegas: $199.1 million
- Newark Liberty International Airport: $197.3 million
- Seattle-Tacoma International Airport: $176.3 million

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

____________________________________________________________

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

Rick Lundstrom, Editor in Chief
PAX International
40.2 Market Leaders

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

The Daily Meal (www.thedailymeal.com) ranked the best airport restaurants in 2019 as follows:

1. The Salt Lick BBQ (Austin-Bergstorm International Airport & Dallas/Fort Worth International Airport)
2. One Flew South (Hartsfield-Jackson Atlanta International Airport)
3. The Larder at Tavern (Los Angeles International Airport)
4. Obricky’s (Baltimore/Washington International Thurgood Marshall Airport)
5. Columbia Restaurant Café (Tampa International Airport)
6. Chicken+Beer (Hartsfield-Jackson Atlanta International Airport)
7. Tortas Frontera (Chicago O’Hare International Airport)
8. Root Down (Denver International Airport)
9. Legal Sea Foods (Logan International Airport)
10. Napa Farms Market (San Francisco International Airport)
11. Uptown Brasserie (John F. Kennedy International Airport)
12. ink.sack (Los Angeles International Airport)
13. Crust (LaGuardia International Airport)
15. Ike’s Food and Cocktails (Minneapolis-St. Paul International Airport)
16. Icebox Cafe (Miami International Airport & Dallas/Fort Worth International Airport)
17. Cat Cora’s Kitchen (San Francisco International Airport, George Bush Intercontinental Airport, Salt Lake City International Airport, and Hartsfield-Jackson International Airport)
18. Café Versailles (Miami International Airport)
19. Matt’s Big Breakfast (Phoenix Sky Harbor International Airport)
20. Berghoff Café (Chicago O’Hare International Airport)
21. Dooky Chase’s Restaurant (Louis Armstrong New Orleans International Airport)
22. Ben’s Chili Bowl (Ronald Reagan Washington National Airport)
23. Deep Blue Sushi (John F. Kennedy International Airport)
24. Beecher’s Handmade Cheese (Seattle-Tacoma International Airport)
25. Minnow (LaGuardia International Airport)

According to *Travel + Leisure* (March 2019), the best restaurants at the largest U.S. airports are as follows:

*RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2020-2021*
- Baltimore-Washington International Airport: Flying Dog Tap House
- Charlotte Douglas International Airport: Beaudevin
- Dallas/Fort Worth International Airport: Pappadeaux Seafood Kitchen
- Denver International Airport: Root Down
- Detroit Metropolitan Airport: Cat Cora’s Taproom
- Fort Lauderdale-Hollywood International Airport: BurgerFi
- George Bush Intercontinental Airport - Houston: Gavi
- Hartsfield-Jackson Atlanta International Airport: One Flew South
- John F. Kennedy International Airport - New York: Shake Shack
- LaGuardia Airport - New York: Sorentine Panini Bar
- Logan International Airport - Boston: Legal Sea Foods
- Los Angeles International Airport: James’ Beach
- McCarran International Airport - Las Vegas: Rachel’s Kitchen
- Miami International Airport: Corona Beach House
- Midway International Airport - Chicago: Gold Coast Dogs
- Minneapolis-Saint Paul International Airport: Stone Arch
- Newark Liberty International Airport: Vino Volo
- O’Hare International Airport - Chicago: Farmer’s Fridge
- Orlando International Airport: McCoy’s Bar & Grill
- Philadelphia International Airport: Legal Sea Foods
- Phoenix Sky Harbor International Airport: Olive & Ivy
- Salt Lake City International Airport: Cat Cora’s Kitchen
- San Francisco International Airport: Tyler Florence Rotisserie
- Seattle-Tacoma International Airport: Floret
- Washington Dulles International Airport: Vino Volo

40.3 Market Resources
Airport Experience News, 6421 Congress Avenue, Suite 107, Boca Raton, FL 33487. (561) 257-1026. (www.airportxnews.com)
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. Over the past five years (2005-2019), food and beverage spending has ranged from $5.0 billion to $6.8 billion and $72 to $95 per capita. This spending includes 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:

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### Stadiums

<table>
<thead>
<tr>
<th></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>

### Arenas

<table>
<thead>
<tr>
<th></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 Favorite Concession Foods And Beverages

A 2018 survey by the National Association of Concessionaires (NAC; www.naconline.org) found the favorite food and beverage items at stadiums and arenas as follows:

- Hot dogs: 17%
- Hamburgers: 17%
- Soft drinks: 10%
- Pizza: 9%

Items that patrons want added to menus are as follows:

- French fries: 24%
- Coffee: 17%
- Fruit and veggies: 14%
- Chips: 13%

### 41.4 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)

10 Best (www.10best.com), a USA Today travel site, ranked the best stadium food in 2018 as follows:
• Momochi Nachos (Progressive Field; Cleveland, OH)
• Lobster Roll (Fenway Park; Boston, MA)
• 4 Bells Shrimp Boil (Target Field; Minneapolis, MN)
• Mama’s Italian Special Hero (Citi Field; New York, NY)
• Ben’s Chili Bowl Half-Smoke (Nationals Park; Washington, DC)
• Ole 29er (PPG Paints Arena; Pittsburgh, PA)
• Bacon Blitz Bread (Lambeau Field; Green Bay, WI)
• Tony Luke’s Cheesesteak (Citizens Bank Park; Philadelphia, PA)
• Hot Chicken Mac & Cheese (Bridgestone Arena; Nashville, TN)
• Primanti Sandwich (PNC Park; Pittsburgh, PA)

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

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 2018 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

41.5 In-Seat Ordering
The National Association of Concessionaires found that 77% of stadium and arena patrons are disappointed when ballparks, stadiums, and arenas don’t offer in-seat ordering.

“In-seat ordering, however, has been tough to implement, including getting fans to download and use apps. There is a difference between people’s appetite for in-seat apps and their actual usage.”

Paul Pettas, Director
Centerplate
SportsBusiness Journal, 10/15/18
41.6 Market Resources
National Association of Concessionaires, 180 N. Michigan Avenue, Suite 2215, Chicago, IL 60601. (312) 236-3858. (www.naconline.org)
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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. The most common are 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 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.

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

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.

### 42.3 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, with little incentive to provide upscale options. In recent years, 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](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](http://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](http://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.

### 42.4 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)

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

43.2 Food Hall Census And Projections
Matador Network (www.matadornetwork.com) assesses that there were about 210 food halls in the U.S. in 2019, double the number in 2016.
Cushman & Wakefield (www.cushmanwakefield.com) projects that there will be 300 or more food halls of 10,000 sq. ft. to 50,000 sq. ft. in North America by 2020.
“Food halls are spreading like malls in the ‘80s.”
Matador Network, 10/22/18

43.3 Top Food Halls
The following are among the best food halls in the U.S. (source: Matador Network):
- 1-800-LUCKY (Wynwood District; Miami, FL)
- Dekalb Market (Brooklyn, NY)
- Grand Central Market (Los Angeles, CA)
- Indianapolis City Market (Indianapolis, IN)
- Latinicity Food Hall (Chicago, IL)
- Legacy Food Hall (Plano, TX)
- Pike Place Market (Seattle, WA)
- Ponce City Market (Atlanta, GA)
- Shirokiya Japan Village Walk (Honolulu, HI)
- The Pizitz Food Hall (Birmingham, AL)

43.4 Market Resources
Food Halls Of North America, Cushman & Wakefield, April 2018.
FOOD TRUCKS

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 more than $5 billion, an increase from virtually zero only seven 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

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, Oregon, 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>
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<tr>
<td>Boston, MA:</td>
<td>59</td>
<td>9.3</td>
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<td>Chicago, IL:</td>
<td>80</td>
<td>3.0</td>
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<td>8.3</td>
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<td>Denver, CO:</td>
<td>113</td>
<td>17.8</td>
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<td>Honolulu, HI:</td>
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<tr>
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<td>70</td>
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<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>
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<tr>
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<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>
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<tr>
<td>Portland, OR:</td>
<td>51</td>
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</tr>
<tr>
<td>Sacramento, CA:</td>
<td>39</td>
<td>8.2</td>
</tr>
<tr>
<td>San Antonio, TX:</td>
<td>61</td>
<td>4.4</td>
</tr>
</tbody>
</table>
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.

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.

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 2018 is as follows:

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

Over three billion pizzas were sold in the United States in 2018, according to the National Association of Pizza Operators (NAPO, www.pizzatoday.com).

According to a recent Gallup Poll, kids between the ages of 3 to 11 prefer pizza over all other food groups for lunch and dinner.

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.

The number of pizzerias in the United States has been as follows (source: Statistica [www.statistica.com]):

- 2012: 71,856
- 2013: 71,387
- 2014: 73,097
- 2015: 74,812
- 2016: 76,723
- 2017: 75,243
- 2018: 76,993

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 purchase 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 2018 sales were $6.6 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 food orders are further assessed in Chapter 84 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.

“In the crowded fast-casual pizza space, two chains appear to have emerged as dominant leaders: MOD Pizza and Blaze Fast Fire’d Pizza.”

*Nation’s Restaurant News, 4/2/18*

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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)
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%.

Fast Food Consumption Among Adults In The United States, published in October 2018 by the National Center for Health Statistics (www.cdc.gov/nchs), reported that 37% of adults eat fast food on an average day. By age, those that do so are as follows:

- 20-to-39: 45%
- 40-to-59: 38%
- 60 and older: 24%

“Nearly everyone consumes fast food. Quick-service restaurant customers in the U.S. span all levels of wealth, income, age and region.”

Prof. Jay Zagorsky, Ohio State University, and Prof. Patricia Smith, University of Michigan
The Association Between Socioeconomic Status and Adult Fast-Food Consumption in the U.S., 2018
46.2 Market Assessment

The National Restaurant Association (www.restaurant.org) assesses quick-service restaurant sales in 2019 at $246.7 billion, a 3.2% increase over the previous year.


46.3 The QSR Customer

According to the 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:
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.

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.

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 of prepared foods have grown 30% since 2008, according to The NPD Group.

A Look Into The Future Of Foodservice, a report by The NPD Group, projects HMR spending to increase 10% annually through 2022.

“The already heated competition among restaurant chains is about to get hotter. The biggest threat to market share comes not from a segment competitor, but from outside the industry. Grocers are increasingly blurring the line with restaurants.”

Nation’s Restaurant News, 10/16/18
47.2 The Prepared Food Customer

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.

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.

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.

• Wegmans stores have a sprawling Market Cafe area where customers have an extensive selection of prepared foods for consumption in an adjacent dining area. Wegmans’ outlet in Providence, Rhode Island, includes The Pub, a table-service restaurant and bar.

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

In April 2019, Whole Foods Market opened its 500th store, a midtown Atlanta location that serves as the flagship for the Southern region. The four-level store houses four fast-casual eateries. The store features a range of food bars with seasonal dishes and options for special diets. Farm Burger, with a menu focused on 100% locally sourced, grass-fed and grass-finished beef burgers, opened at the store through the Friends of Whole Foods Market program, in which the supermarket chain partners with outside culinary and lifestyle brands to bring shoppers unique experiences. Situated on a rooftop terrace with skyline views, Canopy Court offers stadium seating, games and TVs, with a food truck that serves an assortment of wines, local beers, and a rotating food menu.
PART VII: MARKET LEADERS
### 48.1 Overview

Technomic ([www.technomic.com](http://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.

### 48.2 Largest Chains

The largest restaurant chains, ranked by U.S. systemwide sales, are as follows (source: *Restaurant Business*, June 2019):

<table>
<thead>
<tr>
<th>Rank</th>
<th>Name</th>
<th>Sales</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>McDonald's</td>
<td>$38.52 billion</td>
<td>13,914</td>
</tr>
<tr>
<td>2.</td>
<td>Starbucks</td>
<td>$19.66 billion</td>
<td>14,606</td>
</tr>
<tr>
<td>3.</td>
<td>Subway</td>
<td>$10.41 billion</td>
<td>24,798</td>
</tr>
<tr>
<td>4.</td>
<td>Taco Bell</td>
<td>$10.36 billion</td>
<td>6,588</td>
</tr>
<tr>
<td>5.</td>
<td>Chick-fil-A</td>
<td>$10.18 billion</td>
<td>2,370</td>
</tr>
<tr>
<td>6.</td>
<td>Burger King</td>
<td>$ 9.93 billion</td>
<td>7,330</td>
</tr>
<tr>
<td>7.</td>
<td>Wendy’s</td>
<td>$ 9.40 billion</td>
<td>5,810</td>
</tr>
<tr>
<td>8.</td>
<td>Dunkin’</td>
<td>$ 8.78 billion</td>
<td>9,419</td>
</tr>
<tr>
<td>9.</td>
<td>Domino’s</td>
<td>$ 6.59 billion</td>
<td>5,876</td>
</tr>
<tr>
<td>10.</td>
<td>Panera Bread</td>
<td>$ 5.76 billion</td>
<td>2,074</td>
</tr>
<tr>
<td>11.</td>
<td>Pizza Hut</td>
<td>$ 5.52 billion</td>
<td>7,482</td>
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<tr>
<td>12.</td>
<td>Chipotle Mexican Grill</td>
<td>$ 4.80 billion</td>
<td>2,452</td>
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<td>13.</td>
<td>Sonic Drive-In</td>
<td>$ 4.44 billion</td>
<td>3,606</td>
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<tr>
<td>14.</td>
<td>KFC</td>
<td>$ 4.43 billion</td>
<td>4,074</td>
</tr>
<tr>
<td>15.</td>
<td>Applebee's</td>
<td>$ 4.21 billion</td>
<td>1,693</td>
</tr>
<tr>
<td>16.</td>
<td>Olive Garden</td>
<td>$ 4.08 billion</td>
<td>855</td>
</tr>
<tr>
<td>17.</td>
<td>Arby's</td>
<td>$ 3.88 billion</td>
<td>3,329</td>
</tr>
<tr>
<td>18.</td>
<td>Little Caesars</td>
<td>$ 3.82 billion</td>
<td>4,350</td>
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<tr>
<td>19.</td>
<td>Buffalo Wild Wings</td>
<td>$ 3.79 billion</td>
<td>1,208</td>
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<tr>
<td>20.</td>
<td>Dairy Queen</td>
<td>$ 3.65 billion</td>
<td>4,406</td>
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<tr>
<td>21.</td>
<td>Panda Express</td>
<td>$ 3.52 billion</td>
<td>2,105</td>
</tr>
<tr>
<td>22.</td>
<td>Chili's Grill &amp; Bar</td>
<td>$ 3.50 billion</td>
<td>1,251</td>
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<tr>
<td>Rank</td>
<td>Restaurant</td>
<td>Revenue</td>
<td>Locations</td>
</tr>
<tr>
<td>------</td>
<td>-------------------------------------------</td>
<td>------------</td>
<td>-----------</td>
</tr>
<tr>
<td>23.</td>
<td>Jack in the Box:</td>
<td>$3.46 billion</td>
<td>2,237</td>
</tr>
<tr>
<td>24.</td>
<td>IHOP:</td>
<td>$3.23 billion</td>
<td>1705</td>
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<tr>
<td>25.</td>
<td>Popeyes Louisiana Kitchen:</td>
<td>$3.22 billion</td>
<td>2,347</td>
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<tr>
<td>26.</td>
<td>Texas Roadhouse:</td>
<td>$2.72 billion</td>
<td>533</td>
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<tr>
<td>27.</td>
<td>Papa John's:</td>
<td>$2.71 billion</td>
<td>3,199</td>
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<tr>
<td>28.</td>
<td>Denny's:</td>
<td>$2.66 billion</td>
<td>1,578</td>
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<tr>
<td>29.</td>
<td>Outback Steakhouse:</td>
<td>$2.61 billion</td>
<td>733</td>
</tr>
<tr>
<td>30.</td>
<td>Cracker Barrel:</td>
<td>$2.43 billion</td>
<td>655</td>
</tr>
<tr>
<td>31.</td>
<td>Whataburger:</td>
<td>$2.41 billion</td>
<td>825</td>
</tr>
<tr>
<td>32.</td>
<td>Red Lobster:</td>
<td>$2.40 billion</td>
<td>678</td>
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<tr>
<td>33.</td>
<td>Jimmy John's Gourmet Sandwiches:</td>
<td>$2.16 billion</td>
<td>2,840</td>
</tr>
<tr>
<td>34.</td>
<td>The Cheesecake Factory:</td>
<td>$2.12 billion</td>
<td>201</td>
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<tr>
<td>35.</td>
<td>Hardee's:</td>
<td>$2.11 billion</td>
<td>1,875</td>
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<tr>
<td>36.</td>
<td>Zaxby's:</td>
<td>$1.84 billion</td>
<td>906</td>
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<tr>
<td>37.</td>
<td>LongHorn Steakhouse:</td>
<td>$1.75 billion</td>
<td>520</td>
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<tr>
<td>38.</td>
<td>Golden Corral:</td>
<td>$1.73 billion</td>
<td>489</td>
</tr>
<tr>
<td>39.</td>
<td>Five Guys Burgers and Fries:</td>
<td>$1.61 billion</td>
<td>1,358</td>
</tr>
<tr>
<td>40.</td>
<td>Culver's:</td>
<td>$1.57 billion</td>
<td>686</td>
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<tr>
<td>41.</td>
<td>Red Robin Gourmet Burgers and Brews:</td>
<td>$1.50 billion</td>
<td>555</td>
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<tr>
<td>42.</td>
<td>Carl's Jr.:</td>
<td>$1.41 billion</td>
<td>1,148</td>
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<tr>
<td>43.</td>
<td>Waffle House:</td>
<td>$1.30 billion</td>
<td>1,936</td>
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<tr>
<td>44.</td>
<td>Bojangles':</td>
<td>$1.29 billion</td>
<td>756</td>
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<tr>
<td>45.</td>
<td>Wingstop:</td>
<td>$1.20 billion</td>
<td>1,124</td>
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<tr>
<td>46.</td>
<td>Raising Cane's Chicken Fingers:</td>
<td>$1.18 billion</td>
<td>400</td>
</tr>
<tr>
<td>47.</td>
<td>TGI Fridays:</td>
<td>$1.18 billion</td>
<td>424</td>
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<tr>
<td>48.</td>
<td>Jersey Mike's Subs:</td>
<td>$1.14 billion</td>
<td>1,494</td>
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<tr>
<td>49.</td>
<td>BJ's Restaurant &amp; Brewhouse:</td>
<td>$1.11 billion</td>
<td>202</td>
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<tr>
<td>50.</td>
<td>Steak 'n Shake:</td>
<td>$1.03 billion</td>
<td>594</td>
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<tr>
<td>51.</td>
<td>In-N-Out Burger:</td>
<td>$926 million</td>
<td>339</td>
</tr>
<tr>
<td>52.</td>
<td>P.F. Chang's:</td>
<td>$877 million</td>
<td>216</td>
</tr>
<tr>
<td>53.</td>
<td>El Pollo Loco:</td>
<td>$868 million</td>
<td>484</td>
</tr>
<tr>
<td>54.</td>
<td>Bob Evans:</td>
<td>$838 million</td>
<td>481</td>
</tr>
<tr>
<td>55.</td>
<td>Qdoba Mexican Eats:</td>
<td>$835 million</td>
<td>743</td>
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<tr>
<td>56.</td>
<td>Del Taco:</td>
<td>$817 million</td>
<td>580</td>
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<tr>
<td>57.</td>
<td>Krispy Kreme:</td>
<td>$805 million</td>
<td>355</td>
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<td>58.</td>
<td>Hooters:</td>
<td>$798 million</td>
<td>338</td>
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<tr>
<td>59.</td>
<td>Papa Murphy's Pizza:</td>
<td>$795 million</td>
<td>1,400</td>
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<tr>
<td>60.</td>
<td>Firehouse Subs:</td>
<td>$794 million</td>
<td>1,133</td>
</tr>
<tr>
<td>61.</td>
<td>Tim Hortons:</td>
<td>$750 million</td>
<td>738</td>
</tr>
<tr>
<td>62.</td>
<td>Ruth's Chris Steak House:</td>
<td>$748 million</td>
<td>134</td>
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<tr>
<td>63.</td>
<td>Church's Chicken:</td>
<td>$747 million</td>
<td>1,045</td>
</tr>
<tr>
<td>64.</td>
<td>Moe's Southwest Grill:</td>
<td>$739 million</td>
<td>727</td>
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<tr>
<td>65.</td>
<td>Cheddar's Scratch Kitchen:</td>
<td>$728 million</td>
<td>170</td>
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<td>Jason's Deli:</td>
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</tr>
<tr>
<td>Rank</td>
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<td>Revenue (Million)</td>
<td>Profit (Million)</td>
</tr>
<tr>
<td>------</td>
<td>----------------------------------------------</td>
<td>-------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>67</td>
<td>Ruby Tuesday:</td>
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<td>491</td>
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<td>McAlister's Deli:</td>
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<td>430</td>
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<td>Carrabba's Italian Grill:</td>
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<td>227</td>
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<tr>
<td>70</td>
<td>California Pizza Kitchen:</td>
<td>$639</td>
<td>205</td>
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<tr>
<td>71</td>
<td>Baskin-Robbins:</td>
<td>$611</td>
<td>2,550</td>
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<tr>
<td>72</td>
<td>Perkins Restaurant &amp; Bakery:</td>
<td>$603</td>
<td>355</td>
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<td>Marco's Pizza:</td>
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<td>883</td>
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<td>Bonefish Grill:</td>
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<td>Yard House:</td>
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<td>Checkers Drive-In Restaurants:</td>
<td>$560</td>
<td>590</td>
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<td>Auntie Anne's:</td>
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<td>1,295</td>
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<td>Boston Market:</td>
<td>$557</td>
<td>454</td>
</tr>
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<td>Captain D's Seafood Kitchen:</td>
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<td>White Castle:</td>
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<td>Dave &amp; Buster's:</td>
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<td>82</td>
<td>Noodles &amp; Co.:</td>
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<td>Logan's Roadhouse:</td>
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<td>690</td>
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<td>Einstein Bros. Bagels:</td>
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<td>Dutch Bros. Coffee:</td>
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<td>Jamba Juice:</td>
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<td>Freddy's Frozen Custard &amp; Steakburgers:</td>
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<td>Tropical Smoothie Cafe:</td>
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<td>O'Charley's:</td>
<td>$459</td>
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</tr>
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<td>90</td>
<td>Shake Shack:</td>
<td>$452</td>
<td>470</td>
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<td>91</td>
<td>Potbelly Sandwich Shop:</td>
<td>$441</td>
<td>58</td>
</tr>
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<td>92</td>
<td>The Capital Grille:</td>
<td>$440</td>
<td>871</td>
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<td>Long John Silver's:</td>
<td>$437</td>
<td>247</td>
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<td>94</td>
<td>The Habit Burger Grill:</td>
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<td>427</td>
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<td>95</td>
<td>Round Table Pizza:</td>
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<tr>
<td>96</td>
<td>Mellow Mushroom:</td>
<td>$416</td>
<td>901</td>
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<td>97</td>
<td>Smoothie King:</td>
<td>$415</td>
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<td>98</td>
<td>Miller's Ale House:</td>
<td>$414</td>
<td>52</td>
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<td>99</td>
<td>Maggiano's Little Italy:</td>
<td>$413</td>
<td>295</td>
</tr>
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<td>100</td>
<td>First Watch:</td>
<td>$410</td>
<td>548</td>
</tr>
<tr>
<td>101</td>
<td>Hungry Howie's Pizza:</td>
<td>$401</td>
<td>526</td>
</tr>
<tr>
<td>102</td>
<td>Dickey's Barbecue Pit:</td>
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<td>530</td>
</tr>
<tr>
<td>103</td>
<td>Charleys Philly Steaks:</td>
<td>$381</td>
<td>100</td>
</tr>
<tr>
<td>104</td>
<td>Chuy's:</td>
<td>$383</td>
<td>57</td>
</tr>
<tr>
<td>105</td>
<td>MOD Pizza:</td>
<td>$377</td>
<td>356</td>
</tr>
<tr>
<td>106</td>
<td>Pollo Tropical:</td>
<td>$374</td>
<td>917</td>
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<tr>
<td></td>
<td>RESTAURANT</td>
<td>REVENUE</td>
<td>OPENING</td>
</tr>
<tr>
<td>---</td>
<td>---------------------</td>
<td>-----------</td>
<td>----------</td>
</tr>
<tr>
<td>111.</td>
<td>Zoës Kitchen:</td>
<td>$372 million</td>
<td>260</td>
</tr>
<tr>
<td>112.</td>
<td>Taco John's:</td>
<td>$371 million</td>
<td>392</td>
</tr>
<tr>
<td>113.</td>
<td>Pappadeaux Seafood Kitchen:</td>
<td>$365 million</td>
<td>40</td>
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<tr>
<td>114.</td>
<td>Corner Bakery Cafe:</td>
<td>$362 million</td>
<td>182</td>
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<tr>
<td>115.</td>
<td>Famous Dave's:</td>
<td>$358 million</td>
<td>144</td>
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<tr>
<td>116.</td>
<td>Jet's Pizza:</td>
<td>$356 million</td>
<td>397</td>
</tr>
<tr>
<td>117.</td>
<td>Schlotzsky's:</td>
<td>$351 million</td>
<td>372</td>
</tr>
<tr>
<td>118.</td>
<td>Cicis:</td>
<td>$350 million</td>
<td>423</td>
</tr>
<tr>
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<td>Saltgrass Steak House:</td>
<td>$349 million</td>
<td>80</td>
</tr>
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<td>120.</td>
<td>On The Border Mexican Grill &amp; Cantina:</td>
<td>$348 million</td>
<td>143</td>
</tr>
<tr>
<td>121.</td>
<td>Village Inn:</td>
<td>$347 million</td>
<td>209</td>
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<tr>
<td>122.</td>
<td>Twin Peaks:</td>
<td>$343 million</td>
<td>84</td>
</tr>
<tr>
<td>123.</td>
<td>Au Bon Pain:</td>
<td>$339 million</td>
<td>213</td>
</tr>
<tr>
<td>124.</td>
<td>Texas de Brazil Churrascaria:</td>
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<td>53</td>
</tr>
<tr>
<td>125.</td>
<td>Blaze Pizza:</td>
<td>$326 million</td>
<td>296</td>
</tr>
<tr>
<td>126.</td>
<td>Taco Cabana:</td>
<td>$324 million</td>
<td>170</td>
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<tr>
<td>127.</td>
<td>Bar Louie:</td>
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<td>134</td>
</tr>
<tr>
<td>128.</td>
<td>Pei Wei Asian Diner:</td>
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</tr>
<tr>
<td>129.</td>
<td>Ninety Nine Restaurants:</td>
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<td>105</td>
</tr>
<tr>
<td>130.</td>
<td>Fleming's Prime Steakhouse &amp; Wine Bar:</td>
<td>$304 million</td>
<td>70</td>
</tr>
<tr>
<td>131.</td>
<td>Benihana:</td>
<td>$297 million</td>
<td>65</td>
</tr>
<tr>
<td>132.</td>
<td>Fogo de Chão:</td>
<td>$294 million</td>
<td>38</td>
</tr>
<tr>
<td>133.</td>
<td>Smashburger:</td>
<td>$294 million</td>
<td>322</td>
</tr>
<tr>
<td>134.</td>
<td>Black Bear Diner:</td>
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<td>120</td>
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<tr>
<td>135.</td>
<td>Rally's Hamburgers:</td>
<td>$289 million</td>
<td>300</td>
</tr>
<tr>
<td>136.</td>
<td>Caribou Coffee:</td>
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<td>394</td>
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<tr>
<td>137.</td>
<td>Cooper's Hawk Winery &amp; Restaurants:</td>
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<td>35</td>
</tr>
<tr>
<td>138.</td>
<td>Peet's Coffee &amp; Tea:</td>
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<tr>
<td>139.</td>
<td>Big Boy/Frisch's Big Boy:</td>
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</tr>
<tr>
<td>140.</td>
<td>Sarku Japan:</td>
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<td>225</td>
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<td>142.</td>
<td>Bill Miller Bar-B-Q:</td>
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<td>Seasons 52:</td>
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<td>Friendly's:</td>
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<td>148.</td>
<td>Braum's Ice Cream &amp; Dairy Stores:</td>
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<td>149.</td>
<td>Morton's The Steakhouse:</td>
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<tr>
<td>150.</td>
<td>Huddle House:</td>
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<tr>
<td>151.</td>
<td>Legal Sea Foods:</td>
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<tr>
<td>152.</td>
<td>Pret a Manger:</td>
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<td>92</td>
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<tr>
<td>153.</td>
<td>Godfather's Pizza:</td>
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<tr>
<td>154.</td>
<td>Bahama Breeze Island Grille:</td>
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<tr>
<td>Rank</td>
<td>Restaurant Name</td>
<td>Revenue</td>
<td>Customers</td>
</tr>
<tr>
<td>------</td>
<td>-----------------------------------------</td>
<td>---------</td>
<td>-----------</td>
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<tr>
<td>155</td>
<td>Sbarro:</td>
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<td>345</td>
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<tr>
<td>156</td>
<td>Cafe Rio Mexican Grill:</td>
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<td>Rubio's:</td>
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<td>158</td>
<td>Fazoli's:</td>
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<td>Mastro's Restaurants:</td>
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<td>160</td>
<td>Romano's Macaroni Grill:</td>
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<tr>
<td>161</td>
<td>Newk's Eatery:</td>
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<tr>
<td>162</td>
<td>Brio Tuscan Grille:</td>
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<tr>
<td>163</td>
<td>A&amp;W All-American Food:</td>
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<td>164</td>
<td>Which Wich:</td>
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<td>165</td>
<td>Fuzzy's Taco Shop:</td>
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<td>Uncle Julio's:</td>
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<td>Torchy's Tacos:</td>
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</tr>
<tr>
<td>168</td>
<td>Beef 'O' Brady's:</td>
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<tr>
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<td>Hard Rock Cafe:</td>
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<tr>
<td>170</td>
<td>Souplantation &amp; Sweet Tomatoes:</td>
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<td>171</td>
<td>Luby's:</td>
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<td>172</td>
<td>Sonny's BBQ:</td>
<td>$209 million</td>
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<tr>
<td>173</td>
<td>Uno Pizzeria &amp; Grill:</td>
<td>$208 million</td>
<td>95</td>
</tr>
<tr>
<td>174</td>
<td>Johnny Rockets:</td>
<td>$207 million</td>
<td>175</td>
</tr>
<tr>
<td>175</td>
<td>Penn Station East Coast Subs:</td>
<td>$200 million</td>
<td>310</td>
</tr>
<tr>
<td>176</td>
<td>Claim Jumper:</td>
<td>$197 million</td>
<td>37</td>
</tr>
<tr>
<td>177</td>
<td>Fuddruckers:</td>
<td>$196 million</td>
<td>153</td>
</tr>
<tr>
<td>178</td>
<td>Cinnabon:</td>
<td>$190 million</td>
<td>917</td>
</tr>
<tr>
<td>179</td>
<td>Buca di Beppo:</td>
<td>$189 million</td>
<td>77</td>
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<tr>
<td>180</td>
<td>Shoney's:</td>
<td>$188 million</td>
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</tr>
<tr>
<td>181</td>
<td>Bubba Gump Shrimp Co.:</td>
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<td>182</td>
<td>Del Frisco's Double Eagle Steak House:</td>
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<td>183</td>
<td>Houlihan's:</td>
<td>$181 million</td>
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</tr>
<tr>
<td>184</td>
<td>J. Alexander's:</td>
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<td>32</td>
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<tr>
<td>185</td>
<td>Mimi's Cafe:</td>
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<td>79</td>
</tr>
<tr>
<td>186</td>
<td>Joe's Crab Shack:</td>
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<td>57</td>
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<tr>
<td>187</td>
<td>McCormick &amp; Schmick's:</td>
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<td>41</td>
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<tr>
<td>188</td>
<td>Firebirds Wood Fired Grill:</td>
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<td>48</td>
</tr>
<tr>
<td>189</td>
<td>Donatos Pizza:</td>
<td>$176 million</td>
<td>170</td>
</tr>
<tr>
<td>190</td>
<td>Lazy Dog Restaurant &amp; Bar:</td>
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<td>30</td>
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<tr>
<td>191</td>
<td>Old Country Buffet/HomeTown Buffet:</td>
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<td>65</td>
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<tr>
<td>192</td>
<td>Pappasito's Cantina:</td>
<td>$175 million</td>
<td>25</td>
</tr>
<tr>
<td>193</td>
<td>The Melting Pot:</td>
<td>$173 million</td>
<td>108</td>
</tr>
<tr>
<td>194</td>
<td>Le Pain Quotidien:</td>
<td>$172 million</td>
<td>98</td>
</tr>
<tr>
<td>195</td>
<td>Islands Fine Burgers &amp; Drinks:</td>
<td>$171 million</td>
<td>56</td>
</tr>
<tr>
<td>196</td>
<td>Golden Chick:</td>
<td>$171 million</td>
<td>183</td>
</tr>
<tr>
<td>197</td>
<td>Great Harvest Bread Co.:</td>
<td>$170 million</td>
<td>183</td>
</tr>
<tr>
<td>198</td>
<td>La Madeleine Country French Cafe:</td>
<td>$170 million</td>
<td>87</td>
</tr>
</tbody>
</table>

*RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2020-2021*  
• 235 •
<table>
<thead>
<tr>
<th>Rank</th>
<th>Restaurant Name</th>
<th>Revenue</th>
<th>Sales Channel</th>
</tr>
</thead>
<tbody>
<tr>
<td>199.</td>
<td>Smokey Bones Bar &amp; Fire Grill:</td>
<td>$170 million</td>
<td>63</td>
</tr>
<tr>
<td>200.</td>
<td>Taco Bueno:</td>
<td>$170 million</td>
<td>169</td>
</tr>
<tr>
<td>201.</td>
<td>Wetzel's Pretzels:</td>
<td>$170 million</td>
<td>335</td>
</tr>
<tr>
<td>202.</td>
<td>The Original Pancake House:</td>
<td>$168 million</td>
<td>132</td>
</tr>
<tr>
<td>203.</td>
<td>True Food Kitchen:</td>
<td>$167 million</td>
<td>25</td>
</tr>
<tr>
<td>204.</td>
<td>Jack's:</td>
<td>$163 million</td>
<td>160</td>
</tr>
<tr>
<td>205.</td>
<td>Mountain Mike's Pizza:</td>
<td>$163 million</td>
<td>204</td>
</tr>
<tr>
<td>206.</td>
<td>Eat'n Park:</td>
<td>$162 million</td>
<td>68</td>
</tr>
<tr>
<td>207.</td>
<td>Kona Grill:</td>
<td>$162 million</td>
<td>44</td>
</tr>
<tr>
<td>208.</td>
<td>Lucille's Smokehouse Bar-B-Que:</td>
<td>$162 million</td>
<td>24</td>
</tr>
<tr>
<td>209.</td>
<td>The Coffee Bean &amp; Tea Leaf:</td>
<td>$162 million</td>
<td>315</td>
</tr>
<tr>
<td>210.</td>
<td>Sweetgreen:</td>
<td>$158 million</td>
<td>92</td>
</tr>
<tr>
<td>211.</td>
<td>LaRosa's Pizzeria:</td>
<td>$158 million</td>
<td>64</td>
</tr>
<tr>
<td>212.</td>
<td>Menchie's Frozen Yogurt:</td>
<td>$157 million</td>
<td>440</td>
</tr>
<tr>
<td>213.</td>
<td>Anthony's Coal Fired Pizza:</td>
<td>$154 million</td>
<td>215</td>
</tr>
<tr>
<td>214.</td>
<td>Bruegger's Bagels:</td>
<td>$154 million</td>
<td>67</td>
</tr>
<tr>
<td>215.</td>
<td>Farmer Boys:</td>
<td>$152 million</td>
<td>92</td>
</tr>
<tr>
<td>216.</td>
<td>Roosters:</td>
<td>$152 million</td>
<td>41</td>
</tr>
<tr>
<td>217.</td>
<td>Hurricane Grill &amp; Wings:</td>
<td>$150 million</td>
<td>56</td>
</tr>
<tr>
<td>218.</td>
<td>Giordano's:</td>
<td>$148 million</td>
<td>71</td>
</tr>
<tr>
<td>219.</td>
<td>The Old Spaghetti Factory:</td>
<td>$147 million</td>
<td>42</td>
</tr>
<tr>
<td>220.</td>
<td>Grand Lux Cafe:</td>
<td>$146 million</td>
<td>14</td>
</tr>
<tr>
<td>221.</td>
<td>Wayback Burgers:</td>
<td>$145 million</td>
<td>149</td>
</tr>
<tr>
<td>222.</td>
<td>Rainforest Cafe:</td>
<td>$144 million</td>
<td>19</td>
</tr>
<tr>
<td>223.</td>
<td>PDQ:</td>
<td>$143 million</td>
<td>67</td>
</tr>
<tr>
<td>224.</td>
<td>Pizza Pro:</td>
<td>$142 million</td>
<td>468</td>
</tr>
<tr>
<td>225.</td>
<td>Duffy's Sports Grill:</td>
<td>$141 million</td>
<td>34</td>
</tr>
<tr>
<td>226.</td>
<td>Pollo Campero:</td>
<td>$141 million</td>
<td>80</td>
</tr>
<tr>
<td>227.</td>
<td>Tijuana Flats:</td>
<td>$141 million</td>
<td>135</td>
</tr>
<tr>
<td>228.</td>
<td>Black Angus Steakhouse:</td>
<td>$140 million</td>
<td>43</td>
</tr>
<tr>
<td>229.</td>
<td>Quiznos:</td>
<td>$139 million</td>
<td>323</td>
</tr>
<tr>
<td>230.</td>
<td>Shari's Cafe and Pies:</td>
<td>$139 million</td>
<td>92</td>
</tr>
<tr>
<td>231.</td>
<td>Rosati's Pizza:</td>
<td>$138 million</td>
<td>210</td>
</tr>
<tr>
<td>232.</td>
<td>Biggby Coffee:</td>
<td>$138 million</td>
<td>265</td>
</tr>
<tr>
<td>233.</td>
<td>Bertucci's:</td>
<td>$137 million</td>
<td>58</td>
</tr>
<tr>
<td>234.</td>
<td>Yogurtland:</td>
<td>$136 million</td>
<td>273</td>
</tr>
<tr>
<td>235.</td>
<td>BurgerFi:</td>
<td>$134 million</td>
<td>104</td>
</tr>
<tr>
<td>236.</td>
<td>Lee's Famous Recipe Chicken:</td>
<td>$134 million</td>
<td>130</td>
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<tr>
<td>237.</td>
<td>Eddie V's Prime Seafood:</td>
<td>$133 million</td>
<td>19</td>
</tr>
<tr>
<td>238.</td>
<td>Bravo! Cucina Italiana:</td>
<td>$131 million</td>
<td>45</td>
</tr>
<tr>
<td>239.</td>
<td>Great American Cookies:</td>
<td>$131 million</td>
<td>352</td>
</tr>
<tr>
<td>240.</td>
<td>Baja Fresh Mexican Grill:</td>
<td>$130 million</td>
<td>135</td>
</tr>
<tr>
<td>241.</td>
<td>Slim Chickens:</td>
<td>$129 million</td>
<td>75</td>
</tr>
<tr>
<td>242.</td>
<td>The Brass Tap:</td>
<td>$128 million</td>
<td>48</td>
</tr>
<tr>
<td>Restaurant Name</td>
<td>Revenue</td>
<td>Rank</td>
<td></td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>----------</td>
<td>------</td>
<td></td>
</tr>
<tr>
<td>STK</td>
<td>$127 million</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>WaBa Grill</td>
<td>$127 million</td>
<td>191</td>
<td></td>
</tr>
<tr>
<td>54th Street Restaurant &amp; Drafthouse</td>
<td>$125 million</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>Metro Diner</td>
<td>$125 million</td>
<td>67</td>
<td></td>
</tr>
<tr>
<td>Costa Vida Fresh Mexican Grill</td>
<td>$123 million</td>
<td>91</td>
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</tr>
<tr>
<td>Freebirds World Burrito</td>
<td>$123 million</td>
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<td></td>
</tr>
<tr>
<td>L&amp;L Hawaiian Barbecue</td>
<td>$123 million</td>
<td>188</td>
<td></td>
</tr>
<tr>
<td>Togo's Sandwiches</td>
<td>$123 million</td>
<td>205</td>
<td></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](http://www.restaurantbusinessonline.com)

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

49.1 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.

49.2 Top Chains In Sales Growth
Among the largest 250 restaurant chains, the following reported the highest growth (source: Restaurant Business, June 2019):

<table>
<thead>
<tr>
<th>Sales Growth</th>
<th>Total Sales</th>
<th>Overall Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metro Diner:</td>
<td>71.2%</td>
<td>$125 million</td>
</tr>
<tr>
<td>MOD Pizza:</td>
<td>44.8%</td>
<td>$397 million</td>
</tr>
<tr>
<td>First Watch:</td>
<td>31.9%</td>
<td>$413 million</td>
</tr>
<tr>
<td>Shake Shack:</td>
<td>28.0%</td>
<td>$459 million</td>
</tr>
<tr>
<td>Lazy Dog Restaurant:</td>
<td>26.8%</td>
<td>$413 million</td>
</tr>
<tr>
<td>Sweetgreen:</td>
<td>23.8%</td>
<td>$158 million</td>
</tr>
<tr>
<td>Habit Burger Grill:</td>
<td>23.1%</td>
<td>$436 million</td>
</tr>
<tr>
<td>Raising Cane's Chicken Fingers:</td>
<td>22.5%</td>
<td>$1.18 billion</td>
</tr>
<tr>
<td>True Food Kitchen:</td>
<td>22.3%</td>
<td>$167 million</td>
</tr>
<tr>
<td>Blaze Pizza:</td>
<td>20.3%</td>
<td>$326 million</td>
</tr>
<tr>
<td>Tropical Smoothie:</td>
<td>20.3%</td>
<td>$472 million</td>
</tr>
</tbody>
</table>

Among chains ranking #251 thru #500 in total sales, the following reported the highest growth in 2018:

<table>
<thead>
<tr>
<th>Sales Growth</th>
<th>Total Sales</th>
<th>Overall Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>CoreLife Eatery:</td>
<td>133.8%</td>
<td>$52 million</td>
</tr>
<tr>
<td>110 Grill:</td>
<td>77.3%</td>
<td>$49 million</td>
</tr>
<tr>
<td>Cava Grill:</td>
<td>67.9%</td>
<td>$85 million</td>
</tr>
<tr>
<td>Halal Guys:</td>
<td>63.7%</td>
<td>$58 million</td>
</tr>
<tr>
<td>Walk-On’s Bistro:</td>
<td>56.6%</td>
<td>$102 million</td>
</tr>
<tr>
<td>Poke Bar:</td>
<td>47.5%</td>
<td>$53 million</td>
</tr>
<tr>
<td>Chicken Salad Chick:</td>
<td>43.8%</td>
<td>$109 million</td>
</tr>
<tr>
<td>Nekter Juice Bar:</td>
<td>42.9%</td>
<td>$70 million</td>
</tr>
<tr>
<td>Vitality Bowls:</td>
<td>42.4%</td>
<td>$50 million</td>
</tr>
<tr>
<td>Mission BBQ:</td>
<td>40.0%</td>
<td>$113 million</td>
</tr>
</tbody>
</table>
### 49.3 Sales Declines

Among the largest 250 restaurant chains, the following reported the highest sales decline in 2018:

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Sales Growth</th>
<th>Total Sales (Million)</th>
<th>Overall Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joe's Crab Shack</td>
<td>-34.5%</td>
<td>180</td>
<td>186</td>
</tr>
<tr>
<td>Quiznos</td>
<td>-18.4%</td>
<td>139</td>
<td>229</td>
</tr>
<tr>
<td>Bertucci's</td>
<td>-17.5%</td>
<td>137</td>
<td>233</td>
</tr>
<tr>
<td>Old Country Buffet/HomeTown Buffet</td>
<td>-15.0%</td>
<td>175</td>
<td>191</td>
</tr>
<tr>
<td>McCormick &amp; Schmick's</td>
<td>-13.6%</td>
<td>179</td>
<td>187</td>
</tr>
</tbody>
</table>

Among chains ranking #251 thru #500 in total sales, the following reported the highest sales decline in 2018:

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Sales Growth</th>
<th>Total Sales (Million)</th>
<th>Overall Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tilted Kilt Pub &amp; Grill</td>
<td>-37.8%</td>
<td>89</td>
<td>323</td>
</tr>
<tr>
<td>Ryan's</td>
<td>-33.3%</td>
<td>56</td>
<td>462</td>
</tr>
<tr>
<td>Max &amp; Emma's</td>
<td>-30.9%</td>
<td>60</td>
<td>434</td>
</tr>
<tr>
<td>The Egg &amp; I Breakfast &amp; Lunch</td>
<td>-29.2%</td>
<td>62</td>
<td>421</td>
</tr>
<tr>
<td>Papa Gino's Pizza</td>
<td>-21.1%</td>
<td>98</td>
<td>304</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](http://www.restaurantbusinessonline.com))

Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606.  
(312) 876-0004.  ([www.technomic.com](http://www.technomic.com))
TOP CHAINS BY TYPE OF MENU

50.1 Overview
The annual assessment of the Top 250 restaurants chains by Technomic (www.technomic.com), published annually by Restaurant Business in the June issue, categorizes restaurants by type of menu as follows:
• Asian (full service)
• Asian/Noodle (limited service)
• Bakery Cafe
• Burger
• Chicken
• Coffee Cafe
• Family Casual
• Family Style
• Frozen Desserts
• Italian/Pizza (full service)
• Mexican
• Pizza (limited service)
• Sandwich
• Seafood
• Specialty Limited Service
• Sports Bar
• Steak
• Varied Menu

50.2 Largest Chains
The following are the largest restaurant chains by type of menu (source: Restaurant Business, June 2019):

Asian (full service)
• P.F. Chang's: $ 877 million
• Benihana: $ 297 million
• Kona Grill: $ 162 million

Asian/Noodle (limited service)
• Panda Express: $ 3.52 billion
• Noodles & Co.: $ 525 million
<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pei Wei Asian Diner</td>
<td>$306 million</td>
</tr>
<tr>
<td>Sarku Japan</td>
<td>$274 million</td>
</tr>
<tr>
<td>WaBa Grill</td>
<td>$127 million</td>
</tr>
</tbody>
</table>

**Bakery Cafe**

<table>
<thead>
<tr>
<th>Bakery Cafe</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Panera Bread</td>
<td>$5.76 billion</td>
</tr>
<tr>
<td>Einstein Bros. Bagels</td>
<td>$516 million</td>
</tr>
<tr>
<td>Corner Bakery Cafe</td>
<td>$362 million</td>
</tr>
<tr>
<td>Au Bon Pain</td>
<td>$339 million</td>
</tr>
<tr>
<td>Pret a Manger</td>
<td>$240 million</td>
</tr>
<tr>
<td>Le Pain Quotidien</td>
<td>$172 million</td>
</tr>
<tr>
<td>La Madeleine Country French Cafe</td>
<td>$170 million</td>
</tr>
<tr>
<td>Great Harvest Bread Co.</td>
<td>$170 million</td>
</tr>
<tr>
<td>Bruegger's Bagels</td>
<td>$154 million</td>
</tr>
</tbody>
</table>

**Burger**

<table>
<thead>
<tr>
<th>Burger</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>McDonald's</td>
<td>$38.52 billion</td>
</tr>
<tr>
<td>Burger King</td>
<td>$9.93 billion</td>
</tr>
<tr>
<td>Wendy's</td>
<td>$9.40 billion</td>
</tr>
<tr>
<td>Sonic Drive-In</td>
<td>$4.44 billion</td>
</tr>
<tr>
<td>Jack in the Box</td>
<td>$3.46 billion</td>
</tr>
<tr>
<td>Whataburger</td>
<td>$2.41 billion</td>
</tr>
<tr>
<td>Hardee's</td>
<td>$2.12 billion</td>
</tr>
<tr>
<td>Five Guys Burgers and Fries</td>
<td>$1.61 billion</td>
</tr>
<tr>
<td>Culver's</td>
<td>$1.57 billion</td>
</tr>
<tr>
<td>Carl's Jr.</td>
<td>$1.41 billion</td>
</tr>
<tr>
<td>Steak 'n Shake</td>
<td>$1.03 billion</td>
</tr>
<tr>
<td>In-N-Out Burger</td>
<td>$926 million</td>
</tr>
<tr>
<td>Checkers Drive-In Restaurants</td>
<td>$560 million</td>
</tr>
<tr>
<td>White Castle</td>
<td>$556 million</td>
</tr>
<tr>
<td>Freddy's Frozen Custard &amp; Steakburgers</td>
<td>$474 million</td>
</tr>
<tr>
<td>Shake Shack</td>
<td>$459 million</td>
</tr>
<tr>
<td>The Habit Burger Grill</td>
<td>$436 million</td>
</tr>
<tr>
<td>Krystal Company</td>
<td>$377 million</td>
</tr>
<tr>
<td>Smashburger</td>
<td>$294 million</td>
</tr>
<tr>
<td>Rally's Hamburgers</td>
<td>$289 million</td>
</tr>
<tr>
<td>A&amp;W All-American Food</td>
<td>$223 million</td>
</tr>
<tr>
<td>Fuddruckers</td>
<td>$197 million</td>
</tr>
<tr>
<td>Jack's</td>
<td>$163 million</td>
</tr>
<tr>
<td>Farmer Boys</td>
<td>$152 million</td>
</tr>
<tr>
<td>Wayback Burgers</td>
<td>$144 million</td>
</tr>
<tr>
<td>BurgerFi</td>
<td>$134 million</td>
</tr>
</tbody>
</table>
Chicken
• Chick-fil-A: $10.18 billion
• KFC: $ 4.43 million
• Popeyes Louisiana Kitchen: $ 3.22 billion
• Zaxby's: $ 1.84 billion
• Bojangles': $ 1.29 billion
• Wingstop: $ 1.20 billion
• Raising Cane's Chicken Fingers: $ 1.18 billion
• El Pollo Loco: $ 868 million
• Church's Chicken: $ 747 million
• Boston Market: $ 557 million
• Pollo Tropical: $ 379 million
• Golden Chick: $ 171 million
• PDQ: $ 142 million
• Pollo Campero: $ 141 million
• Lee's Famous Recipe Chicken: $ 134 million
• Slim Chickens: $ 129 million

Coffee Cafe
• Starbucks: $19.66 billion
• Dunkin': $ 8.78 billion
• Tim Hortons: $ 750 million
• Dutch Bros. Coffee: $ 494 million
• Caribou Coffee: $ 286 million
• Peet's Coffee & Tea: $ 282 million
• The Coffee Bean & Tea Leaf: $ 162 million
• Biggby Coffee: $ 138 million

Family Casual
• Golden Corral: $ 1.73 billion
• Sizzler: $ 266 million
• Souplantation & Sweet Tomatoes: $ 211 million
• Luby's: $ 210 million
• Old Country Buffet/HomeTown Buffet: $ 175 million

Family Style
• IHOP: $ 3.23 billion
• Denny's: $ 2.66 billion
• Cracker Barrel: $ 2.43 billion
• Waffle House: $ 1.30 billion
• Bob Evans: $ 838 million
• Perkins Restaurant & Bakery: $ 603 million
• First Watch: $ 413 million
• Village Inn: $ 347 million
- Black Bear Diner: $291 million
- Big Boy/Frisch's Big Boy: $275 million
- Friendly's: $248 million
- Huddle House: $245 million
- Shoney's: $187 million
- The Original Pancake House: $168 million
- Eat'n Park: $162 million
- Shari's Cafe and Pies: $139 million
- Metro Diner: $125 million

### Frozen Desserts

- Dairy Queen: $3.65 billion
- Baskin-Robbins: $611 million
- Cold Stone Creamery: $374 million
- Braum's Ice Cream & Dairy Stores: $246 million
- Menchie's Frozen Yogurt: $157 million
- Yogurtland: $136 million

### Italian/Pizza (full service)

- Olive Garden: $4.08 billion
- Carrabba's Italian Grill: $659 million
- California Pizza Kitchen: $639 million
- Mellow Mushroom: $425 million
- Maggiano's Little Italy: $413 million
- Romano's Macaroni Grill: $229 million
- Brio Tuscan Grille: $226 million
- Uno Pizzeria & Grill: $208 million
- Buca di Beppo: $189 million
- LaRosa's Pizzeria: $158 million
- Anthony's Coal Fired Pizza: $154 million
- Giordano's: $148 million
- The Old Spaghetti Factory: $147 million
- Bertucci's: $137 million
- Bravo! Cucina Italiana: $131 million

### Mexican

- Taco Bell: $10.36 billion
- Chipotle Mexican Grill: $4.80 billion
- Qdoba Mexican Eats: $835 million
- Del Taco: $817 million
- Moe's Southwest Grill: $739 million
- Chuy's: $398 million
- Taco John's: $371 million
- On The Border Mexican Grill & Cantina: $348 million
<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taco Cabana:</td>
<td>$324 million</td>
</tr>
<tr>
<td>Cafe Rio Mexican Grill:</td>
<td>$236 million</td>
</tr>
<tr>
<td>Rubio's:</td>
<td>$232 million</td>
</tr>
<tr>
<td>Fuzzy's Taco Shop:</td>
<td>$214 million</td>
</tr>
<tr>
<td>Uncle Julio's:</td>
<td>$214 million</td>
</tr>
<tr>
<td>Torchy's Tacos:</td>
<td>$213 million</td>
</tr>
<tr>
<td>Pappasito's Cantina:</td>
<td>$175 million</td>
</tr>
<tr>
<td>Taco Bueno:</td>
<td>$170 million</td>
</tr>
<tr>
<td>Tijuana Flats:</td>
<td>$141 million</td>
</tr>
<tr>
<td>Baja Fresh Mexican Grill:</td>
<td>$130 million</td>
</tr>
<tr>
<td>Costa Vida Fresh Mexican Grill:</td>
<td>$123 million</td>
</tr>
<tr>
<td>Freebirds World Burrito:</td>
<td>$123 million</td>
</tr>
</tbody>
</table>

Pizza (limited service)

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domino's:</td>
<td>$6.59 billion</td>
</tr>
<tr>
<td>Pizza Hut:</td>
<td>$5.52 billion</td>
</tr>
<tr>
<td>Little Caesars:</td>
<td>$3.82 billion</td>
</tr>
<tr>
<td>Papa John's:</td>
<td>$2.71 billion</td>
</tr>
<tr>
<td>Papa Murphy's Pizza:</td>
<td>$795 million</td>
</tr>
<tr>
<td>Marco's Pizza:</td>
<td>$599 million</td>
</tr>
<tr>
<td>Round Table Pizza:</td>
<td>$436 million</td>
</tr>
<tr>
<td>Hungry Howie's Pizza:</td>
<td>$410 million</td>
</tr>
<tr>
<td>MOD Pizza:</td>
<td>$397 million</td>
</tr>
<tr>
<td>Chuck E. Cheese's:</td>
<td>$383 million</td>
</tr>
<tr>
<td>Jet's Pizza:</td>
<td>$356 million</td>
</tr>
<tr>
<td>Cicis:</td>
<td>$350 million</td>
</tr>
<tr>
<td>Blaze Pizza:</td>
<td>$326 million</td>
</tr>
<tr>
<td>Pizza Ranch:</td>
<td>$249 million</td>
</tr>
<tr>
<td>Godfather's Pizza:</td>
<td>$240 million</td>
</tr>
<tr>
<td>Sbarro:</td>
<td>$236 million</td>
</tr>
<tr>
<td>Donatos Pizza:</td>
<td>$176 million</td>
</tr>
<tr>
<td>Mountain Mike's Pizza:</td>
<td>$163 million</td>
</tr>
<tr>
<td>Pizza Pro:</td>
<td>$142 million</td>
</tr>
<tr>
<td>Rosati’s Pizza:</td>
<td>$138 million</td>
</tr>
</tbody>
</table>

Sandwich

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subway:</td>
<td>$10.41 billion</td>
</tr>
<tr>
<td>Arby's:</td>
<td>$3.88 billion</td>
</tr>
<tr>
<td>Jimmy John's Gourmet Sandwiches:</td>
<td>$2.16 billion</td>
</tr>
<tr>
<td>Jersey Mike's Subs:</td>
<td>$1.14 billion</td>
</tr>
<tr>
<td>Firehouse Subs:</td>
<td>$794 million</td>
</tr>
<tr>
<td>Jason's Deli:</td>
<td>$721 million</td>
</tr>
<tr>
<td>McAlister's Deli:</td>
<td>$704 million</td>
</tr>
<tr>
<td>Potbelly Sandwich Shop:</td>
<td>$452 million</td>
</tr>
<tr>
<td>Restaurant</td>
<td>Revenue</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Charleys Philly Steaks:</td>
<td>$400 million</td>
</tr>
<tr>
<td>Portillo's:</td>
<td>$381 million</td>
</tr>
<tr>
<td>Zoës Kitchen:</td>
<td>$372 million</td>
</tr>
<tr>
<td>Schlotzsky's:</td>
<td>$351 million</td>
</tr>
<tr>
<td>Wienerschnitzel:</td>
<td>$256 million</td>
</tr>
<tr>
<td>Newk's Eatery:</td>
<td>$226 million</td>
</tr>
<tr>
<td>Which Wich:</td>
<td>$222 million</td>
</tr>
<tr>
<td>Penn Station East Coast Subs:</td>
<td>$200 million</td>
</tr>
<tr>
<td>Quiznos:</td>
<td>$139 million</td>
</tr>
<tr>
<td>Togo's Sandwiches:</td>
<td>$123 million</td>
</tr>
</tbody>
</table>

**Seafood**

- Red Lobster: $2.40 billion
- Bonefish Grill: $592 million
- Pappadeaux Seafood Kitchen: $365 million
- Legal Sea Foods: $240 million
- Bubba Gump Shrimp Co.: $187 million
- Joe's Crab Shack: $180 million
- McCormick & Schmick's: $179 million
- Eddie V's Prime Seafood: $133 million

**Specialty (limited service)**

- Krispy Kreme: $805 million
- Auntie Anne's: $558 million
- Captain D's Seafood Kitchen: $556 million
- Jamba Juice: $491 million
- Tropical Smoothie Cafe: $472 million
- Long John Silver's: $440 million
- Smoothie King: $415 million
- Dickey's Barbecue Pit: $401 million
- Fazoli's: $231 million
- Cinnabon: $190 million
- Wetzel's Pretzels: $170 million
- Sweetgreen: $158 million
- Great American Cookies: $131 million
- L&L Hawaiian Barbecue: $123 million

**Sports Bar**

- Buffalo Wild Wings: $3.79 billion
- Hooters: $798 million
- Dave & Buster's: $539 million
- Miller's Ale House: $415 million
- Twin Peaks: $343 million
- Beef 'O' Brady's: $212 million
• Hurricane Grill & Wings: $150 million
• Duffy's Sports Grill: $141 million
• The Brass Tap: $128 million

Steak
• Texas Roadhouse: $2.72 billion
• Outback Steakhouse: $2.61 billion
• LongHorn Steakhouse: $1.75 billion
• Ruth's Chris Steak House: $748 million
• Logan's Roadhouse: $520 million
• The Capital Grille: $440 million
• Saltgrass Steak House: $349 million
• Texas de Brazil Churrascaria: $334 million
• Fleming's Prime Steakhouse & Wine Bar: $304 million
• Fogo de Chão: $294 million
• Morton's The Steakhouse: $246 million
• Mastro's Restaurants: $230 million
• Del Frisco's Double Eagle Steak House: $182 million
• Black Angus Steakhouse: $140 million
• STK: $127 million

Varied Menu (full service)
• Applebee's: $4.21 billion
• Chili's Grill & Bar: $3.50 billion
• The Cheesecake Factory: $2.12 billion
• Red Robin Gourmet Burgers and Brews: $1.50 billion
• TGI Fridays: $1.18 billion
• BJ's Restaurant & Brewhouse: $1.11 billion
• Cheddar's Scratch Kitchen: $728 million
• Ruby Tuesday: $721 million
• Yard House: $571 million
• O'Charley's: $463 million
• Bar Louie: $309 million
• Ninety Nine Restaurants: $305 million
• Cooper's Hawk Winery & Restaurants: $282 million
• Old Chicago Pizza & Taproom: $256 million
• Seasons 52: $249 million
• Bahama Breeze Island Grille: $239 million
• Hard Rock Cafe: $211 million
• Johnny Rockets: $207 million
• Claim Jumper: $197 million
• Houlihan's: $181 million
• J. Alexander's: $181 million
• Mimi's Cafe: $181 million
• Firebirds Wood Fired Grill: $179 million
• Lazy Dog Restaurant & Bar: $175 million
• The Melting Pot: $173 million
• Islands Fine Burgers & Drinks: $171 million
• True Food Kitchen: $167 million
• Roosters: $152 million
• Grand Lux Cafe: $146 million
• Rainforest Cafe: $144 million
• 54th Street Restaurant & Drafthouse: $125 million

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)
TOP CONTRACT MANAGEMENT COMPANIES

51.1 Overview

Food Management annually ranks the largest contract management companies based on annual revenue. This chapter presents the 2019 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: $18.6 billion
- Aramark Corp.: $10.1 billion
- Sodexo Inc.: $9.6 billion
- Delaware North Companies: $3.4 billion
- Elior North America: $1.4 billion
- Healthcare Services Group Inc.: $1.0 billion
- AVI Foodsystems Inc.: $765 million
- Legends Hospitality: $750 million
- Thompson Hospitality: $690 million
- Guest Services Inc.: $468 million
- Spectra Food Services and Hospitality: $408 million
- Guckenheimer/ISS: $400 million
- Metz Culinary Management: $385 million
- Southwest Foodservice Excellence: $350 million
- Thomas Cuisine Management: $245 million
- Parkhurst Dining: $225 million
- Gourmet Services Inc.: $220 million
- Whitsons Culinary Group: $172 million
- American Dining Creations: $168 million
- Nutrition Group: $167 million
- Taher Inc.: $141 million
- Continental Services: $134 million
- HHS Culinary & Nutrition Solutions: $129 million
- Creative Dining Services: $125 million
- Lessing's Food Service Management: $120 million
- Company Kitchen: $116 million
- Southern Foodservice: $95 million
- ABM Healthcare Support Services: $90 million
- Pomptonian Food Service: $88 million
- MMI Dining Systems: $79 million
- Cafe Services Inc.: $65 million
- LPM Affiliated Companies dba Epicurean Feast: $61 million
- Quest Food Management: $61 million
- Epicurean Group: $58 million
- Food Management Group Inc.: $56 million
- Mazzone Hospitality/PRIME Business Dining: $55 million
- Sterling Spoon Culinary Management: $52 million
- Fresh Ideas Food Service Management: $41 million
- Global Connections to Employment (GCE): $41 million
- Food For Thought Enterprises Inc.: $38 million
- Better4You Meals: $37 million
- Luby's Culinary Services: $37 million
- NexDine: $37 million
- Prince Food Systems Inc.: $37 million
- Brock & Co. Inc.: $36 million
- Culinary Services Group: $32 million
- SLA Management: $31 million
- Lintons Managed Services: $28 million
- Lunchtime Solutions Inc.: $25 million
- Plum Market Food Service: $13 million
52

TOP FOODSERVICE DISTRIBUTORS

52.1 Ranking By Annual Sales

There are an estimated 16,500 foodservice distribution companies in the U.S. Combined annual revenues are $268 billion. The top eight foodservice distributors account for 41% of the market.

The largest foodservice distributors, ranked by annual sales, are as follows (sources: Applico [www.applico.com] and Technomic [www.technomic.com], based on corporate filings):

- Sysco Corp.: $50.4 billion
- US Foodservice: $23.0 billion
- Performance Food Group: $16.1 billion
- Gordon Food Service: $12.0 billion
- Ben E. Keith Company: $7.8 billion
- Maines Paper & Food Service: $3.4 billion
- Shamrock Foods Co.: $2.8 billion

Two other major players in the industry are Food Services of America (a part of Services Group of America) and Reinhart (a part of Reyes Holding). Both are part of larger corporations who do not publish division specific revenue data.

Ten percent (10%) of the foodservice distribution market is captured by wholesale membership clubs (e.g., Costco and Sam’s Club).

52.2 Market Resources

Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)
53.1 Ranking By Revenue
Annually, *Franchise Times* ranks restaurant franchisees by revenue. The following is the 2018 ranking:

- Flynn Restaurant Group (San Francisco, CA): $1.86 billion
- NPC International (Overland Park, KS): $1.33 billion
- Dhanani Group (Sugar Land, TX): $1.25 billion
- Carrols Restaurant Group (Syracuse, NY): $1.09 billion
- MUY! Companies (San Antonio, TX): $938 million
- Manna (Louisville, KY): $856 million
- Summit Restaurant Group (Richardson, TX): $820 million
- Sun Holdings (Dallas, TX): $725 million
- KBP Foods (Overland Park, KS): $720 million
- Covelli Enterprises (Warren, OH): $680 million
- Pacific Bells (Vancouver, WA): $584 million
- Yadav Enterprises (Fremont, CA): $575 million
- GPS Hospitality (Atlanta, GA): $541 million
- The Briad Group (Livingston, NJ): $472 million
- Doherty Enterprises (Allendale, NJ): $455 million
- K-Mac Enterprises (Fort Smith, AR): $453 million
- Tacala (Birmingham, AL): $431 million
- Boddie-Noell Enterprises (Rocky Mount, NC): $429 million
- Ampex Brands (Dallas, TX): $427 million
- Sizzling Platter (Murray, UT): $382 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 2019:

<table>
<thead>
<tr>
<th>Company</th>
<th>Units</th>
<th>Brands</th>
</tr>
</thead>
<tbody>
<tr>
<td>NPC International:</td>
<td>1,599</td>
<td>Pizza Hut, Wendy's</td>
</tr>
<tr>
<td>Flynn Restaurant Group:</td>
<td>1,246</td>
<td>Applebee's, Arby's, Taco Bell, Panera Bread</td>
</tr>
<tr>
<td>Target:</td>
<td>1,066</td>
<td>Pizza Hut</td>
</tr>
<tr>
<td>Company</td>
<td>Number of Restaurants</td>
<td></td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------</td>
<td></td>
</tr>
<tr>
<td>Sun Holdings</td>
<td>995 Burger King, Popeyes Louisiana Kitchen, Taco Bueno, Arby's, Cicis, Golden Corral, Krispy Kreme</td>
<td></td>
</tr>
<tr>
<td>Carrolls Group</td>
<td>849 Burger King</td>
<td></td>
</tr>
<tr>
<td>Dhanani Group</td>
<td>811 Burger King, Popeyes Louisiana Kitchen, La Madeleine</td>
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<tr>
<td>KBP Foods</td>
<td>777 KFC, Taco Bell</td>
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<tr>
<td>MUY! Brands</td>
<td>762 Pizza Hut, Wendy's, Taco Bell</td>
<td></td>
</tr>
<tr>
<td>Aramark</td>
<td>601 Chick-fil-A, Einstein Bros. Bagels, Subway, Panda Express, Papa John's, Pizza Hut, Which Wich, Moe's Southwest Grill, Jamba Juice, Freshii, Taco Bell, Steak 'N Shake, Qdoba Mexican Eats, Quiznos, Tim Hortons, Chili's, Mooyah, Erbert and Gerbert's Sandwich Shop, Mcalister's Deli, Quaker Steak &amp; Lube, Wahoo's Fish Taco, Wendy's, Denny's, KFC, the Extreme Pita, Au Bon Pain, Burgerfi, Caribou Coffee, IHOP, Pinkberry, PJ's Coffee of New Orleans, Wingstop, the Coffee Bean &amp; Tea Leaf, Dunkin', Nathan's Famous, La Madeleine</td>
<td></td>
</tr>
<tr>
<td>Pilot Travel Centers</td>
<td>591 Subway, Cinnabon, Wendy's, Arby's, Dunkin', DQ Treat, Taco Bell, Moe's Southwest Grill, Pizza Hut, Hot Stuff Pizza, KFC, Carvel, Chester's, IHOP</td>
<td></td>
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<tr>
<td>Army &amp; Air Force Exchange Services</td>
<td>493 Subway, Burger King, Charleys Philly Steaks, Popeyes Louisiana Kitchen, Taco Bell, Arby's, Einstein Bros. Bagels, Wing Zone, Pizza Hut, Blimpie, Taco John's, Church's Chicken, Domino's Pizza</td>
<td></td>
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<tr>
<td>James Humphrey</td>
<td>469 Dunkin' Donuts</td>
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<tr>
<td>Love's Travel Stops</td>
<td>428 Subway, Chester's, Godfather's Pizza, Hardee's, IHOP, Arby's, Taco John's, DQ Treat</td>
<td></td>
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<tr>
<td>&amp; Country Stores</td>
<td></td>
<td></td>
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<tr>
<td>GPS Hospitality</td>
<td>408 Burger King, Popeyes Louisiana Kitchen</td>
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<tr>
<td>Harman Management</td>
<td>397 KFC, A&amp;W, Long John Silver's, Pizza Hut</td>
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<tr>
<td>Rottinghaus</td>
<td>393 Subway</td>
<td></td>
</tr>
<tr>
<td>Company</td>
<td>Restaurants</td>
<td></td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Ampex Brands</td>
<td>KFC, Pizza Hut, Long John Silver’s, Tim Hortons, Taco Bell</td>
<td></td>
</tr>
<tr>
<td>Summit Restaurant Group:</td>
<td>IHOP, Applebee’s</td>
<td></td>
</tr>
<tr>
<td>Heartland Automotive Service:</td>
<td>Jiffy Lube</td>
<td></td>
</tr>
<tr>
<td>JIB Management:</td>
<td>Jack in the Box, Denny’s, TGI Fridays, Sizzler</td>
<td></td>
</tr>
<tr>
<td>Tacala:</td>
<td>Taco Bell, Sonic</td>
<td></td>
</tr>
<tr>
<td>Sodexo:</td>
<td>Einstein Bros. Bagels, Chick-fil-A, Wow Cafe &amp; Wingery, Subway, Pizza Hut, Ufood Grill, Jamba Juice, Taco Bell, Papa John’s, Baja Fresh, Erbert and Gerbert’s Sandwich Shop, Burger King, Moe’s Southwest Grill, Qdoba Mexican Eats, Quiznos, Steak ‘N Shake, Tim Hortons, Au Bon Pain, Denny’s, Garbanzo Mediterranean Fresh, Hot Stuff Pizza, Mcalister’s Deli, Chester’s, Godfather’s Pizza, Nrgize Lifestyle Cafe, Sbarro, the Coffee Bean &amp; Tea Leaf, Freshii, Mooyah</td>
<td></td>
</tr>
<tr>
<td>Boddie-Noell Enterprises:</td>
<td>Hardee’s</td>
<td></td>
</tr>
<tr>
<td>Sizzling Platter:</td>
<td>Little Caesars, Wingstop, Dunkin', Sizzler</td>
<td></td>
</tr>
<tr>
<td>Mason-Harrison-Ratliff Enterprises:</td>
<td>Sonic</td>
<td></td>
</tr>
<tr>
<td>Meritage Hospitality:</td>
<td>Wendy’s</td>
<td></td>
</tr>
<tr>
<td>The Covelli Family Limited Partnership:</td>
<td>Panera Bread, Charleys, DQ Grill &amp; Chill, DQ Treat</td>
<td></td>
</tr>
<tr>
<td>American West Restaurant Co.:</td>
<td>Pizza Hut</td>
<td></td>
</tr>
<tr>
<td>K-mac Enterprises:</td>
<td>Taco Bell, KFC</td>
<td></td>
</tr>
<tr>
<td>RPM Pizza:</td>
<td>Domino's Pizza</td>
<td></td>
</tr>
<tr>
<td>Pacific Bells:</td>
<td>Taco Bell, Buffalo Wild Wings</td>
<td></td>
</tr>
<tr>
<td>ADF Companies:</td>
<td>Pizza Hut, Panera Bread</td>
<td></td>
</tr>
<tr>
<td>HMS Host:</td>
<td>Burger King, Sbarro, Cinnabon, Quiznos, Chili’s, Roy Rogers, Pizza Hut, Popeyes Louisiana Kitchen, Nathan’s Famous, Chick-fil-A, Famous Famiglia Pizzeria, Smashburger, Shula Burger, Johnny Rockets, KFC, Pinkberry, Einstein Bros. Bagels, Steak 'n Shake, La Madeleine French Bakery &amp; Cafe, Firehouse Subs, Godfather’s Pizza, Great Steak, Kelly’s Cajun Grill,</td>
<td></td>
</tr>
</tbody>
</table>
Moe's Southwest Grill, Salsarita's Fresh Mexican Grill, the Counter, Yeung's Lotus Express, Panda Express, Pizza Studio, Pizza Bell Hop, the Coffee Bean & Tea Leaf, Blimpie, Burgerfi, Carl's Jr., Blaze Pizza

• Compass Group USA: 259
  Papa John's, Einstein Bros. Bagels, Subway, Au Bon Pain, Moe's Southwest Grill, Pizza Hut, Denny's, Jamba Juice, Quiznos, Smashburger, Blimpie, Caribou Coffee, Pj's Coffee of New Orleans, Salsarita's Fresh Mexican Grill, Taco Bell, Wendy's, Tim Hortons, Which Wich, Bojangles', Burger King, Chili's, Erbert and Gerbert's Sandwich Shop, Freshii, Marco's Pizza, Sbarro, Steak 'N Shake, Tossed, California Tortilla, Illy, IHOP, Johnny Rockets, KFC, Nathan's Famous, Pita Pit, Slim Chickens

• TA Operating Co.: 251
  Popeyes Louisiana Kitchen, Subway, Burger King, Taco Bell, Pizza Hut, Dunkin', Starbucks, Taco Bell/pizza Hut, Arby's, Fazoli's, Sbarro, A&W, Charleys Philly Steaks, Wendy's, Tim Hortons, Taco Time, Carl's Jr., Chester's, DQ Grill & Chill, Boston Market, Baskin-Robbins, Quaker Steak & Lube Express

• Mitra QSR: 250
  KFC, Taco Bell

• Cafua Management: 247
  Dunkin', Baskin-Robbins

• Fugate Enterprises: 244
  Pizza Hut, Taco Bell

• Desert De Oro Foods: 236
  Taco Bell, Pizza Hut

• D. L. Rogers: 230
  Sonic

• B & B Consultants: 229
  Sonic

• Circle K Stores: 220
  Subway, Hot Stuff Pizza, Blimpie, Church's Chicken, Hardee's, DQ Treat, DQ Grill & Chill, Noble Roman's, Huddle House

• EYM Group: 216
  Burger King, Pizza Hut, Denny's

• Charter Foods: 215
  Taco Bell, Long John Silver's, A&W, KFC
• JAE Restaurant Group: Wendy's
• Fourteen Foods: DQ Grill & Chill, DQ Treat
• Quality Dining: Burger King, Chili’s
• DEKK Group: Dunkin’, Baskin-Robbins
• Falcon Holdings: Long John Silver’s, Church’s Chicken
• Wendpartners Franchise Group: Wendy’s
• Cotti Foods: Wendy’s, Taco Bell, Pieology
• Seawend Ltd/cedar Enterprises: Wendy’s
• Border Foods: Taco Bell
• The Briad Group: Wendy’s, TGI Fridays, Zinburger
• Starboard Group: Wendy’s
• Marwaha Group: Subway, Yogurtland
• Apple Investors Group: Burger King, Applebee's, Pizza Hut, IHOP, Stevi B’s
• Palo Alto: Taco Bell, Pizza Hut
• RMH Franchise: Applebee's
• Celebration Restaurant Group/ CFL Pizza/Bravo Foods: Pizza Hut, Taco Bell, KFC
• Haza Foods: Wendy’s
• Sundance: Taco Bell, KFC, Pizza Hut
• Midwest Subway Development: Subway
• PJ United: Papa John’s
• Pac Partners: Pizza Hut
• Wendy of Colorado Springs: Wendy’s, Golden Corral
• JRN: KFC, Pizza Hut
• Interfoods of America (Sailormen): Popeyes Louisiana Kitchen, Burger King
• Hamra Enterprises: Wendy's, Panera Bread, Noodles & Company
• GHAI Management: Burger King, Taco Bell
• Wks Restaurant Group: Wendy’s, Denny’s, Krispy Kreme Doughnuts
• Carlsie: Wendy’s
• Hoogland Foods: Marco’s Pizza
• Davco Restaurants: Wendy’s
• Alvarado Concepts: Taco Bell, KFC
• Doherty Enterprises: Applebee’s, Panera Bread, Quaker Steak, Noodles & Company
• California Food Management: Burger King
• Summit Restaurant Group: Pizza Hut, Long John Silver’s
• Northwest Restaurants: Taco Bell, KFC, A&W, Pizza Hut, Long John Silver’s
• East Tennessee Subway: 140 Subway
• Servus! (BR Associates)/Sidal: 138 Long John Silver's, Wendy's, Denny's, Grandy's, Mcalister's Deli
• American Pizza Partners: 133 Pizza Hut
• Hallrich (The Inner Crust): 132 Pizza Hut
• Valenti Management: 132 Wendy's, Chili's
• DMSD Foods: 131 Jack in the Box
• Toms King: 130 Burger King
• Premier Kings: 129 Burger King
• Cambridge Franchise Holdings: 128 Burger King
• America's Pizza Company: 125 Pizza Hut
• Burgerbusters: 125 Taco Bell
• Luihn Food System: 125 Taco Bell, KFC, Pizza Hut
• Burgerbusters: 125 Taco Bell, KFC, Pizza Hut
• Starcorp: 124 Hardee's, Carl's Jr.
• BLD Brands (Serazen): 123 Papa John's, Hardee's

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 Brand Ranking

Since 1988, Entrepreneur has ranked franchisers in its Franchise 500 Ranking. Franchised brands are rated based on five criteria, as follows:

- Costs & Fees
- Size & Growth
- Support
- Brand Strength
- Financial Strength & Stability

The 2018 Franchise 500 Ranking includes 108 restaurant brands, as follows:

- McDonald's: #1 $1.1M - $2.2M
- Dunkin': #3 $229K - $1.7M
- Sonic Drive-In: #6 $865K - $3.6M
- Taco Bell: #8 $525K - $2.6M
- Hardee's Restaurants: #9 $1.5M - $2.0M
- Jimmy John's Gourmet Sandwiches: #11 $330K - $558K
- Culver's: #13 $2.0M - $4.7M
- Carl's Jr. Restaurants: #15 $1.6M - $2.2M
- Papa John's: #16 $130K - $2.2M
- Jersey Mike's Subs: #24 $179K - $746K
- Marco's Pizza: #25 $290K - $763K
- Wingstop Restaurants: #31 $347K - $733K
- Smoothie King: #35 $264K - $844K
- Firehouse Subs: #39 $92K - $825K
- Baskin-Robbins: #41 $94K - $402K
- Jack in the Box: #43 $1.5M - $3.3M
- Freddy's Frozen Custard & Steakburgers: #44 $578K - $2.0M
- Pizza Hut LLC: #47 $327K - $2.3M
- Golden Corral Restaurants: #54 $2.2M - $6.6M
- Bojangles' Famous Chicken 'n Biscuits: #57 $1.5M - $2.4M
- Dairy Queen: #67 $1.1M - $1.8M
- Tropical Smoothie Cafe: #71 $222K - $569K
- Denny's: #76 $228K - $2.5M
- Kona Ice: #83 $125K - $148K
- Kilwins Chocolates: #94 $423K - $790K
- Blaze Fast-Fire'd Pizza: #95 $454K - $1.1M
<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Rank</th>
<th>Sales Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinnabon</td>
<td>#98</td>
<td>$185K - $331K</td>
</tr>
<tr>
<td>Subway</td>
<td>#105</td>
<td>$150K - $329K</td>
</tr>
<tr>
<td>Arby's</td>
<td>#112</td>
<td>$321K - $2.0M</td>
</tr>
<tr>
<td>McAlister's Deli</td>
<td>#114</td>
<td>$762K - $2.0M</td>
</tr>
<tr>
<td>Auntie Anne's</td>
<td>#124</td>
<td>$199K - $385K</td>
</tr>
<tr>
<td>Jet's Pizza</td>
<td>#127</td>
<td>$458K - $651K</td>
</tr>
<tr>
<td>HoneyBaked Ham</td>
<td>#130</td>
<td>$302K - $502K</td>
</tr>
<tr>
<td>Checkers Drive-In Restaurants</td>
<td>#140</td>
<td>$96K - $1.5M</td>
</tr>
<tr>
<td>Chester's</td>
<td>#153</td>
<td>$12K - $287K</td>
</tr>
<tr>
<td>Charleys Philly Steaks</td>
<td>#160</td>
<td>$252K - $581K</td>
</tr>
<tr>
<td>Wienerschnitzel</td>
<td>#166</td>
<td>$304K - $1.4M</td>
</tr>
<tr>
<td>la Madeleine French Bakery &amp; Cafe</td>
<td>#167</td>
<td>$1.5M - $2.3M</td>
</tr>
<tr>
<td>Dickey's Barbecue Pit</td>
<td>#170</td>
<td>$290K - $421K</td>
</tr>
<tr>
<td>Penn Station East Coast Subs</td>
<td>#177</td>
<td>$291K - $594K</td>
</tr>
<tr>
<td>Round Table Pizza</td>
<td>#187</td>
<td>$427K - $836K</td>
</tr>
<tr>
<td>Del Taco Fresh Mexican Grill</td>
<td>#188</td>
<td>$860K - $2.1M</td>
</tr>
<tr>
<td>Donatos</td>
<td>#195</td>
<td>$376K - $700K</td>
</tr>
<tr>
<td>Which Wich</td>
<td>#204</td>
<td>$203K - $495K</td>
</tr>
<tr>
<td>Farmer Boys Restaurants</td>
<td>#206</td>
<td>$1.1M - $1.6M</td>
</tr>
<tr>
<td>Black Bear Diner</td>
<td>#211</td>
<td>$1.1M - $1.9M</td>
</tr>
<tr>
<td>Brass Tap</td>
<td>#213</td>
<td>$781K - $1.3M</td>
</tr>
<tr>
<td>Hungry Howie's Pizza &amp; Subs</td>
<td>#214</td>
<td>$228K - $475K</td>
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<tr>
<td>Moe's Southwest Grill</td>
<td>#219</td>
<td>$446K - $997K</td>
</tr>
<tr>
<td>Great American Cookies</td>
<td>#222</td>
<td>$161K - $461K</td>
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<tr>
<td>Roy Rogers Restaurants</td>
<td>#229</td>
<td>$767K - $1.6M</td>
</tr>
<tr>
<td>Schlotzsky's</td>
<td>#231</td>
<td>$504K - $788K</td>
</tr>
<tr>
<td>Bahama Buck's</td>
<td>#232</td>
<td>$233K - $833K</td>
</tr>
<tr>
<td>KFC</td>
<td>#233</td>
<td>$1.4M - $2.8M</td>
</tr>
<tr>
<td>Hooters</td>
<td>#236</td>
<td>$957K - $4.3M</td>
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<tr>
<td>Rosati's Pizza</td>
<td>#239</td>
<td>$136K - $1.2M</td>
</tr>
<tr>
<td>L&amp;L Hawaiian Barbecue</td>
<td>#240</td>
<td>$136K - $527K</td>
</tr>
<tr>
<td>Gyu-Kaku Japanese BBQ Restaurant</td>
<td>#246</td>
<td>$1.0M - $2.1M</td>
</tr>
<tr>
<td>Old Chicago Pizza &amp; Taproom</td>
<td>#254</td>
<td>$1.4M - $2.2M</td>
</tr>
<tr>
<td>Capriotti's Sandwich Shop</td>
<td>#259</td>
<td>$365K - $793K</td>
</tr>
<tr>
<td>Ben &amp; Jerry's</td>
<td>#261</td>
<td>$149K - $504K</td>
</tr>
<tr>
<td>Wetzel's Pretzels</td>
<td>#268</td>
<td>$165K - $406K</td>
</tr>
<tr>
<td>Potbelly Sandwich Shop</td>
<td>#269</td>
<td>$504K - $849K</td>
</tr>
<tr>
<td>Gloria Jean's Coffees</td>
<td>#274</td>
<td>$173K - $473K</td>
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<tr>
<td>The Greene Turtle Sports Bar &amp; Grille</td>
<td>#277</td>
<td>$1.5M - $2.7M</td>
</tr>
<tr>
<td>Champs Chicken</td>
<td>#281</td>
<td>$9K - $349K</td>
</tr>
<tr>
<td>Rock &amp; Brews</td>
<td>#285</td>
<td>$1.5M - $4.2M</td>
</tr>
<tr>
<td>The Melting Pot Restaurants</td>
<td>#289</td>
<td>$1.5M - $1.7M</td>
</tr>
<tr>
<td>Buffalo Wings &amp; Rings</td>
<td>#293</td>
<td>$1.3M - $2.4M</td>
</tr>
<tr>
<td>Native Grill &amp; Wings</td>
<td>#295</td>
<td>$998K - $2.6M</td>
</tr>
</tbody>
</table>
54.2 Franchised Units

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.

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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>Restaurant Name</th>
<th>Franchised Units</th>
<th>Pct. of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subway:</td>
<td>26,530</td>
<td>100%</td>
</tr>
<tr>
<td>McDonald’s:</td>
<td>12,836</td>
<td>89%</td>
</tr>
<tr>
<td>Dunkin’:</td>
<td>8,047</td>
<td>99%</td>
</tr>
<tr>
<td>Pizza Hut:</td>
<td>7,337</td>
<td>93%</td>
</tr>
<tr>
<td>Burger King:</td>
<td>7,077</td>
<td>99%</td>
</tr>
<tr>
<td>7-Eleven:</td>
<td>6,390</td>
<td>87%</td>
</tr>
<tr>
<td>Taco Bell:</td>
<td>4,995</td>
<td>84%</td>
</tr>
<tr>
<td>Wendy’s:</td>
<td>4,895</td>
<td>85%</td>
</tr>
<tr>
<td>Domino’s:</td>
<td>4,690</td>
<td>93%</td>
</tr>
<tr>
<td>Starbucks Coffee:</td>
<td>4,659</td>
<td>39%</td>
</tr>
<tr>
<td>Dairy Queen:</td>
<td>4,444</td>
<td>99%</td>
</tr>
<tr>
<td>KFC:</td>
<td>4,164</td>
<td>95%</td>
</tr>
<tr>
<td>Little Caesars Pizza:</td>
<td>3,528</td>
<td>86%</td>
</tr>
<tr>
<td>Sonic America’s Drive-In:</td>
<td>3,127</td>
<td>89%</td>
</tr>
<tr>
<td>Papa John’s Pizza:</td>
<td>2,564</td>
<td>79%</td>
</tr>
<tr>
<td>Baskin-Robbins:</td>
<td>2,478</td>
<td>99%</td>
</tr>
<tr>
<td>Arby’s:</td>
<td>2,286</td>
<td>71%</td>
</tr>
<tr>
<td>Jimmy John’s Gourmet Sandwiches:</td>
<td>2,071</td>
<td>98%</td>
</tr>
<tr>
<td>Chick-fil-A:</td>
<td>1,871</td>
<td>100%</td>
</tr>
<tr>
<td>Applebee’s Neighborhood Grill &amp; Bar:</td>
<td>1,847</td>
<td>99%</td>
</tr>
<tr>
<td>Jack in the Box:</td>
<td>1,818</td>
<td>80%</td>
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<tr>
<td>Popeyes Louisiana Kitchen:</td>
<td>1,805</td>
<td>96%</td>
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<tr>
<td>IHOP:</td>
<td>1,568</td>
<td>99%</td>
</tr>
<tr>
<td>Denny’s:</td>
<td>1,435</td>
<td>90%</td>
</tr>
<tr>
<td>Hardee’s:</td>
<td>1,370</td>
<td>77%</td>
</tr>
<tr>
<td>Papa Murphy’s Take ‘N’ Bake Pizza:</td>
<td>1,342</td>
<td>94%</td>
</tr>
<tr>
<td>Auntie Anne’s:</td>
<td>1,154</td>
<td>99%</td>
</tr>
<tr>
<td>Quiznos:</td>
<td>978</td>
<td>99%</td>
</tr>
<tr>
<td>Cold Stone Creamery:</td>
<td>912</td>
<td>99%</td>
</tr>
<tr>
<td>Church’s Chicken:</td>
<td>907</td>
<td>78%</td>
</tr>
<tr>
<td>Tim Hortons:</td>
<td>881</td>
<td>99%</td>
</tr>
<tr>
<td>Jersey Mike’s Subs:</td>
<td>823</td>
<td>96%</td>
</tr>
<tr>
<td>Long John Silver’s:</td>
<td>815</td>
<td>100%</td>
</tr>
<tr>
<td>Firehouse Subs:</td>
<td>808</td>
<td>96%</td>
</tr>
<tr>
<td>Five Guys Burgers and Fries:</td>
<td>785</td>
<td>67%</td>
</tr>
<tr>
<td>Carl’s Jr.:</td>
<td>758</td>
<td>66%</td>
</tr>
<tr>
<td>Waffle House:</td>
<td>750</td>
<td>41%</td>
</tr>
<tr>
<td>Circle K:</td>
<td>706</td>
<td>18%</td>
</tr>
<tr>
<td>A&amp;W All American Food:</td>
<td>674</td>
<td>99%</td>
</tr>
<tr>
<td>Wingstop:</td>
<td>652</td>
<td>97%</td>
</tr>
<tr>
<td>Buffalo Wild Wings Grill &amp; Bar:</td>
<td>579</td>
<td>55%</td>
</tr>
</tbody>
</table>
• Marco’s Pizza: 578 100%
• Moe’s Southwest Grill: 577 99%
• Smoothie King: 568 96%
• Godfather’s Pizza: 553 97%
• Zaxby’s: 546 83%
• Jamba Juice: 543 67%
• Hungry Howie’s Pizza: 533 97%
• Culver’s: 521 99%
• Dickey’s Barbecue Pit: 506 98%
• Chili’s Grill & Bar: 435 34%
• CiCi’s Pizza: 433 96%
• Tropical Smoothie Cafe: 410 100%
• Charley’s Grilled Subs/Charleys Philly Steaks: 398 89%
• Golden Corral: 392 78%
• Taco John’s: 383 97%
• Round Table Pizza: 369 84%
• Bojangles’ Famous Chicken ‘n Biscuits: 368 59%
• Einstein Bros. Bagels: 360 47%
• Huddle House: 359 97%
• Qdoba Mexican Grill: 324 51%
• Wienerschnitzel: 322 100%
• Checkers: 321 63%
• Schlotzsky’s: 309 89%
• TGI Fridays: 308 61%
• McAlister’s Deli: 293 87%
• Penn Station East Coast Subs: 286 100%
• Perkins Restaurant & Bakery: 260 66%
• El Pollo Loco: 243 59%
• Del Taco: 242 44%
• Captain D’s Seafood Kitchen: 238 47%
• Beef ‘O’ Brady’s Family Sports Pub: 191 96%
• Pizza Ranch: 181 96%
• Johnny Rockets: 175 86%
• Krispy Kreme Doughnuts: 167 60%
• Baja Fresh Mexican Grill: 159 92%
• Hooters: 153 45%
• Sbarro, the Italian Eatery: 149 42%
• Rally’s Hamburgers: 145 49%
• Friendly’s: 144 51%
• Famous Dave’s: 136 73%
• Caribou Coffee: 129 32%
• Krystal: 127 36%
• The Melting Pot: 126 98%
• Smashburger: 122 42%
• Steak ‘n Shake: 122 23%
• Freddy’s Frozen Custard & Steakburgers: 121 90%
• Whataburger: 118 15%
• Sizzler: 110 87%
• Sonny’s Real Pit Bar-B-Q: 109 92%
• Jason’s Deli: 106 42%
• Big Boy/Frisch’s Big Boy: 105 47%
• Outback Steakhouse: 105 14%
• Shoney’s: 103 63%
• Fuddruckers: 102 59%
• Donatos Pizza: 100 66%
• Red Robin Gourmet Burgers & Brews: 99 20%
• Bruegger’s Bagels: 98 35%
• Fazoli’s: 88 42%
• Village Inn: 86 41%
• Panda Express: 75 4%
• Au Bon Pain: 74 35%
• Corner Bakery Cafe: 70 38%
• Texas Roadhouse: 70 16%
• Sarku Japan: 68 29%
• Cheddar’s Scratch Kitchen: 65 41%
• Black Bear Diner: 61 91%
• Rusty’s Chris Steak House: 56 46%
• Carino’s Italian: 55 56%
• Noodles & Company: 53 12%
• Raising Cane’s Chicken Fingers: 51 25%
• Houlihan’s: 44 58%
• 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%
• Zoës 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
• Bertucci’s Italian Restaurant
• BJ’s Restaurant & Brewhouse
• Bob Evans Restaurants
• Braum’s Ice Cream and Dairy Stores
• Bravo! Cucina Italiana
• Brio Tuscan Grille
• Bubba Gump Shrimp Co.
• Buca di Beppo
• Cafe Rio Mexican Grill
• Carrabba’s Italian Grill
• Casey’s General Stores
• Chipotle Mexican Grill
• Chuy’s
• Claim Jumper
• Costco
• Cracker Barrel Old Country Store
• Dave & Buster’s
• Eat’n Park
• El Torito
• Fogo de Chão
• 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
Entrepreneur, 18061 Fitch, Irvine, CA 92614. (www.entrepreneur.com)

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 2018), the following independent restaurants have the highest annual gross revenue:

<table>
<thead>
<tr>
<th>Restaurant Name</th>
<th>Sales</th>
<th>Meals Served</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tao Las Vegas (Las Vegas, NV)</td>
<td>$43,447,100</td>
<td>230,668</td>
</tr>
<tr>
<td>Joe's Stone Crab (Miami Beach, FL)</td>
<td>$35,860,000</td>
<td>306,000</td>
</tr>
<tr>
<td>Carmine's (New York, NY)</td>
<td>$35,155,786</td>
<td>430,773</td>
</tr>
<tr>
<td>Tao Downtown (New York, NY)</td>
<td>$34,337,000</td>
<td>320,600</td>
</tr>
<tr>
<td>Old Ebbitt Grill (Washington, DC)</td>
<td>$33,749,638</td>
<td>1,462,781</td>
</tr>
<tr>
<td>The Boathouse (Disney Springs, FL)</td>
<td>$33,030,849</td>
<td>790,174</td>
</tr>
<tr>
<td>Lavo Italian Restaurant &amp; Nightclub (New York, NY)</td>
<td>$27,412,000</td>
<td>206,000</td>
</tr>
<tr>
<td>Bryant Park Grill &amp; Cafe (New York, NY)</td>
<td>$25,900,000</td>
<td>422,000</td>
</tr>
<tr>
<td>Gibsons Bar &amp; Steakhouse (Chicago, IL)</td>
<td>$25,414,213</td>
<td>357,897</td>
</tr>
<tr>
<td>Smith &amp; Wollensky (New York, NY)</td>
<td>$25,407,000</td>
<td>285,542</td>
</tr>
<tr>
<td>Balthazar (New York, NY)</td>
<td>$25,000,000</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Tao Uptown (New York, NY)</td>
<td>$23,782,000</td>
<td>292,342</td>
</tr>
<tr>
<td>Junior's Times Square (New York, NY)</td>
<td>$23,478,798</td>
<td>1,202,191</td>
</tr>
<tr>
<td>Vandal (New York, NY)</td>
<td>$23,444,108</td>
<td>213,320</td>
</tr>
<tr>
<td>Prime 112 (Miami Beach, FL)</td>
<td>$23,400,000</td>
<td>202,000</td>
</tr>
<tr>
<td>The Hamilton (Washington, DC)</td>
<td>$23,048,871</td>
<td>782,486</td>
</tr>
<tr>
<td>Joe's Seafood, Prime Steak &amp; Stone Crab</td>
<td>$22,800,000</td>
<td>280,000</td>
</tr>
<tr>
<td>(Washington, DC)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Joe's Seafood, Prime Steak &amp; Stone Crab (Las Vegas, NV)</td>
<td>$21,700,000</td>
<td>260,000</td>
</tr>
<tr>
<td>Angus Barn (Raleigh, NC)</td>
<td>$21,659,790</td>
<td>313,910</td>
</tr>
<tr>
<td>Joe's Seafood, Prime Steak &amp; Stone Crab (Chicago, IL)</td>
<td>$21,300,000</td>
<td>265,000</td>
</tr>
<tr>
<td>Buddakan (New York, NY)</td>
<td>$21,156,072</td>
<td>260,000</td>
</tr>
<tr>
<td>Bottega Louie (Los Angeles, CA)</td>
<td>$20,729,140</td>
<td>408,663</td>
</tr>
<tr>
<td>Carnevino Italian Steakhouse (Las Vegas, NV)</td>
<td>$20,600,000</td>
<td>110,000</td>
</tr>
<tr>
<td>Maple &amp; Ash (Chicago, IL)</td>
<td>$20,342,976</td>
<td>210,223</td>
</tr>
<tr>
<td>Bazaar Meat by Jose Andres (Las Vegas, NV)</td>
<td>$20,300,000</td>
<td>194,000</td>
</tr>
<tr>
<td>RPM Steak (Chicago, IL)</td>
<td>$20,250,000</td>
<td>206,900</td>
</tr>
<tr>
<td>SW Steakhouse (Las Vegas, NV)</td>
<td>$20,100,000</td>
<td>152,000</td>
</tr>
<tr>
<td>Paddlefish (Disney Springs, FL)</td>
<td>$19,500,000</td>
<td>410,000</td>
</tr>
<tr>
<td>Komodo (Miami, FL)</td>
<td>$19,500,000</td>
<td>220,000</td>
</tr>
</tbody>
</table>

*Restaurant, Food & Beverage Market Research Handbook 2020-2021*
<table>
<thead>
<tr>
<th>Restaurant, Location</th>
<th>Initial Investment</th>
<th>Last Year Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Elmo Steak House (Indianapolis, IN)</td>
<td>$19,472,840</td>
<td>239,725</td>
</tr>
<tr>
<td>The Smith - Lincoln Square (New York, NY)</td>
<td>$19,250,000</td>
<td>554,929</td>
</tr>
<tr>
<td>Parc (Philadelphia, PA)</td>
<td>$19,110,230</td>
<td>440,000</td>
</tr>
<tr>
<td>Quality Meats (New York, NY)</td>
<td>$18,739,000</td>
<td>175,378</td>
</tr>
<tr>
<td>The Smith - NoMad (New York, NY)</td>
<td>$18,600,000</td>
<td>460,357</td>
</tr>
<tr>
<td>Abe &amp; Louie's (Boston, MA)</td>
<td>$18,398,313</td>
<td>223,000</td>
</tr>
<tr>
<td>Le Diplomate (Washington, DC)</td>
<td>$18,370,665</td>
<td>309,000</td>
</tr>
<tr>
<td>Gibsons Bar &amp; Steakhouse (Oak Brook, IL)</td>
<td>$18,279,234</td>
<td>267,387</td>
</tr>
<tr>
<td>Sparks Steak House (New York, NY)</td>
<td>$18,200,000</td>
<td>210,000</td>
</tr>
<tr>
<td>The Smith - Midtown (New York, NY)</td>
<td>$18,150,000</td>
<td>440,301</td>
</tr>
<tr>
<td>Bob Chinn's Crab House (Wheeling, IL)</td>
<td>$18,133,238</td>
<td>575,567</td>
</tr>
<tr>
<td>Gibsons Bar &amp; Steakhouse (Rosemont, IL)</td>
<td>$18,070,922</td>
<td>257,847</td>
</tr>
<tr>
<td>Del Posto (New York, NY)</td>
<td>$17,900,000</td>
<td>111,000</td>
</tr>
<tr>
<td>Founding Farmers (Washington, DC)</td>
<td>$17,888,388</td>
<td>560,662</td>
</tr>
<tr>
<td>Mon Ami Gabi (Las Vegas, NV)</td>
<td>$17,650,000</td>
<td>315,000</td>
</tr>
<tr>
<td>Acme Feed &amp; Seed (Nashville, TN)</td>
<td>$17,604,313</td>
<td>951,584</td>
</tr>
<tr>
<td>‘21’ Club (New York, NY)</td>
<td>$17,550,313</td>
<td>114,570</td>
</tr>
<tr>
<td>Tavern on the Green (New York, NY)</td>
<td>$17,500,000</td>
<td>262,000</td>
</tr>
<tr>
<td>Chicago Cut Steakhouse (Chicago, IL)</td>
<td>$17,400,000</td>
<td>211,000</td>
</tr>
<tr>
<td>Shaw’s Crab House (Chicago, IL)</td>
<td>$17,350,000</td>
<td>270,000</td>
</tr>
<tr>
<td>Quality Italian (New York, NY)</td>
<td>$16,805,000</td>
<td>175,301</td>
</tr>
<tr>
<td>Aria Cafe (Las Vegas, NV)</td>
<td>$16,700,000</td>
<td>690,000</td>
</tr>
<tr>
<td>Prime Steakhouse (Las Vegas, NV)</td>
<td>$16,700,000</td>
<td>113,000</td>
</tr>
<tr>
<td>Beauty &amp; Essex (New York, NY)</td>
<td>$16,665,500</td>
<td>195,717</td>
</tr>
<tr>
<td>Grand Central Oyster Bar (New York, NY)</td>
<td>$16,650,000</td>
<td>308,000</td>
</tr>
<tr>
<td>Lavo Italian Restaurant &amp; Lounge (Las Vegas, NV)</td>
<td>$16,512,000</td>
<td>139,000</td>
</tr>
<tr>
<td>Harris Ranch Inn &amp; Restaurant (Coalinga, CA)</td>
<td>$16,502,654</td>
<td>593,803</td>
</tr>
<tr>
<td>Chops Lobster Bar (Atlanta, GA)</td>
<td>$16,300,000</td>
<td>196,000</td>
</tr>
<tr>
<td>Taste of Texas (Houston, TX)</td>
<td>$16,222,119</td>
<td>363,650</td>
</tr>
<tr>
<td>Keens Steakhouse (New York, NY)</td>
<td>$16,200,000</td>
<td>180,000</td>
</tr>
<tr>
<td>Top of the World (Las Vegas, NV)</td>
<td>$16,150,000</td>
<td>175,000</td>
</tr>
<tr>
<td>La Sirena (New York, NY)</td>
<td>$16,100,000</td>
<td>225,000</td>
</tr>
<tr>
<td>Morimoto Asia (Disney Springs, FL)</td>
<td>$16,050,000</td>
<td>499,000</td>
</tr>
<tr>
<td>Delmonico Steakhouse (Las Vegas, NV)</td>
<td>$16,000,000</td>
<td>148,000</td>
</tr>
<tr>
<td>Zehnder's of Frankenmuth (Frankenmuth, MI)</td>
<td>$15,902,244</td>
<td>965,039</td>
</tr>
<tr>
<td>Junior's Restaurant - 49th Street (New York, NY)</td>
<td>$15,498,945</td>
<td>797,270</td>
</tr>
<tr>
<td>Swift &amp; Sons (Chicago, IL)</td>
<td>$15,125,746</td>
<td>153,693</td>
</tr>
<tr>
<td>The Lobster House (Cape May, NJ)</td>
<td>$15,000,000</td>
<td>320,000</td>
</tr>
<tr>
<td>Hugo's Frog Bar &amp; Fish House (Chicago, IL)</td>
<td>$14,982,768</td>
<td>187,768</td>
</tr>
<tr>
<td>Frankenmuth Bavarian Inn (Frankenmuth, MI)</td>
<td>$14,979,373</td>
<td>848,141</td>
</tr>
<tr>
<td>Makoto (Bal Harbour, FL)</td>
<td>$14,969,539</td>
<td>228,000</td>
</tr>
<tr>
<td>Harry Caray's Italian Steakhouse (Chicago, IL)</td>
<td>$14,900,000</td>
<td>295,000</td>
</tr>
<tr>
<td>Franciscan Crab Restaurant (San Francisco, CA)</td>
<td>$14,875,522</td>
<td>280,000</td>
</tr>
<tr>
<td>Paradise Cove Beach Cafe (Malibu, CA)</td>
<td>$14,767,831</td>
<td>410,000</td>
</tr>
<tr>
<td>Restaurant Name</td>
<td>Revenue</td>
<td>Employees</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>-----------</td>
<td>-----------</td>
</tr>
<tr>
<td>Portland City Grill (Portland, OR)</td>
<td>$14,640,607</td>
<td>304,884</td>
</tr>
<tr>
<td>Jean-Georges Steakhouse (Las Vegas, NV)</td>
<td>$14,600,000</td>
<td>127,000</td>
</tr>
<tr>
<td>The Southern Steak &amp; Oyster (Nashville, TN)</td>
<td>$14,576,128</td>
<td>352,813</td>
</tr>
<tr>
<td>Prime &amp; Provisions (Chicago, IL)</td>
<td>$14,540,000</td>
<td>147,000</td>
</tr>
<tr>
<td>The Bazaar by Jose Andres (Beverly Hills, CA)</td>
<td>$14,500,000</td>
<td>152,000</td>
</tr>
<tr>
<td>15th Street Fisheries (Fort Lauderdale, FL)</td>
<td>$14,400,000</td>
<td>352,000</td>
</tr>
<tr>
<td>Scoma's (San Francisco, CA)</td>
<td>$14,316,074</td>
<td>335,000</td>
</tr>
<tr>
<td>Junior's - Brooklyn (New York, NY)</td>
<td>$14,240,043</td>
<td>615,386</td>
</tr>
<tr>
<td>Coffee Shop (New York, NY)</td>
<td>$14,200,000</td>
<td>312,000</td>
</tr>
<tr>
<td>Cliff House (San Francisco, CA)</td>
<td>$14,130,000</td>
<td>286,000</td>
</tr>
<tr>
<td>Rustic Inn Crabhouse (Fort Lauderdale, FL)</td>
<td>$14,113,000</td>
<td>510,000</td>
</tr>
<tr>
<td>Atlanta Fish Market (Atlanta, GA)</td>
<td>$14,100,000</td>
<td>27,300</td>
</tr>
<tr>
<td>Quartino Ristorante &amp; Wine Bar (Chicago, IL)</td>
<td>$14,081,385</td>
<td>423,892</td>
</tr>
<tr>
<td>Carmine's (Atlantic City, NJ)</td>
<td>$13,871,386</td>
<td>131,416</td>
</tr>
<tr>
<td>Virgil's Real Barbecue (New York, NY)</td>
<td>$13,815,036</td>
<td>209,650</td>
</tr>
<tr>
<td>Tavern on Rush (Chicago, IL)</td>
<td>$13,721,225</td>
<td>350,000</td>
</tr>
<tr>
<td>Rock Center Cafe (New York, NY)</td>
<td>$13,500,000</td>
<td>320,000</td>
</tr>
<tr>
<td>Timberline Steaks and Grille (Denver, CO)</td>
<td>$13,415,751</td>
<td>994,442</td>
</tr>
<tr>
<td>Founding Farmers (McLean, VA)</td>
<td>$13,244,450</td>
<td>404,015</td>
</tr>
<tr>
<td>Mike's &quot;American&quot; (Springfield, VA)</td>
<td>$13,100,000</td>
<td>470,000</td>
</tr>
<tr>
<td>Le Coucou (New York, NY)</td>
<td>$12,959,000</td>
<td>154,000</td>
</tr>
<tr>
<td>George's at the Cove (La Jolla, CA)</td>
<td>$12,900,000</td>
<td>265,000</td>
</tr>
<tr>
<td>BOA Steakhouse (West Hollywood, CA)</td>
<td>$12,718,968</td>
<td>102,122</td>
</tr>
<tr>
<td>Cafe Fiorello (New York, NY)</td>
<td>$12,700,000</td>
<td>238,000</td>
</tr>
<tr>
<td>Boulevard (San Francisco, CA)</td>
<td>$12,500,000</td>
<td>122,000</td>
</tr>
<tr>
<td>Beauty &amp; Essex (Las Vegas, NV)</td>
<td>$12,430,000</td>
<td>142,500</td>
</tr>
<tr>
<td>Farmers, Fishers, Bakers (Washington, DC)</td>
<td>$12,420,373</td>
<td>383,238</td>
</tr>
</tbody>
</table>

### 55.2 Market Resources

*Restaurant Business*, 1 Tower Lane, Suite 2000, Oakbrook Terrace, IL 60181. (630) 574-5075. ([www.restaurantbusinessonlin.com](http://www.restaurantbusinessonlin.com))
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: 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, 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, Pizzeria Wine Bar, Quartino Ristorante

**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.landysseafood.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 Ba-Ba-Reeba!, Community Canteen, Di Pescara, Don & Charlie’s, Eiffel Tower Restaurant, El Segundo Sol Taqueria & Margarita Bar, Everest, foodlife, Frankie’s Scaloppine & Fifth Floor Pizzeria, Hub 51, Joe’s Seafood, Prime Steak, and Stone Crab, L. Woods Tap & Pine Lodge, L20, M Burger, M Street Kitchen, Maggiano’s Little Italy, Mity Nice Grill, Mon Ami Gabi, Nacional 27, Osteria via Stato, Paris Club, Petterino’s, Pizzeria via Stato, R.J. Grunts, Reel Club, RPM Pizza, Saranello’s, Scooziz!, Shaw’s Crab House, Stella Rossa Pizza Bar, Stripburger, The Magic Pan Crepe Stand, Tokio Pub, Tru, Tucci Benucch, Twin City Grill, Wildfire, Wow Bao

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, Loretta’s, 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)
• Areas of operation: OR, WA
• Annual sales: $116.0 million

Moana Restaurant Group (San Rafael, CA; 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)
• 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)
• 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
• Annual sales: $163.0 million
• Brands: Abe & Louie’s, Aquknox, Atlantic Fish, Atlas, Blackhawk Grille, Cafe Del Rey, California Cafe Bar & Grill, Canonita, Coach Grill, FREEBIRDS World Burrito, Joe’s American Bar & Grill, Napa Valley Grille, Sapporo, Zed 451

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, Pyamel, 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, 3710 Corporex Park Drive, Suite 310, Tampa, FL 33619. (800) 927-9292. (www.chainstoreguide.com)
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
- **Hyde Bellagio (Las Vegas, NV):** $25 million - $30 million
- **Story (Miami Beach, FL):** $25 million - $30 million
- **E11EVEN (Miami, FL):** $20 million - $25 million
- **LAVO Las Vegas (Las Vegas, NV):** $20 million - $25 million
- **LEVU Dallas (Dallas, TX):** $20 million - $25 million
- **Mango’s Tropical Café (Miami Beach, FL):** $20 million - $25 million
- **Seacrets (Ocean City, MD):** $20 million - $25 million
- **The Pool After Dark (Atlantic City, NJ):** $20 million - $25 million
- **Avenu Lounge (Dallas, TX):** $15 million - $20 million
- **Chandelier Bar (Las Vegas, NV):** $15 million - $20 million
- **Create Nightclub (Los Angeles, CA):** $15 million - $20 million
- **Marquee NY (New York, NY):** $15 million - $20 million
- **PHD at Dream Downtown (New York, NY):** $15 million - $20 million
- **Tryst Las Vegas (Las Vegas, NV):** $15 million - $20 million
- **207 (San Diego, CA):** $10 million - $15 million
- **AJ’s Club Bimini (Destin, FL):** $10 million - $15 million
- **Avalon Hollywood (Los Angeles, CA):** $10 million - $15 million
- **Avenue (New York, NY):** $10 million - $15 million
- **Bar Anticipation (Lake Como, NJ):** $10 million - $15 million
- **Chateau Nightclub & Rooftop (Las Vegas, NV):** $10 million - $15 million
- **Club db Lounge (Downey, CA):** $10 million - $15 million
- **Club Space (Miami, FL):** $10 million - $15 million
- **Float (San Diego, CA):** $10 million - $15 million
- **FLUXX (San Diego, CA):** $10 million - $15 million
- **Heat Ultra Lounge (Anaheim, CA):** $10 million - $15 million
<table>
<thead>
<tr>
<th>Restaurant/Club Name</th>
<th>Revenue Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hurricane O’ Reilly’s (Boston, MA)</td>
<td>$10 million - $15 million</td>
</tr>
<tr>
<td>Landmark Bar &amp; Kitchen (Fort Worth, TX)</td>
<td>$10 million - $15 million</td>
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<tr>
<td>Maya Day + Nightclub (Scottsdale, AZ)</td>
<td>$10 million - $15 million</td>
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<tr>
<td>Opera Nightclub (Atlanta, GA)</td>
<td>$10 million - $15 million</td>
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<tr>
<td>Passion Nightclub (Hollywood, FL)</td>
<td>$10 million - $15 million</td>
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<td>Plush (Dallas, TX)</td>
<td>$10 million - $15 million</td>
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<td>Roof on the Wit (Chicago, IL)</td>
<td>$10 million - $15 million</td>
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<tr>
<td>Sevilla Nightclub (San Diego, CA)</td>
<td>$10 million - $15 million</td>
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<tr>
<td>Shrine (Mashantucket, CT)</td>
<td>$10 million - $15 million</td>
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<tr>
<td>Sutra Nightclub (Newport Beach, CA)</td>
<td>$10 million - $15 million</td>
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<tr>
<td>Temple Nightclub (San Francisco, CA)</td>
<td>$10 million - $15 million</td>
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<tr>
<td>The Abbey Food &amp; Bar (Los Angeles, CA)</td>
<td>$10 million - $15 million</td>
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<tr>
<td>Thrive Nightclub (Dallas, TX)</td>
<td>$10 million - $15 million</td>
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<tr>
<td>VIP Room (New York, NY)</td>
<td>$10 million - $15 million</td>
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<td>Webster Hall (New York, NY)</td>
<td>$10 million - $15 million</td>
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<tr>
<td>Baja Sharkeez (Hermosa Beach, CA)</td>
<td>$5 million - $10 million</td>
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<td>Baja Sharkeez (Huntington Beach, CA)</td>
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<td>Baja Sharkeez (Newport Beach, CA)</td>
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<td>Bassmnt Nightclub (San Diego, CA)</td>
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<tr>
<td>Bond Bar (Las Vegas, NV)</td>
<td>$5 million - $10 million</td>
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<td>Bounce Sporting Club (New York, NY)</td>
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<tr>
<td>Cake Nightclub (Scottsdale, AZ)</td>
<td>$5 million - $10 million</td>
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<tr>
<td>Celebrations Nitelife (Myrtle Beach, SC)</td>
<td>$5 million - $10 million</td>
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<tr>
<td>Dream Nightclub (Miami, FL)</td>
<td>$5 million - $10 million</td>
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<td>echostage (Washington, DC)</td>
<td>$5 million - $10 million</td>
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<tr>
<td>Emerson Theatre (Los Angeles, CA)</td>
<td>$5 million - $10 million</td>
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<tr>
<td>Ghostbar (Las Vegas, NV)</td>
<td>$5 million - $10 million</td>
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<td>Greystone Manor (Los Angeles, CA)</td>
<td>$5 million - $10 million</td>
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<tr>
<td>Grizzly Rose (Denver, CO)</td>
<td>$5 million - $10 million</td>
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<tr>
<td>Havana Club (Atlanta, GA)</td>
<td>$5 million - $10 million</td>
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<tr>
<td>High Rollers (Mashantucket, CT)</td>
<td>$5 million - $10 million</td>
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<tr>
<td>Kilroy’s Bar n’ Grill (Indianapolis, IN)</td>
<td>$5 million - $10 million</td>
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<tr>
<td>Lagasse’s Stadium (Las Vegas, NV)</td>
<td>$5 million - $10 million</td>
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<tr>
<td>Marge’s Lakeside Inn (Rochester, NY)</td>
<td>$5 million - $10 million</td>
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<tr>
<td>Monarchy (West Palm Beach, FL)</td>
<td>$5 million - $10 million</td>
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<tr>
<td>Panama Joe’s Cantina (Long Beach, CA)</td>
<td>$5 million - $10 million</td>
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<tr>
<td>Playhouse Nightclub (Los Angeles, CA)</td>
<td>$5 million - $10 million</td>
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<tr>
<td>Pump Room Bar (Chicago, IL)</td>
<td>$5 million - $10 million</td>
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<tr>
<td>RIO Nightclub (Austin, TX)</td>
<td>$5 million - $10 million</td>
</tr>
<tr>
<td>Sandbar Cocina Y Tequila (Santa Barbara, CA)</td>
<td>$5 million - $10 million</td>
</tr>
<tr>
<td>Shade Lounge (Scottsdale, AZ)</td>
<td>$5 million - $10 million</td>
</tr>
<tr>
<td>Side Bar (San Diego, CA)</td>
<td>$5 million - $10 million</td>
</tr>
<tr>
<td>The Bourbon Room (Las Vegas, NV)</td>
<td>$5 million - $10 million</td>
</tr>
<tr>
<td>The Brahmin (Boston, MA)</td>
<td>$5 million - $10 million</td>
</tr>
</tbody>
</table>
• The Estate (Boston, MA): $ 5 million - $ 10 million
• The Huxley (Washington, DC): $ 5 million - $ 10 million
• The Library Bar (Chicago, IL): $ 5 million - $ 10 million
• The Scorpion Bar (Mashantucket, CT): $ 5 million - $ 10 million
• The Wood (San Diego, CA): $ 5 million - $ 10 million
• Vesper Bar (Las Vegas, NV): $ 5 million - $ 10 million
• Barley House (Cleveland, OH): $ 3 million - $ 5 million
• Chilkoot Charlie’s (Anchorage, AK): $ 3 million - $ 5 million
• Drink Houston (Houston, TX): $ 3 million - $ 5 million
• Eagles Nest Rockin’ Country Bar (Chesapeake, VA): $ 3 million - $ 5 million
• Kingston Mines (Chicago, IL): $ 3 million - $ 5 million
• La Puerta (San Diego, CA): $ 3 million - $ 5 million
• Luxx Nightclub (Dallas, TX): $ 3 million - $ 5 million
• Proof Rooftop Lounge (Houston, TX): $ 3 million - $ 5 million
• Round-Up Saloon (Dallas, TX): $ 3 million - $ 5 million
• SHOTS Miami (Miami, FL): $ 3 million - $ 5 million
• Sisu Uptown (Dallas, TX): $ 3 million - $ 5 million
• Skooter’s Roadhouse (Shorewood, IL): $ 3 million - $ 5 million
• Southern Railway Taphouse (Richmond, VA): $ 3 million - $ 5 million
• Southern Junction (Royse City, TX): $ 3 million - $ 5 million
• Teak Neighborhood Grill (Orlando, FL): $ 3 million - $ 5 million
• The Raven (New York, NY): $ 3 million - $ 5 million
• The Wild Rover (Boston, MA): $ 3 million - $ 5 million
• Whiskey River (Houston, TX): $ 3 million - $ 5 million
• Wild West (San Antonio, TX): $ 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
59

BEST NEW RESTAURANTS

59.1 Lists For 2018-2019

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

**Bon Appétit**
Best New Restaurants In America 2018
- Call (Denver, CO)
- Che Fico (San Francisco, CA)
- Drifter’s Wife (Portland, ME)
- Freedman’s (Los Angeles, CA)
- Maydan (Washington, DC)
- Nimblefish (Portland, OR)
- Nonesuch (Oklahoma City, OK)
- Nyum Bai (Oakland, CA)
- Ugly Baby (Brooklyn, NY)
- Yume Ga Arukara (Cambridge, MA)

**CNN**
Best New Restaurants To Try In 2019
- Best Friend by Roy Choi (Las Vegas, NV)
- ONE65 (San Francisco, CA)
- Philly Wing Fry, Union Market (Washington, DC)
- Time Out Market (Miami, FL)

**Gayot** ([www.gayot.com](http://www.gayot.com))
2018 Best New Restaurants In The U.S.
- Esther’s Kitchen (Las Vegas, NV)
- Free Rein (Chicago, IL)
- Frenchette (New York, NY)
- Homer (Seattle, WA)
- International Smoke (San Francisco, CA)
- Journeyman’s Food + Drink (Fullerton, CA)
- Safta (Denver, CO)
- Tesse (West Hollywood, CA)
- The Alden (Chamblee, GA)
The Best New Restaurants In America - 2019

- Alewife (Richmond, VA)
- Angler (San Francisco, CA)
- Big King (Providence, RI)
- Cafe La Trova (Miami, FL)
- Georgia James (Houston, TX)
- Henry at Life Hotel by JJ (New York, NY)
- Homer (Seattle, WA)
- Indigo (Houston, TX)
- Kyoten (Chicago, IL)
- Ma'am Sir (Los Angeles, CA)
- Nightshade (Los Angeles, CA)
- Shabushabu Macoron (New York, NY)
- Vianda (San Juan, PR)

James Beard Foundation
The Best New Restaurant in the U.S.: 2019

- Winner: Frenchette (New York, NY)
- Nominee: Adda Indian Canteen (New York, NY)
- Nominee: Andiario (West Chester, PA)
- Nominee: Angler (San Francisco, CA)
- Nominee: Atomix (New York, NY)
- Nominee: Bardea Food & Drink (Wilmington, DE)
- Nominee: Bavel (Los Angeles, CA)
- Nominee: Bywater American Bistro (New Orleans, LA)
- Nominee: Canard (Portland, OR)
- Nominee: Celeste (Somerville, MA)
- Nominee: Chickadee (Boston, MA)
- Nominee: Elle (Washington, DC)
- Nominee: Folk (Nashville, TN)
- Nominee: Kyoten (Chicago, IL)
- Nominee: Larder Delicatessen and Bakery (Cleveland, OH)
- Nominee: Lineage (Wailea, HI)
- Nominee: Majordomo (Los Angeles, CA)
- Nominee: Marrow (Detroit, MI)
- Nominee: Nyum Bai (Oakland, CA)
- Nominee: Passerotto (Chicago, IL)
- Nominee: Petra and the Beast (Dallas, TX)
- Nominee: Popol Vuh (Minneapolis, MN)
- Nominee: Q House (Denver, CO)
- Nominee: Sawyer (Seattle, WA)
- Nominee: Spoken English (Washington, DC)
- Nominee: Suerte (Austin, TX)
• Nominee: The Elysian Bar (New Orleans, LA)
• Nominee: The Stanley (Charlotte, NC)
• Nominee: The Surf Club Restaurant (Surfside, FL)
• Nominee: Vianda (San Juan, PR)

**Thrillist** ([www.thrillist.com](http://www.thrillist.com))
Best New Restaurants In America - December 2018
• Bavel (Los Angeles, CA)
• Cadence (Philadelphia, PA)
• Canard (Portland, OR)
• Fancy Radish (Washington, DC)
• Hai Hai (Minneapolis, MN)
• Kargi Gogo (Portland, OR)
• Nancy’s Hustle (Houston, TX)
• Nyum Bai (Oakland, CA)
• Passerotto (Chicago, IL)
• Renzo (Charleston, SC)
• SheWolf (Detroit, MI)
• Sofreh (Brooklyn, NY)
• Spoken English (Washington, DC)

**USA Today Readers’ Choice**
Best New Restaurant Winners: 2018
• Anthem (Austin, TX)
• Three Blacksmiths (Sperryville, VA)
• Wine Bar George (Orlando, FL)
• Gordon Ramsay Hell’s Kitchen (Las Vegas, NV)
• PARIS.HAWAII (Honolulu, HI)
• Chaatable (Nashville, TN)
• Hidden Fish Sushi (San Diego, CA)
• Spice Finch (Philadelphia, PA)
• Longway Tavern (New Orleans, LA)
• S.K.Y. (Chicago, IL)

**Zagat** ([www.zagat.com](http://www.zagat.com))
The Hottest New Restaurants In 15 American Cities - Winter 2018
• A Rake's Progress (Washington, DC)
• Azabu (Miami, FL)
• Better Buzz Coffee Roasters (San Diego, CA)
• Blossom Bar (Boston, MA)
• Call (Denver, CO)
• Harlem Road Texas BBQ (Houston, TX)
• Interio (Austin, TX)
• Kaya (San Francisco, CA)
• Majordomo (Los Angeles, CA)
• Miznon (New York, NY)
• Salt & Straw (Seattle, WA)
• Snackboxe Bistro (Atlanta, GA)
• Suraya (Philadelphia, PA)
• Tapas Castile (Dallas, TX)
• The Warbler (Chicago, IL)
60

BREAKOUT BRANDS

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 2019
The following are the 2019 Breakout Brands:

- Cauldron Ice Cream
- Choice Market
- Clover Food Lab
- Homestate
- Hot Chicken Takeover
- Ippudo

60.3 Recent Designations
The following are recently designated Breakout Brands:

2018
- Cane Rosso
- Curry Up Now
- Maria Empanada
- Snowdays
- Souvla
- Tacos Tequila Whiskey
- Taïm
- Zaytinya

2017
- East Hampton Sandwich Co.
- Holler & Dash
- Ruby Slipper Cafe
- Salt & Straw
- Starbird
- Tacodeli
- The Crab Shack
- The Tati Roll Company

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 2018

The 2018 Future 50 are as follows:

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>Sales</th>
<th>Growth</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>CoreLife Eatery:</td>
<td>$22 million</td>
<td>241.4%</td>
<td>23</td>
</tr>
<tr>
<td>The Halal Guys:</td>
<td>$37 million</td>
<td>160.0%</td>
<td>54</td>
</tr>
<tr>
<td>Wahlburgers:</td>
<td>$30 million</td>
<td>122.5%</td>
<td>20</td>
</tr>
<tr>
<td>Maple Street Biscuit Co.:</td>
<td>$28 million</td>
<td>96.6%</td>
<td>20</td>
</tr>
<tr>
<td>Honeygrow:</td>
<td>$39 million</td>
<td>96.0%</td>
<td>26</td>
</tr>
<tr>
<td>Bibibop Asian Grill:</td>
<td>$23 million</td>
<td>89.4%</td>
<td>25</td>
</tr>
<tr>
<td>Babalu Tapas &amp; Tacos:</td>
<td>$25 million</td>
<td>78.6%</td>
<td>9</td>
</tr>
<tr>
<td>Cava:</td>
<td>$47 million</td>
<td>77.2%</td>
<td>46</td>
</tr>
<tr>
<td>Ahipokoi bowl:</td>
<td>$26 million</td>
<td>74.0%</td>
<td>24</td>
</tr>
<tr>
<td>Duck Donuts:</td>
<td>$24 million</td>
<td>72.9%</td>
<td>58</td>
</tr>
<tr>
<td>1000 Degrees Neapolitan Pizza:</td>
<td>$26 million</td>
<td>66.7%</td>
<td>34</td>
</tr>
<tr>
<td>Dog Haus:</td>
<td>$24 million</td>
<td>58.2%</td>
<td>31</td>
</tr>
<tr>
<td>Your Pie:</td>
<td>$27 million</td>
<td>58.0%</td>
<td>47</td>
</tr>
<tr>
<td>Naf Naf Grill:</td>
<td>$48 million</td>
<td>58.0%</td>
<td>38</td>
</tr>
<tr>
<td>Kura Revolving Sushi Bar:</td>
<td>$37 million</td>
<td>57.8%</td>
<td>14</td>
</tr>
<tr>
<td>R Taco:</td>
<td>$24 million</td>
<td>55.4%</td>
<td>26</td>
</tr>
<tr>
<td>The Simple Greek:</td>
<td>$21 million</td>
<td>55.1%</td>
<td>15</td>
</tr>
<tr>
<td>Famous Toastery:</td>
<td>$30 million</td>
<td>53.7%</td>
<td>25</td>
</tr>
<tr>
<td>The Lost Cajun:</td>
<td>$25 million</td>
<td>53.6%</td>
<td>12</td>
</tr>
<tr>
<td>HopCat:</td>
<td>$48 million</td>
<td>48.9%</td>
<td>16</td>
</tr>
<tr>
<td>Bombshells:</td>
<td>$22 million</td>
<td>46.7%</td>
<td>6</td>
</tr>
<tr>
<td>&amp;pizza:</td>
<td>$29 million</td>
<td>42.8%</td>
<td>26</td>
</tr>
<tr>
<td>Teriyaki Madness:</td>
<td>$29 million</td>
<td>42.0%</td>
<td>42</td>
</tr>
<tr>
<td>LA Crawfish:</td>
<td>$31 million</td>
<td>41.7%</td>
<td>19</td>
</tr>
<tr>
<td>Vitality Bowls:</td>
<td>$45 million</td>
<td>41.4%</td>
<td>48</td>
</tr>
<tr>
<td>Gus’s World Famous Fried Chicken:</td>
<td>$47 million</td>
<td>40.1%</td>
<td>24</td>
</tr>
</tbody>
</table>
• California Fish Grill: $47 million  39.7%  21
• Punch Bowl Social: $28 million  39.6%  11
• B.Good: $50 million  38.9%  53
• Luna Grill: $48 million  38.1%  40
• Yolk: $29 million  36.4%  13
• Burger Lounge: $39 million  35.8%  25
• Snooze, an A.M. Eatery: $39 million  35.8%  24
• Hopdoddy Burger Bar: $49 million  35.8%  22
• Ike’s Place: $33 million  35.7%  38
• Melt Bar & Grilled: $21 million  35.0%  13
• Tin Lizzy’s Cantina: $41 million  34.4%  17
• Blue Bottle Coffee: $27 million  34.3%  40
• Keke’s Breakfast Cafe: $47 million  33.7%  32
• Luke’s Lobster: $36 million  33.7%  30
• Pies & Pints: $40 million  33.0%  14
• Dig Inn: $30 million  32.6%  19
• Clean Eatz: $24 million  32.2%  31
• Philz Coffee: $21 million  31.3%  42
• Urban Cookhouse: $22 million  30.8%  13
• Grabbagreen: $25 million  29.6%  27
• Piada Italian Street Food: $40 million  29.4%  42
• Bakersfield: $27 million  28.6%  8
• Burger & Beer Joint: $20 million  28.1%  8
• Even Stevens Sandwiches: $23 million  27.6%  21

Previous lists are available at www.restaurantbusinessonline.com/future-50.

61.3 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)
HOT CONCEPTS

62.1 Hot Concept Awards
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.

“For 25 years, the awards have celebrated emerging brands that are tapping into the right trends. Past winners have gone on to have substantial impact on the restaurant industry, including Smashburger, True Food Kitchen, Pokéworks, The Little Beet, and Shake Shack.”

Nation’s Restaurant News, 7/22/19

62.2 Recent Designations
Restaurant brands selected for Hot Concept Awards have been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Brands</th>
</tr>
</thead>
</table>
| 2019 | &pizza  
Garden Bar  
Maple Street Biscuit Company  
Mulberry & Vine  
The Crack Shack |
| 2018 | Beefsteak  
Breakfast Republic  
Holler & Dash  
Pokéworks  
Punch Bowl Social |
| 2017 | Bibipop Asian Grill  
Bubba’s 33  
Flower Child  
New Bohemia  
Public School on Tap |
| 2016 | Honeygrow  
Naf Naf Grill  
Nekter Juice Bar  
The Little Beet  
Velvet Taco |
2015
• Bareburger
• Cava Mezze Grill
• Eureka!
• Tortas Fronteria
• Noon Mediterranean [Verts]

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

TOP NEWCOMERS

63.1 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.

63.2 Newcomers List 2019

The following were newcomers on Technomic’s June 2019 list:

<table>
<thead>
<tr>
<th>Rank</th>
<th>Sales</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>#419</td>
<td>$62.4 million</td>
<td>40</td>
</tr>
<tr>
<td>#425</td>
<td>$61.9 million</td>
<td>24</td>
</tr>
<tr>
<td>#442</td>
<td>$58.9 million</td>
<td>77</td>
</tr>
<tr>
<td>#445</td>
<td>$58.6 million</td>
<td>6</td>
</tr>
<tr>
<td>#454</td>
<td>$57.5 million</td>
<td>165</td>
</tr>
<tr>
<td>#455</td>
<td>$57.2 million</td>
<td>26</td>
</tr>
<tr>
<td>#471</td>
<td>$53.7 million</td>
<td>68</td>
</tr>
<tr>
<td>#479</td>
<td>$52.6 million</td>
<td>49</td>
</tr>
<tr>
<td>#485</td>
<td>$51.7 million</td>
<td>17</td>
</tr>
<tr>
<td>#486</td>
<td>$51.5 million</td>
<td>32</td>
</tr>
<tr>
<td>#487</td>
<td>$51.5 million</td>
<td>61</td>
</tr>
<tr>
<td>#491</td>
<td>$50.8 million</td>
<td>9</td>
</tr>
<tr>
<td>#493</td>
<td>$50.4 million</td>
<td>64</td>
</tr>
<tr>
<td>#494</td>
<td>$50.3 million</td>
<td>31</td>
</tr>
<tr>
<td>#495</td>
<td>$50.0 million</td>
<td>14</td>
</tr>
<tr>
<td>#496</td>
<td>$49.5 million</td>
<td>24</td>
</tr>
<tr>
<td>#497</td>
<td>$49.4 million</td>
<td>26</td>
</tr>
<tr>
<td>#498</td>
<td>$49.2 million</td>
<td>39</td>
</tr>
<tr>
<td>#499</td>
<td>$48.9 million</td>
<td>18</td>
</tr>
<tr>
<td>#500</td>
<td>$48.7 million</td>
<td>20</td>
</tr>
</tbody>
</table>

63.3 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)
PART IX: DINING TRENDS & ANALYSES
64

CANNABIS/CBD-INFUSED FOOD & DRINKS

64.1 Overview

*2019 Culinary Forecast*, by the National Restaurant Association (NRA, www.restaurant.org) based on a survey of over 1,200 member chefs of the American Culinary Federation, ranked cannabis/CBD-infused drinks as the #1 menu trends for 2019; cannabis/CBD-infused food ranked #2.

CBD oil (cannabidiol) is a naturally occurring component of cannabis, said to have many properties that aide in relaxation and anti-inflammation without the psychoactive properties of the better-known cannabis compound, THC (delta-9-tetrahydrocannabinol). The compound is being used in an FDA-approved drug to treat epilepsy. It has also been appearing on more and more restaurant menus, often at hip fine-dining restaurants as well as in packaged food products.

64.2 Regulatory Status

In December 2018, the U.S. Food and Drug Administration added a new category to their cannabis class designation called “hemp,” officially defined as “cannabis and cannabis derivatives with extremely low (no more than 0.3% on a dry weight basis) concentrations of THC. However, hemp products have not yet been approved as a safe food additive. The legality of CBD-infused products remains in limbo.

_________________________________________________________________

“For restaurant and bar owners selling edible or drinkable hemp and CBD products, it could be several years until they can legally take advantage of the cannabis additive industry, which was named one of the most popular food trend predictions in 2019.”

*Nation’s Restaurant News, 4/11/19*
The first public hearing on CBD-infused food and beverages was held in May 2019. After the hearing, the FDA formed a working group to address concerns of food safety and explore potential pathways for commercial CBD products to be safely distributed. According to former FDA commissioner Scott Gottlieb, the process to promulgate a formal regulation related to CBD-infused food and beverages will likely take until 2022 or beyond.

64.3 CBD-Infused Items On Restaurant Menus

The uncertainty about CBD legality has not stopped a growing number of restaurants from introducing CBD-infused menu items.

Many independent operators across the U.S. have begun offering CBD-infused menu items but restaurant chains, for the most part, are not adding such products to their menus until the regulatory status is made clear.

In early 2019, Carl’s Jr. debuted at one outlet in Denver the Rocky Mountain High CheeseBurger Delight, which combines CBD with a classic fast-food meat sandwich.

In April 2019, Fresh&Co, an 18-unit fast-casual New York restaurant chain with a health-oriented, vegetable-forward menu, debuted a limited-time cannabidiol-infused menu. The menu featuring a number of cannabinoid (or CBD) oil-infused food and beverage items.

The James New York NoMad hotel offers a CBD-infused room service menu. The Ace Hotel (New York, NY) has two CBD oil-infused offerings in the Lobby Bar.

Denver-based Illegal Burger, offers both burgers and a CBD-infused burger bowl. The use of CBD as a food additive is legal in Colorado, according to state regulations.

Monarch and the Milkweed (Burlington, VT) has collaborated with Hen of the Wood restaurant to offer Little Chocolate Smoke Toke, an Applewood smoked crunchy praline and cinnamon-filled dark chocolate truffle that has 50 mg of CBD.
65.1 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 2018 survey by the Global Business Travel Association (GBTA, www.gbta.org), business travelers eat at the following types of restaurants:

- Upscale-casual: 64
- Fast-casual: 52
- Quick-service: 34
- Family-dining: 29

Dining-related smartphone use by business travelers is as follows:

- Have dining apps on their phone: 63%
- In the last year, have used their device to search for local places to eat: 54%
- In the last year, have used their device to make a reservation: 47%
- In the last year, have searched social media for restaurant information: 33%

The GBTA survey found that Millennials are more likely to dine on the go, while Baby Boomers are more likely to dine with clients. Gen Xers tend to dine in groups with colleagues.

“When it comes to business travel, there are clear generational differences.”

Global Business Travel Association, 10/18

When asked about travel policies for meal expenses, 71% of respondents said client meals, 56% said group meals, and 46% said alcoholic beverages were allowed. Additionally, 72% said they pay for meals with a corporate credit card.
65.2 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

65.3 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).

Charm City Food Tours (www.baltimorefoodtours.com) hosts culinary tours of four neighborhoods: Federal Hill, Fells Point, Little Italy/Jonestown, and Mount Vernon. Tours also visit Cross Street Market and Lexington Market.

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.
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.

### 65.4 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.

### 65.5 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 2018; 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.

### 65.6 Market Resources

Global Business Travel Association, 1101 King Street, Suite 500, Alexandria, VA 22314. (703) 684-0836. (www.gbta.org)

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)
66.1 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

In the highly competitive restaurant marketplace, theme restaurants must maintain high food quality as well as provide entertainment to be successful.

“If you’re a theme restaurant, then you should be a restaurant that happens to have a theme.”

Nation’s Restaurant News, 10/15/18

66.2 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 22 locations as of May 2019.

• 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)

### 66.3 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 were
127 locations as of May 2019.

- Dinner in the Sky (www.dinnerinthesky.com) hoists up to 22 guests on a platform 18 stories above the ground for dinner. The experience is offered in Las Vegas, New York City, and at Seminole Casino Coconut Creek (Florida), plus several cities in 31 countries. The concept has been expanded to include marriage in the sky, lounge in the sky, and showbiz in the sky.


- Medieval Times (www.medievaltimes.com) is a nine-unit chain with restaurants set inside a faux 11th century castle. Guests experience all of the feasting, pagentry, tournament games, and exciting sword fights that characterized the best of life a millennia ago. Locations are in Atlanta, Georgia; Buena Park, California; Dallas Texas; Chicago, Illinois; Hanover, Maryland; Kissimmee, Florida; Lyndhurst, New Jersey; Myrtle Beach, South Carolina; and Toronto, Ontario.

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

### 66.4 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 Dinner Train (Ft. Myers, FL; www.semigulf.com)
- Murder Mystery Train (Lansing, MI and Toledo, OH; www.murdermysterytrain.com)
- Mystery Cafe (Boston, MA; www.mysterycafe.com)
- Sleuths Mystery Dinner Show (Orlando, FL; www.sleuths.com)
- The Dinner Detective (65 locations as of May 2019; www.thedinnerdetective.com)

### 66.5 Dinner and a Movie

Attendance at movie cinemas has been on the decline since 2002, largely because of increased competition from digital downloads and video on demand; combined with increasingly theater-like home-entertainment technology. Hoping to lure moviegoers back to the cinema, several new ventures have put a 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) had 16 locations as of May 2019, in Arizona, Georgia, Illinois, North Carolina, Ohio, and Texas.

### 66.6 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 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. The restaurant, which opened in 1966, recently opened a location in Chicago and plans national expansion.

66.7 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. As of May 2019, Landry’s operated 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 had 608 locations as of May 2019.

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

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).
- Garage (Seattle, www.garagebilliards.com) is located in a cavernous old auto repair shop. The restaurant includes a billiards hall and bowling alley.
- Heart Attack Grill (Las Vegas, NV; 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.locandany.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.

• 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.

• The Pandorica (www.thepandoricarestaurant.com) is a Doctor Who themed restaurant in Beacon, New York. Patrons can enjoy watching Doctor Who, a British science fiction television program produced by the BBC since 1963, whilst indulging in an eclectic menu of timeless comfort foods. The decor is filled with references to the show.

• Hello Kitty Cafe (www.sanrio.com/pages/hellokittycafe) opened in September 2018 in Irvine, California. The fast-casual concept has a pink private room and offers afternoon tea and cocktail service. The parent company, Sanrio, also operates Hello Kitty food trucks.
67

DOG-FRIENDLY RESTAURANTS

67.1 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 $72 billion in 2018.

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.

In a 2018 survey by Upserve (www.upserve.com), 56% of respondents said that a restaurant being a family- and dog-friendly establishment was important or very important in their decision on where to dine out; 32% said it is one of the top three things they would consider when deciding to return.

67.2 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.

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


_________________________________________________________________

“Restaurants have become more welcoming to dogs in recent years, inviting them to dine on patios with human companions in many cities.”

Nation’s Restaurant News, 3/18/19

_________________________________________________________________
67.3 Hybrid Dog Park/Restaurants
Several restaurants have opened specifically designed to cater to dogs. Dogs can play off-leash in a supervised park while their owners can eat or drink with their pet or in a separate area. Most are membership-based and serve alcoholic beverages.

“A lot of times, dog people want to hang out with dog lovers. This gives people an opportunity to sit back and unwind with a beer and play with their dog at the same time.”

Nation’s Restaurant News, 3/18/19

The following are some hybrid dog park/restaurants
• Bangers Sausage House and Beer Garden (Austin, TX)
• Bar K (Kansas City, MO)
• Doghouse Drinkery (Leander, TX)
• Mutts Canine Cantina (Dallas, TX)
• The Watering Bowl (Denver, CO)
• Yard Bar (Austin, TX)

67.4 Dog Menus
A bowl of water and sometimes complimentary treats have 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 Pooch Patio Menu that includes House Made Beef and Rice in Savory Gravy ($8) and Hungry Dawg Grilled and Sliced Sirloin ($8).
• Dairy Queen offers the Pup Cup, a cup of vanilla soft serve ice cream.
• Harbor Fish Market & Grille (Baileys Harbor, WI) offers special canine menu items such as scrambled eggs, chicken breast, and frozen custard ($2.50 to $3.95).
• In-N-Out Burger offers the Pup Patty, a regular hamburger, no salt, minus the bun.
• Shake Shack has what it calls “treats for those with four feet.” The dog-friendly menu includes a bag of bone-shaped treats ($7.50) and an ice cream treat called Pooch-ini (vanilla custard, peanut butter sauce and doggie bones; $3).
• Starbucks offers the Pupaccino, a complimentary cup of whipped cream for patrons’ dog.
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.

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

Pet Business, 450 Park Avenue South, 10th Floor, New York, NY 10016. (212) 979-4800. (www.petbusiness.com)
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FOOD & WINE FESTIVALS

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

68.2 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.

Travel Channel rated the following as the best food festivals in 2019:
• Charleston Wine & Food Festival
• Epcot International Food & Wine Festival
• Hawaii Food & Wine Festival
• Key West Wine & Food Festival
• Los Angeles Food & Wine Festival
• New Orleans Wine & Food Experience
• San Diego Bay Wine & Food Festival
• South Beach Food & Wine Festival
• Taste of Chicago
• Taste of Vail

One of the grandest food festivals is three-day The Food & Wine Classic (www.foodandwine.com/classic), held in Aspen, Colorado, which celebrated its 38th year in 2019. 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 18th year, the 2019 festival was held February 20-24. 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.
68.3 Market Resources
Directories of food festivals are available online at the following websites:
• www.festivals.com/search/tag/food-wine-beer-festivals/
• www.foodreference.com/html/upcomingfoodevents.html
69

FOOD SAFETY

69.1 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

The extent of food-borne illnesses associated with restaurant dining is difficult to ascertain without determining the exact cause or when symptoms occur. A 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

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.
69.2 Consumer Response To Food Safety
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% 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.

69.3 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.

69.4 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)
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HEALTHY DINING

70.1 Healthful Dining

Restaurant operators continue to emphasize healthier fare as 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>
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<tr>
<td>Female:</td>
<td>68%</td>
<td>72%</td>
</tr>
<tr>
<td>Male:</td>
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<td>57%</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Age</th>
<th>FSR</th>
<th>LSR</th>
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<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 required to post on their menus and drive-through signs calorie counts and information about how many calories a healthy person should eat daily.

In a 2018 survey by The NPD Group, adults said they were trying to cut back or avoid the following food elements (percentage of respondents):

- Sugar: 71%
- Fat: 64%
- Sodium: 64%
- Cholesterol: 62%
- Trans Fats: 60%
- High-fructose corn syrup: 61%
- Calories: 60%
- Carbohydrates: 58%

70.2 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.

### 70.3 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](http://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.

A November 2018 survey by Pew Research Center ([www.pewresearch.org](http://www.pewresearch.org)) found the following opinions regarding the overall health risk from food additives:

- Pose a serious risk to health: 51%
- They are in such small amounts that they do not pose a serious health risk: 48%
- No opinion: 1%

________________________________________

“The American public is closely divided over the degree of health risk posed by additives in the foods we regularly eat.”

Pew Research Center, 11/19/18
70.4 Genetically Modified Foods

The NPD Group found that 66% of adults are aware of genetically modified foods, and 57% of adults say that they are concerned about GMOs.

In a November 2018 survey by Pew Research Center (www.pewresearch.org), respondents expressed the following opinions about genetically modified foods:

- Worse for one’s health than foods with no GMO ingredient: 49%
- Neither better nor worse: 44%
- Better: 5%
- No opinion: 1%

“What do Americans think about GMOs? About half think they’re unhealthy; the other half aren’t especially concerned.”

The New York Times, 12/6/18

70.5 Sugar Consumption

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

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

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

The typical U.S. diet exceeds all of these guidelines. The Centers for Disease Control and Prevention (www.cdc.gov) estimates that 13% of adults' total caloric intake comes from sugar.

The American Heart Association recommends limiting sugar consumption to 37.5 grams for men and 25.0 grams for women. According to the USDA Economic Research Service (www.ers.usda.gov), the average American adult consumes 78.2 grams of sugar daily, distributed by source as follows:

- Food at home: 54.8 grams
- School and other sources: 7.4 grams
- Take-out and fast food: 6.4 grams
- Sit-down restaurants: 4.2 grams
In a 2018 survey by The NPD Group, 71% of adults reported trying to cut back on sugar.

70.6 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.

70.7 Dieting

An assessment by The NPD Group found a long-term decline in dieting among American adults. Nineteen percent (19%) of adults report dieting in the past year, 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%
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

70.8 Portion Control

Scaled-down entrées – particularly small sandwiches and burgers – have caught on across all restaurant industry segments. The shift to smaller menu items is, in part, attributed to restaurants’ awareness of the obesity issue in America and the relevance of portion size to this problem. A survey of 300 chefs, conducted by Julie Obbagy, Ph.D., a nutritionist at USDA’s Center for Nutrition Policy and Promotion, Evidence Analysis Division, found that most believe the amount of food served in restaurants influences how much people eat, and that big portions are hard on people watching their weight. Sixty-nine percent (69%) of chefs say that cutting portion size is a better way to reduce calories than to modify existing recipes.

Surveys by The NPD Group found that while a majority of consumers have intentions to eat healthier, many do not follow through. 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.
### 70.9 What Foods Are Healthy?

A survey by *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>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>

“Everybody eats – which is, of course, why food science stands out among scientific fields for its relevance to everyday citizens.”

*The New York Times, 12/6/18*
HOLIDAY DINING

71.1 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.

71.2 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.

71.3 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.

71.4 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:
71.5 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.

71.6 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.

71.7 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.

71.8 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; 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 dine out for a Thanksgiving meal and one in 20 get a full takeout meal to celebrate the holiday. Consumers also dine out while shopping on Black Friday.”

National Restaurant Association

_________________________________________________________________

71.9 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.

71.10 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.

### 71.11 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.
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LICENSING

72.1 Market Assessment

According to The Licensing Letter, annual retail sales of restaurant-branded licensed merchandise are approximately $5.2 million; the annual growth rate is about 4%.

72.2 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 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’
• Dunkin’ licensed coffee, marketed by Smucker’s, has annual retail sales of approximately $250 million, according to Nation’s Restaurant News. Dunkin’ 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*.
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LOCALLY SOURCED & ORGANIC FOOD

73.1 Local & Organic Preferences Among Consumers

In a 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></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>Gender</td>
<td></td>
<td></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>Age</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-to-34:</td>
<td>58%</td>
<td>58%</td>
</tr>
<tr>
<td>35-to-44:</td>
<td>68%</td>
<td>67%</td>
</tr>
<tr>
<td>45-to-54:</td>
<td>63%</td>
<td>63%</td>
</tr>
<tr>
<td>55-to-64:</td>
<td>67%</td>
<td>64%</td>
</tr>
<tr>
<td>65 and older:</td>
<td>68%</td>
<td>65%</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 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></th>
<th>Produce</th>
<th>Meat or Seafood</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fine-dining:</td>
<td>87%</td>
<td>75%</td>
</tr>
<tr>
<td>Casual-dining:</td>
<td>63%</td>
<td>55%</td>
</tr>
<tr>
<td>Family-dining:</td>
<td>63%</td>
<td>59%</td>
</tr>
</tbody>
</table>
The Generational Consumer Trend Report, by Technomic (www.technomic.com), reported the percentages of consumers 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 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

73.2 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.

73.3 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)
• Backwoods Crossing (Tallahassee, FL; www.backwoodscrossing.com)
• Blue Hill at Stone Barns (Pocantico Hills, NY; www.bluehillstonebarns.com)
• Celebrity Dairy (Silver City, NC; www.celebritydairy.com)
• Everett Family Farms (Soquel, CA; http://everettfamilyfarm.com)
• Flow at 14 Acre Farm (Jim Thorpe, PA; www.14acrefarm.com)
• Inn at Baldwin Creek (Bristol, VT; www.innatbaldwincreek.com)
• Gathering Together Farm (Philomoth, OR; www.gatheringtogetherfarm.com)
• Paradise Farms (Homestead, FL; www.paradisefarms.net)
• Patowmack Farms (Lovettsville, VA; www.patowmackfarm.com)
• Shelburne Farms (Shelburne, VT; www.shelburnefarms.org)
• The Loft at TradersPoint Creamery (Indianapolis, IN; www.traderspointcreamery.com)

Farmers Restaurant Group (www.farmersrestaurantgroup.com), founded by 47,000-member North Dakota Farmer’s Union (NDFU), operates seven restaurants, including a bakery, a creamery, and a distillery. The group operates Founding Farmers (Washington, DC; Potomac, MD; Tyson’s VA; King of Prussia, PA) and Farmers Fishers Bakers and Farmers & Distillers (Washington, DC).

“It’s one thing to tout farm-to-table as a way to support local farmers. But Farmers Restaurant Group in Washington, DC, thinks table-to-farm, with a model that sends more in profits back to family farmers. That’s the goal of the restaurant group, which was founded by NDFU, a grassroots organization created to support farmers, ranchers and rural communities.”

Restaurant Hospitality, 1/19

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.
73.4 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.lyfekitchen.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)
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LOYALTY PROGRAMS

74.1 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.

“As loyalty programs move from a novelty to a given, restaurants are rethinking their rewards platforms to be more personalized, customizable – and simply more fun – to grab consumers’ limited attention.”

Nation’s Restaurant News, 4/15/19

74.2 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.

Among the 50 largest restaurant chains, 78% have loyalty programs.

“The competition for customer loyalty is fierce. Among the 50 largest restaurant chains, 39 have digital rewards programs.”

Nation’s Restaurant News, 4/15/19
A survey of restaurant owners and managers by LivingSocial (www.livingsocial.com) found that one-third offered a loyalty program.

### 74.3 Customer Participation

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.

### 74.4 Restaurant Loyalty Programs

The following are profiles of select loyalty programs (source: Nation’s Restaurant News):

**Dunkin’**

- **Program:** DD Perks
- **Platform:** loyalty card, mobile application
- **Perks Offered:** five points for ever $1 spent, with 200 points earning a free medium beverage; personalized offers based on previous orders
- **Launch date:** 2014 nationwide
- **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: 2017
• Number of Members: undisclosed

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: 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: 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: 2009, with merge of Starbucks and Starbucks Gold into one platform
• Number of Members: more than 16 million
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MEAL KITS

75.1 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. Generally sold online as a subscription service, orders are placed digitally and delivered directly to the customer.

According to an April 2019 survey by Nielsen (www.nielsen.com), 12% of adults had purchased a meal kit in the past six months; 23% did not buy one but would consider doing so.

The NPD Group (www.npd.com) found that 93 million adults who have never tried a meal kit are interested in trying one.

According to Acosta Sales & Marketing (www.acosta.com), adults that have purchased meal kits, by generation, are as follows:

• Millennials (ages 18-to-36): 60%
• Generation Xers (ages 37-to-52): 31%
• Baby Boomers (ages 53-to-71): 10%
• Seniors (ages 72 and older): 4%

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.

75.2 Market Assessment

Packaged Facts (www.packagedfacts.com) assessed the U.S. meal kit market as follows:

• 2017: $2.55 billion
• 2018: $3.10 billion
• 2019: $3.70 billion
• 2020: $4.30 billion
• 2021: $4.85 billion
• 2022: $5.20 billion
• 2023: $5.50 billion
75.3 Key Players

According to Inc., there are over 150 meal kit companies in the United States. 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.

Supermarkets and restaurants followed online companies into the meal kit market. Nielsen reported that meal kit in-store purchases accounted for 60% of growth in sales in 2018.

“The meal kit market is quickly evolving from nearly exclusively online and subscription-based, home delivery services to on-demand availability in-store and online. Over a quarter of recent users purchasing kits both in-store, including restaurants, and online.”

The NPD Group, 3/13/19

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.
PLANT-BASED PROTEIN

76.1 Overview
Plant-based food products that replicate the taste and texture of meat, which have been around for many years, have become quite popular on restaurant menus. Chefs of the American Culinary Federation (www.acfchefs.org) ranked them as one of the top menu trends for 2019 in the 2019 Culinary Forecast.

“The fact is that plant-based dining is now solidly in the mainstream. A growing number of carnivores believe its better for the planet to reduce their meat intake and the options on restaurant menus that help them do that are getting better and better.”

Restaurant Hospitality, 10/18

According to Mintel (www.mintel.com), 35% of adults get most of their protein from sources other than red meat. Thirty-one percent (31%) practice meat-free days. A 2019 study by The NPD Group (www.npd.com) found that about 25% of U.S. adults consume plant-based proteins. Shipments of the proteins to foodservice operators increased 20% in 2018.

76.2 Key Players
Two companies, Beyond Meat (www.beyondmeat.com) and Impossible Foods (www.impossiblefoods.com), have captured consumer attention. Beyond Meat has positioned itself as the gluten- and soy-free alternative without genetically modified ingredients. In addition to burgers, the company supplies seasoned “beef” crumbles, grilled faux-chicken strips, and sausage that resembles pork. At year-end 2018, Beyond Meat products were on more than 11,000 menus in
the U.S. Including retail stores, the company boasted more than 32,000 outlets. Impossible Foods blends the plant-derived molecule heme, which is what makes meat taste like meat, according to the company. Impossible burgers were offered at more than 3,000 restaurants at year-end 2018.

In June 2019, Tyson Foods introduced its Raised & Rooted brand, which includes both plant-based and blended protein products that feature both meat and plants.

Nestlé sells the Awesome Burger under its Sweet Earth Brand. Other plant-based protein suppliers include Gardien (www.gardien.com), Hungry Planet (www.hungryplanet.com), and Morningstar Farms (www.morningstarfarms.com).

76.3 Burgers

According to The NPD Group, 44% of the plant-based food shipped to independent and small chain restaurants is beef alternatives. Most of that is in the form of burgers.

White Castle was the first major fast-food chain to offer the Impossible Burger as a regular menu item.

In 2018, Bareburger, known mostly for burgers with meat, began offering both the Impossible Burger and Beyond Burger on their menu.

In January 2019, Carl’s Jr. added the plant-based Beyond Burger to its menu.

In March 2019, Red Robin became the largest restaurant chain to serve The Impossible Burger and Burger King announced the pilot of the Impossible Whopper.

76.4 Other Menu Items

Several foodservice suppliers have introduced plant-based protein items to their product lines. Plant-based alternatives to eggs, for instance, are sold by Clover Food Lab, and Just Inc. Hungry Planet sells plant-based crab cakes and fish as well as non-meat alternatives to chicken, chorizo, Italian sausage, and pork.

“More than just burgers... other plant-based categories are on the rise.”

Restaurant Hospitality, 10/18

The following are some restaurants that offer plant-based protein menu items:

• Chipotle Mexican Grill was the first major chain to offer a vegan option when in 2014 it introduced its Sofritas, a spicy, shredded organic tofu, to restaurants nationwide.
• In March 2019, Blaze Pizza introduced a vegan Spicy Chorizo topping at its 300-plus restaurants nationwide.
• In April 2019, Del Taco became the first national Mexican fast-food chain to offer plant-based meat across all 580 locations when it introduced two meatless tacos: Beyond Taco and Beyond Avocado Taco.
• Bagel chains Einstein Bros., Noah’s New York Bagels, and Bruegger’s Bagels offer Daiya’s dairy-free Plain Cream Cheeze-Style Spread at restaurants nationwide.

Copper Branch, a Montreal-based fast-casual chain with an entirely plant-based menu, launched in the U.S. in 2019.

76.5 Market Resources
Plant Based Foods Association, 4 Embarcadero Center, Suite 1400, San Francisco, CA 94111. (415) 236-5048. (www.plantbasedfoods.org)
RESTRICTIVE DIET MENUS

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

77.2 Gluten-Free Menu Items
The National Restaurant Association (www.restaurant.org) surveys member chefs of the American Culinary Federation (www.acfchefs.org) annually asking them to rank over 200 culinary items. Gluten-free cuisine ranked in the top five trends.

Mintel estimates sales of gluten-free foods and beverages (both packaged and served in restaurants) at $15.6 billion, an increase from $10.5 billion in 2010.

The percentage of customers by age who eat gluten-free is as follows:
- Ages 18-34: 31%
- Ages 35-49: 27%
- Ages 50-64: 25%
- Ages 65 and older: 17%

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

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

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
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).

Deli remain the most popular format for Jewish cuisine. The following are some of the top Jewish delis in the U.S. (sources: Food & Wine, Foursquare, The Daily Meal):

• 2nd Ave Deli (New York, NY)
• Attman’s Deli (Baltimore, MD)
• 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)
• Hobby’s Deli (Newark, 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)
• Liebman’s Deli (New York, NY)
• 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)
• Sarge’s (New York, NY)
• 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)

77.4 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 at $2.0 billion, a 15% increase from 2012.

77.5 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.

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.

Gallup (www.gallup.com) found the number of people who identify themselves as vegetarian has remained steady at about 5% since 1999. By age, those that are vegetarian or vegan are as follows:

**Vegetarian**
- 18-to-29: 7%
- 30-to-49: 8%
- 50-to-64: 3%
- 65 and older: 2%

**Vegan**
- 18-to-29: 3%
- 30-to-49: 4%
- 50-to-64: 1%
- 65 and older: 3%

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 following are some of the top vegan and vegetarian restaurants in the United States (sources: The Daily Meal and Thrillist):
- Blossoming Lotus (Portland, OR)
- Bouldin Creek Cafe (Austin, TX)
- Bulan Thai (Los Angeles, CA)
- Bunna Cafe (Brooklyn, NY)
- By Chloe (New York, NY)
- Crossroads Kitchen (Los Angeles, CA)
- Elizabeth's Gone Raw (Washington, DC)
- Fancy Radish (Washington, DC)
- G-Zen (Bradford, CT)
- Gracias Madre (San Francisco, CA)
- Greens (San Francisco, CA)
- Ground Control (Chicago, IL)
- Homegrown Smoker (Portland, OR)
- J. Selby's (Saint Paul, MN)
- JaJaJa Plantas Mexicana (New York, NY)
- Kindred (San Diego, CA)
- Leaf (Boulder, CO)
• Little Pine (Los Angeles, CA)
• Modern Love (Omaha, NE and Brooklyn, NY)
• Natural Selection (Portland, OR)
• Plant (Asheville, NC)
• Plant Food + Wine (Miami, FL and Venice, CA)
• Plum Bistro (Seattle, WA)
• Red Lentil (Watertown, MA)
• Seva (Ann Arbor, MI)
• Superiority Burger (New York, NY)
• V Street (Philadelphia, PA)
• Vedge (Philadelphia, PA)
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SUSTAINABILITY

78.1 Overview
A restaurant's sustainability effort can influence guests' restaurant choices. About half of consumers say that a restaurant's efforts to recycle, donate food or reduce food waste can be factors in where they choose to dine.

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 restaurant trends. Environmental sustainability has been among the top three trends since 2013.

Environmental sustainability in restaurant operations has four key elements:
- Energy efficiency
- Recycling and packaging
- Minimize food waste
- Sustainable menu items

78.2 Energy Efficiency
A 2018 survey by the National Restaurant Association found the following energy efficiency activities among restauranteurs:
- Eighty percent (80%) of restaurant operators use energy-efficient lighting.
- Sixty percent (60%) use programmable thermostats.
- More than 40% use Energy Star-rated refrigerators, freezers and icemakers.
- Twenty-five percent (25%) use Energy Star dishwashers and 22% use Energy Star fryers.
- Sixty percent (60%) of restaurant kitchens use start-up/shut-down schedules to reduce the energy drain of kitchen equipment.

Restaurants can be certified at multiple levels by various independent organizations. The Green Restaurant Association (www.dinegreen.com) awards points for use of Energy Star equipment. The U.S. Green Building Council (www.usgbc.org) certifies energy efficient restaurants through its LEED (Leadership in Energy and Environmental Design) green building rating system.

The Food Service Technology Center (www.fishnick.com) provides guidance for restaurants in reducing energy consumption.
Restaurants can reduce operations costs as well as protect the environment by implementing energy management practices.

"While the upfront cost may be daunting, efficient equipment will pay for itself within 36 months and can help drive savings between 10% and 20%.”

Nation’s Restaurant News, 2/4/19

78.3 Recycling And Packaging

According to the National Restaurant Association, 72% of restaurant of operators buy some packaging and supplies that contain recyclable material. Fifty-six percent (56%) buy supplies certified as compostable.

Independent operators reported higher rates of recycling than restaurant chains or franchises.

Initiatives have been launched to cut the use of disposable takeaway food packaging by providing customers with reusable containers. The following are two examples:

• In North Carolina, more than 30 restaurants coordinate through Don’t Waste Durham (www.dontwastedurham.org) to provide consumers with containers that can be washed and reused more than 500 times. Participating customers drop off containers in bins around the city where they are picked up, taken to a commercial kitchen to be washed and sanitized, and redistributed to restaurants. Customers pay $25 a year to participate; there is no cost to restaurants.

• In Portland, Oregon, GO Box has more than 70 restaurants participating in a reusable food container program. More than 150,000 single-use containers have been saved from the waste stream since the programs launch in 2015. Customers are charged $18 a year and restaurants pay a 20¢ fee for each transaction. GO Box expanded to San Francisco in 2019 and has plans to franchise in other cities.

The National Park Services (www.nps.gov) estimates that 500 million straws are used every day in the United States, causing significant pollution in waterways and oceans. In July 2018, Seattle, Washington, became the largest U.S. city to ban plastic straws. A ban on plastic straws in restaurants and other service businesses began in January 2019 in Washington, DC. Several restaurant chains have announced plans to phase out use of plastic straws. McDonald’s eliminated use of plastic straws at some locations in 2018. Starbucks plans to phase out plastic straws by 2020. Bon Appétit
Management, a food service company with 1,000 U.S. locations, announced last May it will phase out plastic straws.

78.4 Reducing Food Waste

Food in landfills decomposes and produces methane gas, a significant contributor to climate change. Landfills are responsible for a third of all methane emissions in the U.S., according to the Environmental Protection Agency (www.epa.gov).

The National Resources Defense Council (www.nrdc.org) estimates that nearly 22% of disposed municipal solid waste is food.

The U.S. wastes an estimated 63 million tons of food per year, at a cost of about $218 billion annually. About 17% of food waste occurs at restaurants, amounting to about 11 million tons of food, or $25 million annually, according to the nonprofit Rethink Food Waste Through Economics and Data (ReFED, www.refed.com).

Fifty-five percent (55%) of restaurant operators track the amount of food waste their restaurant generates and make efforts to reduce food waste.

Twenty percent (20%) of operators donate leftover food to charities. However, concerns over liability hamper some would-be donators: More than half of those who don’t donate leftover food cite liability.

More than 10% of restaurant operators compost food waste. Approximately 500 composting facilities across the country offer a diversion of food from landfills to create nutrient-rich compost. Another 40 to 50 anaerobic digester composting facilities not only divert food waste from landfills by turning it into usable compost and liquid fertilizer for local farms, but also capture the methane gas that is produced, using it for energy.

78.5 Sustainable Menu Items

According to Technomic (www.technomic.com), 57% of adults say the use of sustainable foods is very important in creating a good value at restaurants.

_________________________________________________________________

“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

_________________________________________________________________
The following are some sustainable restaurant practices:

- Produce and other ingredients can be sourced locally from farmer’s markets or suppliers who buy from local, organic farmers. This cuts down on transportation costs and pollution, as well as ensuring that local farmers are supported.
- Menus can be synced with in-season produce. In-season produce is generally grown closer to where it’s sold, meaning less transportation impact and fresher food.
- Restaurants can start an onsite garden to provide a selection of homegrown ingredients at all times.
- Meat can be sourced from local, organic farmers who allow their cattle and poultry to be free-range. Beef can be grass-fed and poultry pasteurized. On average it takes about 1,800 gallons of water to harvest a single pound of meat, and the meat industry is responsible for around one-fifth of the man-made greenhouse gasses which are directly contributing to climate change. Smaller meat portions can make menus more sustainable.
- Many restaurants have implemented sustainable seafood practices (see section 26.11).
- Portion sizes can be reduced to minimize food waste. A smaller menu is also beneficial.

“In the case of a restaurant’s menu, less is truly more. It’s much better to do a handful of things exceptionally well as opposed to an encyclopedia of mediocre items.”

Restaurant Success, 5/19

Restauranteurs can also impact the food chain by helping protect bees, which play a critical role in the food system as pollinators of crops. Hundreds of chefs and restaurant operators have pledged to work to protect bees through the Bee Friendly Food Alliance (www.environmentamerica.org/programs/ame/bee-friendly-food-alliance).

78.6 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.

78.7 Market Resources
Green Restaurant Association, 89 South Street, Boston, MA 02111. (617) 737-3344. (www.dinegreen.com)


State of Restaurant Sustainability, National Restaurant Association. (www.restaurant.org/research/reports/state-of-restaurant-sustainability)
TAKEOUT & DELIVERY

79.1 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.

TechCrunch (www.techcrunch.com) estimated that the food takeout and delivery market represents about $70 billion in sales, with 13% coming from digital sales.

79.2 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></th>
<th>All Adults</th>
<th>Frequent Customers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>FSR</td>
</tr>
<tr>
<td>Delivery from a full-service restaurant:</td>
<td>55%</td>
<td>58%</td>
</tr>
<tr>
<td>Delivery from a quick-service restaurant:</td>
<td>52%</td>
<td>54%</td>
</tr>
<tr>
<td>Takeout from a full-service restaurant:</td>
<td>51%</td>
<td>53%</td>
</tr>
</tbody>
</table>

79.3 Trends In Takeout And Off-Premise Dining

According to the 2018 Takeout & Off-Premise Dining Consumer Trend Report, a biennial report by Technomic, consumers average 5.5 to-go (takeout or delivery) orders per month. Carryout orders outnumber delivery three-to-one.
Among regular takeout users (i.e., those who order at least once a month), 68% order takeout at least three to four times per month; 58% of their total foodservice orders are for carryout or delivery.

Thirty percent (30%) of adults say they typically purchase more food when ordering carryout or delivery than when dining in. By age, those that do so are as follows:
• 18-to-34: 43%
• 35 and older: 23%

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>Daypart</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:

- Don’t feel like eating in a restaurant: 47% 57%
- Don’t have time to sit and eat at a restaurant: 43% 33%
- Ordering food for others as well as self: 36% 33%
- Am by myself and don’t want to sit alone: 37% 28%
- Less expensive than dining in a restaurant: 28% 24%
- More casual than dining in a restaurant: 23% 26%

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:
• More places nearby offer food to-go: 37%
• It is now more a part of my routine: 37%
• More options available to-go now: 34%
• Have less time to cook at home: 33%
• My spending has increased in general: 29%
• More of my favorite places offer food to-go: 27%
• It is easier to order with new apps and to-go amenities: 22%
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>Convenience</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>
<tr>
<td>Separate order stations for to-go orders</td>
<td>42%</td>
<td>n/a</td>
</tr>
<tr>
<td>Order/prepay at an inside kiosk</td>
<td>28%</td>
<td>n/a</td>
</tr>
</tbody>
</table>

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.

### 79.4 Characteristics Of Restaurant Delivery

Delivery represents 3% of all restaurant orders. Delivery traffic by order method is as follows (source: The NPD Group):

- Telephone delivery: 49%
- Digital, delivery by restaurant: 31%
- Third-party app: 13%
- Other digital ordering: 7%

Alix Partners reports the frequency for use of delivery services among U.S. adults as follows:

- Daily: 3%
- Several times per week: 7%
- Once a week: 10%
- Several times per month: 12%
- Once a month: 12%
- Less than once a month: 56%
According to The NPD Group, the top five foods for delivery are as follows:

- Pizza
- Sandwiches
- Chinese/Asian/Indian
- Salad
- Chicken wings

“Food delivery, common in urban areas where population is dense and car ownership is low, is expanding to the suburbs and beyond thanks to the rise of digital services connecting users to restaurants. Diners used to have just pizza and Chinese to choose from, but now their options include fast food, higher-end fare, food carts and even virtual restaurants that serve as commissaries to fuel delivery orders rather than sit-down customers. Popular restaurants for delivery are even starting to reallocate space to accommodate staging areas and to make up for fewer in-store diners.”

eMarketer, 11/5/18

79.5 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.

Off-premise sales accounted for 13% of business for Olive Garden in 2018. CEO Gene Lee anticipates that figure to increase to 20% before plateauing.
79.6 Pizza Delivery

1010data (www.1010data.com) estimated that the three largest pizza chains garnered 41% of the entire U.S. delivery market. Marketshare is as follows:

- Domino’s: 15%
- Pizza Hut: 14%
- Papa Johns: 11%
- Other pizza chains: 4%
- Non-pizza restaurants: 55%

Pizza takeout and delivery are assessed in Sections 45.3 and 84.3 of this handbook.

79.7 App-Based Meal Delivery Services

App-based meal delivery services are assessed in Chapter 85 of this handbook.

79.8 Robotic Food Delivery

Starship Technologies (www.starship.xyz) has sold small self-driving robotic delivery vehicles for snack delivery to several Silicon Valley companies since 2015. In 2019, the company launched the first robotic meal delivery service at George Mason University with a fleet of 25 mini robots. Deliveries at the 800-acre campus are part of the meal plan service managed by Sodexo. Blaze Pizza, Dunkin’, and Starbucks participate in the program. Students order through an app and a bot, which looks like a white cooler on six wheels, makes the delivery. Delivery to any location on campus costs $1.99.

KiwiBot delivery service operates at University of California Berkeley. PepsiCo has tested a snackbot at the University of the Pacific.
80

UNDERGROUND DINING

80.1 Overview
An underground restaurant, often called a supper club, is a social dining restaurant operated out of someone's home or commercial space not generally open to the public. Generally bypassing local zoning and health-code regulations, they are usually advertised by word of mouth or online.

Websites such as BonAppetour help people find and book these restaurants. There are also mobile apps that facilitate peer-to-peer dining.

Many hosts are outstanding cooks who cannot, or simply do not care to, open a restaurant. And an increasing number of restaurant chefs are stepping out of their kitchens to re-ignite their passion for cooking at pop-up restaurants or other non-traditional spaces.

“By private invitations to pop-up restaurants or held al fresco in private homes, exclusive epicurean affairs have become the latest trend in fine dining. Food lovers are solving riddles, signing up to mailing lists, or anxiously waiting those last minute details to see if they will be one of the chosen few to dine with strangers from a one-of-a-kind menu. Many of these secret dining clubs were started by friends at their homes, or chefs in the back rooms of established restaurants. By word of mouth, various have grown to the point of having thousands on their mailing lists, yet room for only 30 to 40 people at each new gathering.”

Bon Appétit
The legality of underground is generally unclear.

“Once you start charging people, you cease to be a hobbyist, and you start becoming a commercial enterprise, even a small one. Regulators could potentially require liquor licenses and food-safety standards for meals arranged this way.”

Seth B. Weinberg, Adjunct Professor
Columbia Law School

80.2 Mobile Apps
Spurred by companies that promote the sharing model, like Airbnb and Uber, several companies have launched mobile apps to facilitate peer-to-peer dining, or social dining. The largest of these services are AirDine, EatWith, Feastly, and GrabAMeal. EatWith focuses on travelers, with meals in 200 cities. Feastly signs up professional chefs as hosts. The companies take a percentage of what hosts charge guests to attend, usually 15% to 20%. Hosts can set whatever price they like for guests; some AirDine hosts charge as little as $10 a head, while many EatWith and Feastly hosts charge $80 or more. The companies generally do not charge guests or hosts to join the platforms.

There are also numerous niche companies. VoulezVousDîner, for instance, lets travelers and other diners request hosted meals on specific days. And BonAppetour and VizEat offer food experiences, like market tours, along with meals.

Social dining has not yet caught on in the same way as peer-to-peer lodging (e.g. Airbnb) and car rides (e.g. Lyft and Uber). One reason is that the concept encounters some psychological barriers not seen in these other concepts.

80.3 Dinner Clubs
Dinner clubs are generally operated as a private group and require a membership. This helps avoid regulations that would apply to a commercial restaurant. Some dinner clubs have grown such that memberships and seats at functions are coveted. A few have expanded to operate in multiple cities.
The following dinner clubs host events across the country:

- A Razor/A Shiny Knife (www.arazorashinyknife.com)
- City Grit (www.facebook.com/citygrit/)
- Outstanding in the Field (hosts across the country; www.outstandinginthefield.com)
- Patrón’s Secret Dining Society (www.facebook.com/SecretDiningSociety/)
- Spring Street Social Society (hosts across the country; www.ssociety.com)

The following are some of the top private dinner clubs experiences (sources: Bon Appétit, Delish.com, Travel +Leisure, Venue Report):

- Clandestino Supper Club (Chicago, IL; www.clandestinosupperclub.com)
- Cook Here and Now (San Francisco, CA; www.cookhereandnow.com)
- Dai Due Austin (Austin, TX; www.daidue.com)
- Goose & Fox (Chicago, IL; https://goosefox.tumblr.com)
- Hush Supper Club (Washington, DC; www.hushsupperclub.com)
- I Forgot It’s Wednesday (New York, NY; www.wednesdays.nyc)
- Lazy Bear (San Francisco, CA; www.lazybearsf.com)
- Naked Kitchen (San Francisco, CA; www.nakedkitchensf.com)
- Oxalis (West Hollywood, CA; www.eatatoxalis.com)
- Plate & Pitchfork Farm Dinners (Portland, OR; www.plateandpitchfork.com)
- StudioFeast (New York, NY; www.studiofeast.com)
- Sunday Dinner Club (Chicago, IL; www.sundaydinner.com)
- The Roulette Society (West Hollywood, CA; www.facebook.com/TheRouletteSociety/)
- The Sunday Night Dinner (Astoria, NY; www.facebook.com/The-Sunday-Night-Dinner-In-Astoria-141916772529507/)
- Trois Mec (Los Angeles, CA; www.troismec.com)
- Txoko (Miami, FL; http://txokomiami.blogspot.com)
- Whaling Club (Los Angeles, CA; https://thewhalingclub.bigcartel.com)

### 80.4 Media Resources

While supper clubs remain private, many are not well-kept secrets. The following are recent media sources that have profiled underground dining in some major cities:

**Austin, TX**

- See Me, Feed Me, Read Me (https://seemefeedmereadme.com/2018/03/04/supper-clubs-in-austin-that-are-redefining-fine-dining/)

**Chicago, IL**

Miami and Fort Lauderdale, FL

New York, NY
• Thrillist (www.thrillist.com/eat/new-york/best-supper-clubs-in-nyc)

San Francisco, CA
• 7 x 7 (www.7x7.com/10-fabulous-underground-supper-clubs-in-sf-1787062470.html)
PART X: DINING & THE INTERNET
81

USE OF TECHNOLOGY

81.1 Restaurant Technology

*Mapping The Technology Landscape*, a 2019 report by the National Restaurant Association (www.restaurant.org), provides the following assessment of technology use by restaurants:

- Eighty-one percent (81%) of restaurants use a POS or electronic register system.
- Sixty-eight percent (68%) of restaurants offer wi-fi for guests.
- Fifty-three percent (53%) of restaurant operators say they would implement predictive ordering technology if it were available to them today.
- Thirty-seven percent (37%) of restaurant operators believe the most important area of technology development in the next five years is customer ordering.
- Thirty-seven percent (37%) of restaurants offer online ordering.
- Thirty-two percent (32%) of restaurant operators consider their operations to be lagging when it comes to technology use.
- Thirty-two percent (32%) of restaurants accept mobile payment.
- Twelve percent (12%) consider their operations to be leading-edge.

81.2 Technology Spending 2019

*State Of The Industry Report*, by the National Restaurant Association, reported restaurants increased technology spending in 2019 as follows (percentage of respondents):

**Casual Dining**
- Customer-facing service-based technology such as online or app ordering, reservations, mobile payment, or delivery management: 59%
- Back of the house technology such as point-of-sale, inventory, or table management: 44%
- Customer-facing technology devices or hardware such as tablets, tableside ordering systems, or ordering kiosks: 35%

**Family Dining**
- Customer-facing service-based technology such as online or app ordering, reservations, mobile payment, or delivery management: 53%
- Back of the house technology such as point-of-sale, inventory, or table management: 48%
- Customer-facing technology devices or hardware such as tablets, tableside ordering systems, or ordering kiosks: 33%

**Fast Casual**
- Customer-facing service-based technology such as online or app ordering, reservations, mobile payment, or delivery management: 62%
- Back of the house technology such as point-of-sale, inventory, or table management: 45%
- Customer-facing technology devices or hardware such as tablets, tableside ordering systems, or ordering kiosks: 35%

**Fine Dining**
- Customer-facing service-based technology such as online or app ordering, reservations, mobile payment, or delivery management: 49%
- Back of the house technology such as point-of-sale, inventory, or table management: 38%
- Customer-facing technology devices or hardware such as tablets, tableside ordering systems, or ordering kiosks: 28%

**Quick-Service**
- Customer-facing service-based technology such as online or app ordering, reservations, mobile payment, or delivery management: 70%
- Back of the house technology such as point-of-sale, inventory, or table management: 56%
- Customer-facing technology devices or hardware such as tablets, tableside ordering systems, or ordering kiosks: 41%

**81.3 Dining Experience Features**
A 2018 survey by Boston Retail Partners (www.brpconsulting.com) asked adults which restaurant technologies were important to enhance their dining experience. Restaurant operators were provided the same list of technologies and were asked which were well executed by their company. Responses were as follows:

<table>
<thead>
<tr>
<th>Important</th>
<th>Well-Executed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ease of ordering and payment:</td>
<td>71%</td>
</tr>
<tr>
<td>Discounts and promotions:</td>
<td>63%</td>
</tr>
<tr>
<td>Drive-thru availability:</td>
<td>56%</td>
</tr>
<tr>
<td>Wi-fi availability:</td>
<td>44%</td>
</tr>
<tr>
<td>New interactive tools and technology:</td>
<td>35%</td>
</tr>
<tr>
<td>Mobile/web order-ahead:</td>
<td>43%</td>
</tr>
<tr>
<td>Contactless/mobile payment availability:</td>
<td>32%</td>
</tr>
<tr>
<td>Curbside delivery:</td>
<td>29%</td>
</tr>
<tr>
<td>Interactive digital content:</td>
<td>29%</td>
</tr>
<tr>
<td>Ordering kiosk:</td>
<td>27%</td>
</tr>
</tbody>
</table>
“As in many industries, there is a gap between consumer expectations and business execution for restaurants. Operators are often slow to adopt new technologies and those that they've implemented aren't always satisfactory.”

eMarketer, 7/12/18

81.4 Technologies Consumers Want To Try

A 2018 survey by Datassential (www.datassential.com) asked adults which restaurant technologies they want most to try. Responses were as follows (percentage of respondents):

- Digital/mobile coupons: 44%
- Online/mobile delivery tracking: 41%
- Mobile loyalty apps: 39%
- Payment kiosks/tablets: 36%
- Self-ordering kiosks: 34%
- Online ordering for pickup: 32%
- Mobile apps for ordering: 32%
- Mobile/smartphone pay: 31%
- Cashier-free shopping/payment: 30%
- Order by text message: 30%
82.1 Overview
App Annie (www.appannie.com) monitors the sale and use of apps available on Google Play (Android), Apple App Store (iOS), Windows Store, and Amazon App Store. This chapter provides a summary of the June 2019 assessment for Restaurant and Food & Drink apps.

82.2 Free Apps
Based on number of downloads, App Annie ranked free Restaurant and Food & Drink apps downloaded in June 2019 as follows:
1. DoorDash - Order Food Delivery
2. Uber Eats: Food Delivery
3. McDonald's
4. Grubhub: Local Food Delivery
5. Starbucks
6. Postmates - Food Delivery
7. Chick-fil-A
8. Domino's Pizza USA
9. Pizza Hut
10. SONIC Drive-In
11. Chipotle
12. Instacart
13. Subway
14. Dunkin'
15. Burger King App
16. Little Caesars
17. Taco Bell
18. Coca-Cola
19. GoPuff
20. Tasty (BuzzFeed)
### 82.3 Paid Apps

Based on number of downloads, App Annie ranked paid Restaurant and Food & Drink apps downloaded in June 2019 as follows:

1. Forks Over Knives (Recipes)
2. Paprika Rezept-Manager 3 (Hindsight Labs)
3. Fit Men Cook - Healthy Recipes (Nibble Apps Ltd)
4. Oh She Glows
5. Yovana’s Smoothie Challenge (TouchZen Media)
6. Budget Bytes (SideChef Group Limited)
7. 101 Juice Recipes (Joe Cross)
8. iBartender Cocktail Recipes (Kevin Kozan)
9. Yovana App Bundle (TouchZen Media)
10. Daily Blends (Simple Green Smoothies)
11. GrillTime (Weagle)
12. MealBoard (Ray Bernardo)
13. Diners & Drive-Ins TV Unofficial Guide (GoLocalApps)
14. Food Intolerances (Baliza)
15. Lush Cocktails
16. Michelin Guide Europe 2019
17. Tip Calculator % Pro (Skol Games)
18. Flavortown (Grid Sixty Software)
19. Dining for Disney World (VersaEdge Software)
20. Nom Nom Paleo

### 82.4 Top Grossing Apps

Based on app purchase spending and in-app purchases, the top grossing Restaurant and Food & Drink apps in June 2019 were as follows:

2. Mealime Meal Plans & Recipes
3. eMeals - Healthy Meal Plans
4. Keto diet & Ketogenic recipes (Drama Labs)
5. WineRatings+ by Wine Spectator (M. Shanken Communications)
6. Panna: Video Recipes & Classes (How 2 Media)
7. Forks Over Knives (Recipes)
8. Paprika Rezept-Manager 3 (Hindsight Labs)
10. America’s Test Kitchen
11. Fit Men Cook - Healthy Recipes (Nibble Apps)
12. Keto Diet Meal Plan & Recipes (Realized)
13. 8,500+ Drink Recipes (Webworks)
14. Real Plans - Meal Planner (Holistic Squid)
15. Mealplan: Meal Prep Made Easy (Fitplan Technologies)
16. Plan to Eat - Meal Planner
17. Tastemade
18. 30 Day Whole Foods Meal Plan (Realized)
19. 101 Juice Recipes (Joe Cross)
20. Flash Order Digital Ordering (Mana Pass)

82.5 Market Resources
App Annie, 23 Geary Street, Suite 800, San Francisco, CA 94108. (415) 638-6840. (www.appannie.com)
83

ONLINE RESERVATIONS

83.1 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 four largest restaurant reservation services: OpenTable, Resy, Tock, and Yelp Reservations.

“At online reservations has become a utility, like gas or water or electric.”
Restaurant Hospitality

83.2 Profiles Of Key Players
OpenTable (www.opentable.com)
• OpenTable provides reservation services for more than 47,000 restaurants, seating more than 26 million diners per month in 2019. 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

Resy (www.resy.com)

• Launched in 2014, Resy builds operations software for restaurants, allowing them to book diners through their own websites.

• Resy works with over 4,000 restaurants in 200 markets across the U.S. Over 200 million diners had been seated as of June 2019.

• 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.

• Resy acquired Reserve, the fifth largest reservation service, in 2019.

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 access to 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 every month.
• About 4,000 restaurants use 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 2018, about 200 million diners were seated through Yelp Reservations.
• Yelp Reservations charges participating restaurants a $249 flat monthly fee with no additional charges per booking.
84

ONLINE & MOBILE ORDERING

84.1 Digital Ordering

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 outlet accounts for 3% of all restaurant traffic, or 1.9 billion foodservice visits annually.

Fifty percent (50%) of digital orders come at dinner time, and 35% of digital ordering includes 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.

According to Toast (http://pos.toasttab.com), a restaurant technology platform, 81% of adult Internet users have ordered from a restaurant’s website or mobile app. Restaurant digital orders increased at an average annual rate of 23% from 2013 through 2018 and are projected to triple in volume by 2020, according to The NPD Group.

“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

84.2 Ordering And Delivery Options

The 2018 Foodservice Industry Report, by TrendSource (www.trendsource.com), asked adults the likelihood they would use select restaurant ordering and delivery options. Responses were as follows:
Delivery Through the Restaurant’s App:
- Extremely likely: 13.1%
- Very likely: 16.2%
- Somewhat likely: 22.2%
- Slightly likely: 20.5%
- Not at all likely: 28.0%

On-Site Meal Pickup Through The Restaurant’s App:
- Extremely likely: 12.7%
- Very likely: 20.2%
- Somewhat likely: 24.8%
- Slightly likely: 20.8%
- Not at all likely: 21.5%

Delivery Through A Third-Party App:
- Extremely likely: 6.7%
- Very likely: 10.0%
- Somewhat likely: 16.8%
- Slightly likely: 20.5%
- Not at all likely: 45.9%

On-Site Meal Pickup Through a Third-Party App:
- Extremely likely: 4.8%
- Very likely: 9.3%
- Somewhat likely: 17.1%
- Slightly likely: 21.8%
- Not at all likely: 47.0%

84.3 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% of 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
85.1 Market Assessment
A host of startups are offering on-demand meal delivery on items ordered via smartphone apps. These restaurant delivery services use a model similar to that developed by Uber and Lyft.

Pentallect Inc. (www.pentallect.com) assessed the U.S. third-party food delivery market in 2018 at $13.0 billion. The market is projected to grow to $24.5 billion by 2020.

Second Measure (www.secondmeasure.com) reported that consumer spending among the top three delivery companies – GrubHub, DoorDash, and UberEats – increased 29% nationwide between July 2018 and January 2019.

85.2 Use Of Delivery Services
According to Market Force Information (www.marketforce.com), 36% of adults used a food delivery service to deliver a restaurant meal in 2018. By age, those that did so were as follows:

- 18-to-24: 55%
- 25-to-34: 49%
- 35-to-44: 40%
- 45-to-54: 33%
- 55-to-64: 26%
- 65 and older: 17%

According to The NPD Group (www.npd.com), the number of restaurant deliveries ordered in 2018, by generation, were as follows (change from prior year in parenthesis):

- Millennials: 553 million (3%)
- Generation Z: 552 million (13%)
“For the largest restaurant chains, delivery adoption has become a frenzied race as consumers – especially younger generations – redefine convenience in today’s stay-at-home economy. Generations raised on technology have set the bar high for access, convenience and integration. And that’s forced restaurant companies to step up their digital strategies.”

Nation’s Restaurant News, 3/18/19

85.3 Market Leaders

Ranked by number of users as of September 2018, the largest food delivery services are as follows (source: Verto Analytics [www.vertoanalytics.com]):

- GrubHub: 17.2 million
- DoorDash: 15.5 million
- UberEats: 8.1 million
- Postmates: 2.8 million

According to the U.S. QSR Benchmark Study, by Market Force Information, adult Internet users have used food delivery services to deliver a restaurant meal as follows:

- Restaurant’s own delivery service: 53.0%
- GrubHub: 36.0%
- UberEats: 31.0%
- DoorDash: 17.0%
- Postmates: 10.0%
- Eat24: 9.0%
- Seamless: 4.0%
- Delivery.com: 3.0%
- OrderUp: 3.0%
- Foodhub: 3.0%
- Caviar: 1.0%
- Waitr: 1.0%
- Amazon Restaurant: 1.0%
- Bit Squad: 0.9%
- Foodler: 0.7%
- Munchery: 0.7%
Amazon announced the closure of Amazon Restaurant in June 2019.
86.1 Importance Of Reviews
According to the National Restaurant Association (www.restaurant.org), 57% of consumers say they will avoid a business that has negative reviews and ratings.

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.

86.2 Top Online Review Sites
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).

86.3 Use Of Reviews
Research by Merchant Centric (www.merchantcentric.com) and Xenial (www.xenial.com) found 141 million reviews were posted for the 10 most-reviewed restaurant categories in 2018, a 64% increase from the prior year.

Forty-one percent (41%) of restaurant operators replied to reviews in 2018, a 29% increase from the prior year. For comparison, 28% of all businesses replied to reviews in 2018.
PART XI: BEVERAGE TRENDS & ANALYSES
87

BEVERAGE CONSUMPTION & SPENDING

87.1 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.

A 2019 survey by DIG Insights (www.diginsights.com) asked adults which beverages they had consumed in the past day. Responses were as follows:

- Bottled water: 66%
- Coffee: 63%
- Tap water: 47%
- Tea: 46%
- Alcoholic beverage: 36%
- Soft drink: 36%
- Milk/milk beverage: 35%
- Juice: 29%
- Sports drink: 9%
- Energy drink: 5%

87.2 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.

### 87.3 Alcoholic Beverages

According to the Distilled Spirits Council (DISCUS, www.discus.org), alcoholic beverage supplier gross revenue in 2018 was $66.4 billion, distributed as follows:

- **Beer**: $33.7 billion
- **Spirits**: $27.6 billion
- **Wine**: $12.7 billion

DISCUS estimates retail sales of alcoholic beverages at $250 billion. According to The Beverage Information Group (www.beveragenet.net), annual on-premise alcoholic beverage sales are approximately $130 billion.

Among the 220 million legal drinking-age consumers in the United States (70% of the total population), about 100 million identify 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>
</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 (2018), the following are the beverages most frequently consumed (source: Gallup):

- Beer: 42%
- Wine: 34%
- Spirits: 19%
- All/same: 4%

The following is the average weekly consumption (2018) among those who drink alcoholic beverages (source: Gallup):

- Less than one drink: 33%
- 1-to-7 drinks: 54%
- 8 or more drinks: 13%

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>

All

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

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2020-2021 • 383 •
<table>
<thead>
<tr>
<th>Alcohol Type</th>
<th>All</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beer</td>
<td>63%</td>
<td>75%</td>
<td>50%</td>
</tr>
<tr>
<td>Domestic wine</td>
<td>54%</td>
<td>45%</td>
<td>63%</td>
</tr>
<tr>
<td>Vodka</td>
<td>41%</td>
<td>40%</td>
<td>43%</td>
</tr>
<tr>
<td>Rum</td>
<td>34%</td>
<td>34%</td>
<td>35%</td>
</tr>
<tr>
<td>Imported wine</td>
<td>28%</td>
<td>26%</td>
<td>31%</td>
</tr>
<tr>
<td>Tequila</td>
<td>28%</td>
<td>27%</td>
<td>30%</td>
</tr>
<tr>
<td>Canadian/Irish/other whiskey</td>
<td>20%</td>
<td>25%</td>
<td>14%</td>
</tr>
<tr>
<td>Champagne</td>
<td>17%</td>
<td>13%</td>
<td>23%</td>
</tr>
<tr>
<td>Cordials and liqueurs</td>
<td>17%</td>
<td>14%</td>
<td>20%</td>
</tr>
<tr>
<td>Bourbon</td>
<td>15%</td>
<td>23%</td>
<td>6%</td>
</tr>
<tr>
<td>Gin</td>
<td>14%</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>Scotch</td>
<td>11%</td>
<td>17%</td>
<td>4%</td>
</tr>
<tr>
<td>Cognac</td>
<td>8%</td>
<td>11%</td>
<td>4%</td>
</tr>
<tr>
<td>Brandy</td>
<td>7%</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
</tr>
</tbody>
</table>

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></td>
</tr>
<tr>
<td>Male, ages 50 and older:</td>
<td></td>
</tr>
<tr>
<td>Female, ages 19-to-49:</td>
<td></td>
</tr>
<tr>
<td>Female, ages 50 and older:</td>
<td></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>State</th>
<th>Beer</th>
<th>Wine</th>
<th>Distilled Spirits</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. New Hampshire</td>
<td>#2</td>
<td>#2</td>
<td>#1</td>
</tr>
<tr>
<td>2. District of Columbia</td>
<td>#14</td>
<td>#1</td>
<td>#2</td>
</tr>
<tr>
<td>3. Nevada</td>
<td>#1</td>
<td>#4</td>
<td>#3</td>
</tr>
<tr>
<td>4. Delaware</td>
<td>#17</td>
<td>#5</td>
<td>#4</td>
</tr>
<tr>
<td>5. Wyoming</td>
<td>#3</td>
<td>#33</td>
<td>#6</td>
</tr>
<tr>
<td>6. Wisconsin</td>
<td>#6</td>
<td>#25</td>
<td>#5</td>
</tr>
<tr>
<td>7. Florida</td>
<td>#22</td>
<td>#14</td>
<td>#9</td>
</tr>
<tr>
<td>8. Colorado</td>
<td>#19</td>
<td>#16</td>
<td>#8</td>
</tr>
<tr>
<td>9. Montana</td>
<td>#4</td>
<td>#23</td>
<td>#23</td>
</tr>
<tr>
<td>10. North Dakota</td>
<td>#5</td>
<td>#42</td>
<td>#9</td>
</tr>
<tr>
<td>11. (tie) Massachusetts</td>
<td>#41</td>
<td>#5</td>
<td>#11</td>
</tr>
<tr>
<td>11. (tie) Arizona</td>
<td>#13</td>
<td>#19</td>
<td>#24</td>
</tr>
<tr>
<td>13. Vermont</td>
<td>#22</td>
<td>#8</td>
<td>#32</td>
</tr>
<tr>
<td></td>
<td>State</td>
<td>#1</td>
<td>#2</td>
</tr>
<tr>
<td>---</td>
<td>----------------</td>
<td>----</td>
<td>----</td>
</tr>
<tr>
<td>14.</td>
<td>Alaska:</td>
<td>#25</td>
<td>#19</td>
</tr>
<tr>
<td>15.</td>
<td>Rhode Island:</td>
<td>#39</td>
<td># 8</td>
</tr>
<tr>
<td>16.</td>
<td>Minnesota:</td>
<td>#30</td>
<td>#25</td>
</tr>
<tr>
<td>17.</td>
<td>South Dakota:</td>
<td># 8</td>
<td>#44</td>
</tr>
<tr>
<td>17.</td>
<td>New Mexico:</td>
<td># 6</td>
<td>#27</td>
</tr>
<tr>
<td>19.</td>
<td>Hawaii:</td>
<td>#24</td>
<td>#15</td>
</tr>
<tr>
<td>19.</td>
<td>Louisiana:</td>
<td>#11</td>
<td>#32</td>
</tr>
<tr>
<td>21.</td>
<td>Maine:</td>
<td>#28</td>
<td>#18</td>
</tr>
<tr>
<td>22.</td>
<td>South Carolina:</td>
<td>#16</td>
<td>#33</td>
</tr>
<tr>
<td>22.</td>
<td>Oregon:</td>
<td>#32</td>
<td>#12</td>
</tr>
<tr>
<td>24.</td>
<td>Illinois:</td>
<td>#27</td>
<td>#22</td>
</tr>
<tr>
<td>25.</td>
<td>Idaho:</td>
<td>#37</td>
<td># 3</td>
</tr>
<tr>
<td>26.</td>
<td>Missouri:</td>
<td>#20</td>
<td>#31</td>
</tr>
<tr>
<td>27.</td>
<td>New Jersey:</td>
<td>#48</td>
<td>#11</td>
</tr>
<tr>
<td>28.</td>
<td>Nebraska:</td>
<td>#11</td>
<td>#40</td>
</tr>
<tr>
<td>29.</td>
<td>Connecticut:</td>
<td>#49</td>
<td># 7</td>
</tr>
<tr>
<td>29.</td>
<td>California:</td>
<td>#42</td>
<td>#10</td>
</tr>
<tr>
<td>31.</td>
<td>Pennsylvania:</td>
<td># 9</td>
<td>#33</td>
</tr>
<tr>
<td>32.</td>
<td>Washington:</td>
<td>#45</td>
<td>#13</td>
</tr>
<tr>
<td>32.</td>
<td>Texas:</td>
<td># 9</td>
<td>#33</td>
</tr>
<tr>
<td>34.</td>
<td>Mississippi:</td>
<td>#14</td>
<td>#50</td>
</tr>
<tr>
<td>35.</td>
<td>Michigan:</td>
<td>#35</td>
<td>#29</td>
</tr>
<tr>
<td>36.</td>
<td>Georgia:</td>
<td>#33</td>
<td>#29</td>
</tr>
<tr>
<td>36.</td>
<td>Maryland:</td>
<td>#47</td>
<td>#24</td>
</tr>
<tr>
<td>38.</td>
<td>Iowa:</td>
<td>#17</td>
<td>#45</td>
</tr>
<tr>
<td>39.</td>
<td>Virginia:</td>
<td>#37</td>
<td>#21</td>
</tr>
<tr>
<td>39.</td>
<td>Ohio:</td>
<td>#20</td>
<td>#37</td>
</tr>
<tr>
<td>41.</td>
<td>North Carolina:</td>
<td>#30</td>
<td>#27</td>
</tr>
<tr>
<td>42.</td>
<td>Indiana:</td>
<td>#40</td>
<td>#38</td>
</tr>
<tr>
<td>42.</td>
<td>Tennessee:</td>
<td>#26</td>
<td>#40</td>
</tr>
<tr>
<td>44.</td>
<td>New York:</td>
<td>#49</td>
<td>#16</td>
</tr>
<tr>
<td>44.</td>
<td>Oklahoma:</td>
<td>#42</td>
<td>#49</td>
</tr>
<tr>
<td>46.</td>
<td>Alabama:</td>
<td>#34</td>
<td>#39</td>
</tr>
<tr>
<td>47.</td>
<td>Kansas:</td>
<td>#36</td>
<td>#42</td>
</tr>
<tr>
<td>48.</td>
<td>Arkansas:</td>
<td>#42</td>
<td>#48</td>
</tr>
<tr>
<td>49.</td>
<td>Kentucky:</td>
<td>#46</td>
<td>#45</td>
</tr>
<tr>
<td>50.</td>
<td>West Virginia:</td>
<td>#29</td>
<td>#51</td>
</tr>
<tr>
<td>51.</td>
<td>Utah:</td>
<td>#51</td>
<td>#45</td>
</tr>
</tbody>
</table>

Note: Overall ranking based on consumption volumes adjusted for average relative alcohol content of beer, wine, and distilled spirits.

There are two main drivers in the overall beverage alcohol market, according to Beverage Marketing Corporation (www.beveragemarketing.com): 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.

87.4 Refreshment And Nonalcoholic Beverages

The refreshment and nonalcoholic beverages category includes carbonated soft drinks, bottled water, juice and juice drinks, ready-to-drink tea and coffee, sports drinks, and energy drinks.

According to Beverage Marketing Corporation, volume and retail sales have been as follows (change from prior year in parenthesis):

<table>
<thead>
<tr>
<th>Volume</th>
<th>Retail Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009: 29.07 million gallons (-2.7%)</td>
<td>$143.54 billion (-3.2%)</td>
</tr>
<tr>
<td>2010: 29.46 million gallons (1.4%)</td>
<td>$145.75 billion (1.5%)</td>
</tr>
<tr>
<td>2011: 29.67 million gallons (0.7%)</td>
<td>$149.97 billion (2.9%)</td>
</tr>
<tr>
<td>2012: 30.04 million gallons (1.2%)</td>
<td>$153.28 billion (2.2%)</td>
</tr>
<tr>
<td>2013: 30.02 million gallons (-0.1%)</td>
<td>$153.38 billion (0.1%)</td>
</tr>
<tr>
<td>2014: 30.67 million gallons (2.2%)</td>
<td>$157.61 billion (2.8%)</td>
</tr>
<tr>
<td>2015: 31.51 million gallons (2.7%)</td>
<td>$163.96 billion (4.0%)</td>
</tr>
<tr>
<td>2016: 32.55 million gallons (3.3%)</td>
<td>$169.26 billion (3.2%)</td>
</tr>
<tr>
<td>2017: 33.15 million gallons (1.8%)</td>
<td>$173.27 billion (2.4%)</td>
</tr>
<tr>
<td>2018: 33.87 million gallons (2.2%)</td>
<td>$179.93 billion (3.8%)</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<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>
</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>
</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>
</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>
</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>
</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>
</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>
</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>
</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>
</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.
MARKET LEADERS

88.1 Overview
Beverage Industry annually ranks the Top 100 Beverage Companies by revenue. The list is published in the June issue.

88.2 Rank By 2018 Revenue
- Anheuser-Busch InBev (Belgium): $54.62 billion
- Nestlé SA (Switzerland): $38.74 billion
- The Coca-Cola Co. (Atlanta, GA): $31.86 billion
- Pepsico (Purchase, NY): $29.74 billion
- Heineken (Netherlands): $25.11 billion
- Suntory Holdings Ltd. (Japan): $22.84 billion
- Starbucks (Seattle, WA): $19.69 billion
- Diageo (United Kingdom): $15.85 billion
- Unilever Group (United Kingdom): $12.78 billion
- Molson Coors Brewing Co. (Denver, CO): $10.77 billion
- Pernod Ricard (France): $10.04 billion
- Constellation Brands (Victor, NY): $7.58 billion
- Keurig Dr. Pepper (Frisco, TX): $7.44 billion
- Red Bull (Austria): $7.29 billion
- Bacardi (Bermuda): $6.27 billion
- LVMH Moët Hennessy (France): $5.74 billion
- Jacobs Douwe Egberts (France): $5.22 billion
- Danone Group (France): $4.97 billion
- The Wonderful Co. (Los Angeles, CA): $4.62 billion
- E. & J. Gallo Winery (Modesto, CA): $4.49 billion
- Ito En Group (Japan): $4.48 billion
- Campbell Soup Co. (Camden, NJ): $4.21 billion
- Monster Beverage Corp. (Corona, CA): $3.80 billion
- Brown-Forman Corp. (Louisville, KY): $3.24 billion
- Hormel Foods (Austin, MN): $2.52 billion
- Cott Corp. (Tampa, FL): $2.37 billion
- Niagara Bottling (Ontario, CA): $2.23 billion
- J.M. Smucker Co. (Denver, CO): $2.10 billion
- Britvic Plc (United Kingdom): $1.96 billion
<table>
<thead>
<tr>
<th>Company</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Davide Campari (Italy)</td>
<td>$1.91 billion</td>
</tr>
<tr>
<td>Treasury Wine Estates (Australia)</td>
<td>$1.70 billion</td>
</tr>
<tr>
<td>D.G. Yuengling &amp; Son Inc. (Pottsville, PA)</td>
<td>$1.66 billion</td>
</tr>
<tr>
<td>Lassonde Industries Inc. (Canada)</td>
<td>$1.59 billion</td>
</tr>
<tr>
<td>Blue Diamond Growers (Sacramento, CA)</td>
<td>$1.56 billion</td>
</tr>
<tr>
<td>Arizona Beverage Co. (Woodbury, NY)</td>
<td>$1.34 billion</td>
</tr>
<tr>
<td>Glanbia (Ireland)</td>
<td>$1.33 billion</td>
</tr>
<tr>
<td>The Wine Group (Livermore, CA)</td>
<td>$1.13 billion</td>
</tr>
<tr>
<td>Ocean Spray Cranberries (Lakeville, MA)</td>
<td>$1.02 billion</td>
</tr>
<tr>
<td>National Beverage Corp. (Fort Lauderdale, FL)</td>
<td>$1.01 billion</td>
</tr>
<tr>
<td>The Boston Beer Co. (Boston, MA)</td>
<td>$996 million</td>
</tr>
<tr>
<td>Living Essentials (Farmington Hills, MI)</td>
<td>$966 million</td>
</tr>
<tr>
<td>Viña Concha Y Toro S.A. (Chile)</td>
<td>$953 million</td>
</tr>
<tr>
<td>Trinchero Family Estates (St. Helena, CA)</td>
<td>$900 million</td>
</tr>
<tr>
<td>Peet's Coffee &amp; Tea (Emeryville, CA)</td>
<td>$870 million</td>
</tr>
<tr>
<td>Talking Rain Beverage Co. (Preston, WA)</td>
<td>$863 million</td>
</tr>
<tr>
<td>Rockstar Inc. (Las Vegas, NV)</td>
<td>$765 million</td>
</tr>
<tr>
<td>Ste. Michelle Wine Estates (Woodinville, WA)</td>
<td>$761 million</td>
</tr>
<tr>
<td>Freixenet SA (Spain)</td>
<td>$755 million</td>
</tr>
<tr>
<td>Mast-Jägermeister (Germany)</td>
<td>$684 million</td>
</tr>
<tr>
<td>Kendall-Jackson Wine Estates (Santa Rosa, CA)</td>
<td>$669 million</td>
</tr>
<tr>
<td>Harvest Hill Beverage Corp. (Verona, PA)</td>
<td>$663 million</td>
</tr>
<tr>
<td>Mark Anthony Group (Canada)</td>
<td>$649 million</td>
</tr>
<tr>
<td>C&amp;C Group (Ireland)</td>
<td>$616 million</td>
</tr>
<tr>
<td>Farmer Bros. (Northlake, TX)</td>
<td>$606 million</td>
</tr>
<tr>
<td>Fifco USA (Rochester, NY)</td>
<td>$557 million</td>
</tr>
<tr>
<td>Tata Global Beverages (India)</td>
<td>$543 million</td>
</tr>
<tr>
<td>All Market Inc. (New York, NY)</td>
<td>$479 million</td>
</tr>
<tr>
<td>BA Sports Nutrition (Queens, NY)</td>
<td>$435 million</td>
</tr>
<tr>
<td>Florida's Natural Growers (Lake Wales, FL)</td>
<td>$420 million</td>
</tr>
<tr>
<td>Banfi Vintners (Old Brookville, NY)</td>
<td>$406 million</td>
</tr>
<tr>
<td>Terlato Wines International (Lake Bluff, IL)</td>
<td>$383 million</td>
</tr>
<tr>
<td>Tree Top Inc. (Selah, WA)</td>
<td>$381 million</td>
</tr>
<tr>
<td>Duvel Moortgat (Belgium)</td>
<td>$353 million</td>
</tr>
<tr>
<td>Bronco Wine Co. (Ceres, CA)</td>
<td>$348 million</td>
</tr>
<tr>
<td>Tampico Beverages (Chicago, IL)</td>
<td>$315 million</td>
</tr>
<tr>
<td>Primo Water Corp. (Winston-Salem, NC)</td>
<td>$302 million</td>
</tr>
<tr>
<td>Jel Sert Co. (Chicago, IL)</td>
<td>$289 million</td>
</tr>
<tr>
<td>Stone Brewing (Escondido, CA)</td>
<td>$262 million</td>
</tr>
<tr>
<td>Carolina Beverage Corp. (Salisbury, NC)</td>
<td>$250 million</td>
</tr>
<tr>
<td>Sierra Nevada (Chico, CA)</td>
<td>$242 million</td>
</tr>
<tr>
<td>Heaven Hill Distilleries (Bardstown, KY)</td>
<td>$214 million</td>
</tr>
<tr>
<td>New Belgium Brewing (Fort Collins, CO)</td>
<td>$213 million</td>
</tr>
<tr>
<td>Craft Brew Alliance (Portland, OR)</td>
<td>$206 million</td>
</tr>
<tr>
<td>Company</td>
<td>Revenue</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>Hint Inc. (San Francisco, CA)</td>
<td>$200 million</td>
</tr>
<tr>
<td>Essentia Water (Bothell, WA)</td>
<td>$196 million</td>
</tr>
<tr>
<td>R.C. Bigelow Inc. (Fairfield, CT)</td>
<td>$185 million</td>
</tr>
<tr>
<td>Langer Juice Co. (City of Industry, CA)</td>
<td>$171 million</td>
</tr>
<tr>
<td>Polar Beverages (Worchester, MA)</td>
<td>$160 million</td>
</tr>
<tr>
<td>Phusion Projects (Chicago, IL)</td>
<td>$156 million</td>
</tr>
<tr>
<td>Sun Orchard (Miami, FL)</td>
<td>$142 million</td>
</tr>
<tr>
<td>Califia Farms (Los Angeles, CA)</td>
<td>$135 million</td>
</tr>
<tr>
<td>Brooklyn Bottling (Milton, NY)</td>
<td>$130 million</td>
</tr>
<tr>
<td>Marchesi De’ Frescobaldi (Italy)</td>
<td>$123 million</td>
</tr>
<tr>
<td>The Gambrinus Co. (San Antonio, TX)</td>
<td>$118 million</td>
</tr>
<tr>
<td>The Hain Celestial Group (Lake Success, NY)</td>
<td>$116 million</td>
</tr>
<tr>
<td>Deschutes Brewery Inc. (Bend, OR)</td>
<td>$111 million</td>
</tr>
<tr>
<td>Founders Brewing Co. (Grand Rapids, MI)</td>
<td>$108 million</td>
</tr>
<tr>
<td>Lifeway Foods (Morton Grove, IL)</td>
<td>$103 million</td>
</tr>
<tr>
<td>Bell's Brewery Inc. (Galesburg, MI)</td>
<td>$100 million</td>
</tr>
<tr>
<td>Don Sebastiani &amp; Sons (Sonoma, CA)</td>
<td>$95 million</td>
</tr>
<tr>
<td>Castle Brands Inc. (New York, NY)</td>
<td>$90 million</td>
</tr>
<tr>
<td>Kasapreko Co. Ltd. (Ghana)</td>
<td>$90 million</td>
</tr>
<tr>
<td>Welch’s (Concord, MA)</td>
<td>$77 million</td>
</tr>
<tr>
<td>Canarchy Craft Brewery Collective (Longmont, CO)</td>
<td>$72 million</td>
</tr>
<tr>
<td>Brooklyn Brewery (Brooklyn, NY)</td>
<td>$66 million</td>
</tr>
<tr>
<td>Sweetwater Brewing Co. (Atlanta, GA)</td>
<td>$66 million</td>
</tr>
<tr>
<td>Total Beverage Solution (Mt. Pleasant, SC)</td>
<td>$64 million</td>
</tr>
<tr>
<td>Celsius Holdings Inc. (Boca Raton, FL)</td>
<td>$53 million</td>
</tr>
<tr>
<td>Dogfish Head Brewery (Milton, DE)</td>
<td>$49 million</td>
</tr>
<tr>
<td>New Glarus Brewing Co. (New Glarus, WI)</td>
<td>$48 million</td>
</tr>
</tbody>
</table>

88.3 Market Resources

*Beverage Industry*, 2401 W. Big Beaver Road, Suite 700, Troy, MI 48084. (248) 362-3700. (www.bevindustry.com)
89

BEER

89.1 Market Assessment
The Brewers Association (www.brewersassociation.org) estimates U.S. beer sales in 2018 at $114.2 billion, a 3% increase from a year prior. In 2018, 196.2 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)

_________________________________________________________________

“With dollar sales reaching approximately $114 billion, the U.S. beer market continues to be one of the top categories based on dollar sales in the overall beverage industry. However, although dollar sales have seen slight increases, volume sales continue to remain challenged. The beverage alcohol market continues to evolve with beer losing share to both spirits and wine.”

2019 State Of The Beverage Industry
Beverage Industry, 6/19

_________________________________________________________________

Domestic beer accounts for 82% of beer consumption, according to the Beer Institute (www.beerinstitute.org).

According Beverage Information Group (www.bevinfgroup.com), the U.S. beer market is distributed by category as follows:

- Light: 52%
- Premium & super premium: 12%
- Popular: 8%
- Craft: 7%
- Ice: 4%
- Malt liquor: 2%
- Flavored malt beverages: 2%
According to the Brewers Association, 7,450 breweries were in operation in the U.S. in 2018, an increase from 6,596 a year prior. The distribution in 2018 was as follows:

- Microbreweries: 4,522
- Brewpubs: 2,594
- Regional craft breweries: 230
- Large/non-craft breweries: 104

## 89.2 Market Leaders

*Beer Handbook*, by Beverage Information Group, reports the leading beer brands as follows:

### Domestic

- Bud Light (Anheuser-Busch/InBev): 551.7 million cases
- Coors Light (MillerCoors): 244.9 million cases
- Budweiser (Anheuser-Busch/InBev): 205.6 million cases
- Miller Lite (MillerCoors): 186.9 million cases
- Natural Light (Anheuser-Busch/InBev): 95.1 million cases
- Busch Light (Anheuser-Busch/InBev): 89.4 million cases
- Busch (Anheuser-Busch/InBev): 73.9 million cases
- Michelob Ultra (Anheuser-Busch/InBev): 57.0 million cases
- Keystone Light (MillerCoors): 48.5 million cases
- Miller High Life (MillerCoors): 46.9 million cases
- Yuengling (D.G. Yuengling & Son): 39.5 million cases

### Imported Brands

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

### Craft Brewers

- Boston Beer Co. (Boston, MA): 35,098 cases
- Sierra Nevada Brewing Co. (Chico, CA): 14,711 cases
- New Belgium Brewing Co. (Fort Collins, CO): 13,023 cases
- Craft Brew Alliance (Portland, OR): 10,913 cases
- Lagunitas Brewing Co. (Petaluma, CA): 8,285 cases
89.3 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 2018 there were 7,346, according to the Brewers Association.

According to the Brewers Association, retail sales of craft beer in 2018 were $27.6 billion, with 25.9 million barrels sold, increases of 7% each, respectively, over the previous year. The craft brewing sales share in 2018 was 13.2% by volume and 24.1% by dollars.

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.

89.4 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.
89.5 Beer Sales In Groceries And Retail

IRI (www.iriworldwide.com) reported beer sales at U.S. supermarkets, drug stores, gas and convenience stores, mass merchandisers, military commissaries, and select club and dollar retail chains in 2018 at $27.24 billion.

- Domestic premium: $12.60 billion
- Imported brands: $ 7.06 billion
- Craft beers: $ 4.21 billion
- Domestic super-premium: $ 2.94 billion
- Hard ciders: $ 433 million

2019 State of the Beverage Industry, published by Beverage Industry and based on data from IRI, ranked market leaders as follows:

Craft Beers
- Blue Moon: $ 334 million
- Samuel Adams: $ 256 million
- Sierra Nevada: $ 252 million
- New Belgium: $ 201 million
- Lagunitas: $ 182 million
- Leinenkugel Specialty: $ 151 million
- Shiner: $ 132 million
- Founders: $ 108 million

Domestic Premium
- Bud: $7.32 billion
- Coors: $2.51 billion
- Miller Lite: $2.01 billion
- Yuengling: $ 388 million
- Rolling Rock: $ 129 million

Domestic Super-Premium
- Michelob: $2.12 billion
- Bud Specialty: $ 707 million
- Landshark: $ 46 million
- Budweiser Reserve Collection: $ 36 million
- George Killian’s: $ 13 million

Hard Ciders
- Angry Orchard: $ 246 million
- Bold Rock: $ 25 million
- Strongbow: $ 22 million
- Stella Artois Cidre: $ 15 million
- 2 Towns: $ 12 million
Imported Brands

- Corona: $2.37 billion
- Modelo: $1.97 billion
- Heineken: $794 million
- Dos Equis XX: $382 million
- Stella Artois: $367 million
- Tecante: $202 million
- Labatt: $152 million
- Guinness: $144 million
- Pacifico: $125 million
- Foster’s: $75 million

89.6 Market Resources
Beer Institute, 440 First Street NW, Suite 350, Washington, DC 20001. (202) 737-2337. (www.beerinstitute.org)

Beverage Information Group, 40 Richards Avenue, Suite 300, Norwalk, CT 06854. (203) 855-8499. (www.bevinogroup.com)

Beverage Marketing Corporation, 850 Third Avenue, New York, NY 10022. (212) 826-1255. (www.beveragemarketing.com)

Brewers Association, 1327 Spruce Street, Boulder, CO 80302. (303) 447-0816. (www.brewersassociation.org)

United States Association of Cider Makers, P.O. Box 66483, Portland, OR 97290. (303) 695-0780. (www.ciderassociation.org)
90.1 Market Assessment

The Distilled Spirits Council (www.distilledspirits.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
- 2015: $24.09 billion
- 2016: $25.19 billion
- 2017: $26.22 billion
- 2018: $27.55 billion

Retail and foodservice sales are roughly three times distiller revenue.

Spirit market distribution by volume is as follows (source: Beverage Information Group [www.bevinfogroup.com]):

- Vodka: 34%
- Whiskey: 23%
  - straight: 9%
  - Canadian: 7%
  - Scotch: 4%
  - blended: 2%
  - Irish: 1%
- Rum: 13%
- Cordials and liqueurs: 10%
- Tequila: 7%
- Gin: 5%
- Brandy and cognac: 5%
- RTD cocktails: 2%

Shipments and revenue of distilled spirits in 2018, by category, were as follows (change from previous year in parenthesis):

<table>
<thead>
<tr>
<th>Volume*</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total: 231.14 million cases (2.2%)</td>
<td>$27.55 billion (5.0%)</td>
</tr>
<tr>
<td>Whiskey: 66.10 million cases (3.2%)</td>
<td>$ 9.57 billion (5.4%)</td>
</tr>
<tr>
<td>Vodka: 72.47 million cases (1.6%)</td>
<td>$ 6.40 billion (2.9%)</td>
</tr>
<tr>
<td>Tequila/mezcal: 18.54 million cases (7.7%)</td>
<td>$ 3.01 billion (10.2%)</td>
</tr>
<tr>
<td>Brandy and cognac: 14.76 million cases (3.7%)</td>
<td>$ 2.66 billion (16.6%)</td>
</tr>
<tr>
<td>Cordials and liqueurs: 19.75 million cases (1.0%)</td>
<td>$ 2.39 billion (1.2%)</td>
</tr>
<tr>
<td>Rum: 23.87 million cases (-3.1%)</td>
<td>$ 2.30 billion (-1.3%)</td>
</tr>
<tr>
<td>Gin: 9.76 million cases (-1.1%)</td>
<td>$ 891 million (-0.5%)</td>
</tr>
<tr>
<td>RTD cocktails: 5.88 million cases (2.3%)</td>
<td>$ 327 million (2.2%)</td>
</tr>
</tbody>
</table>

* 9-liter case equivalents
**90.2 Major Brands**

By category, the following are major distilled spirits brands (source: Distilled Spirits Council):

**Brandy & Cognac**
- Value: Dekuyper 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, Oxley, The Botanist

**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 Horintos
- Super premium: Cabo Wabo, Don Julio, Herradura, Patrón, Sauza Tres Generaciones

**Vodka**
- Value: Gilbey’s, Kamchatka, Popov, Wolfschmidt
• Premium: Pearl, Pinnacle, Skyy, Smirnoff, Svedka
• High end premium: Absolut, American Harvest, Effen, Finlandia
• Super premium: Belvedere, Ciroc, 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

### 90.3 Brandy and Cognac

Shipments and distiller revenue for brandy and cognac have been as follows (source: Distilled Spirits Council):

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>11.53 million cases</td>
<td>$1.71 billion</td>
</tr>
<tr>
<td>2015</td>
<td>12.36 million cases</td>
<td>$1.91 billion</td>
</tr>
<tr>
<td>2016</td>
<td>13.02 million cases</td>
<td>$2.12 billion</td>
</tr>
<tr>
<td>2017</td>
<td>13.72 million cases</td>
<td>$2.28 billion</td>
</tr>
<tr>
<td>2018</td>
<td>14.76 million cases</td>
<td>$2.66 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 (source: The Beverage Information Group):
• E&J: 3.13 million cases
• Hennessey: 2.58 million cases
• Paul Masson: 1.56 million cases
• Christian Brothers: 1.16 million cases
Rémy Martin: 626,000 cases  
Courvoisier: 440,000 cases

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.

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“Cognac has seen a resurgence in recent years, as more Americans are enjoying France’s native spirit.”

Distilled Spirits Council, 2/19

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90.4 Cordials and Liqueurs

Distilled Spirits Council reported 2018 shipments for cordials and liqueurs were 19.75 million cases; distiller revenue was $2.39 billion.

The following are the leading brands of cordials and liqueurs in the U.S., ranked by number of cases shipped (source: The Beverage Information Group):
• Fireball: 4.21 million cases
• DeKuyper: 2.12 million cases
• Jägermeister: 1.75 million cases
• Baileys: 1.27 million cases
• Southern Comfort: 1.00 million cases
• Kahlua: 810,000 cases
• Hiram Walker Cordials: 725,000 cases

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.

**90.5 Gin**

Shipments and distiller revenue for gin have been as follows (source: Distilled Spirits Council):

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>10.04 million cases</td>
<td>$865 million</td>
</tr>
<tr>
<td>2015</td>
<td>9.86 million cases</td>
<td>$857 million</td>
</tr>
<tr>
<td>2016</td>
<td>9.93 million cases</td>
<td>$876 million</td>
</tr>
<tr>
<td>2017</td>
<td>9.87 million cases</td>
<td>$895 million</td>
</tr>
<tr>
<td>2018</td>
<td>9.76 million cases</td>
<td>$891 million</td>
</tr>
</tbody>
</table>

The following are the leading brands of gin in the U.S., ranked by number of cases shipped (source: The Beverage Information Group):

- Seagram’s Gin: 1.99 million cases
- Tanqueray: 1.33 million cases
- Bombay Sapphire: 930,000 cases
- New Amsterdam: 716,000 cases
- Gordon’s: 558,000 cases
- Beefeater: 477,000 cases
- Barton: 340,000 cases
- Gilbey’s: 328,000 cases

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.

**90.6 RTD Cocktails**

Distilled Spirits Council reported 2018 shipments for cordials and liqueurs were 5.88 million cases; distiller revenue was $327 million.

The following are the leading brands of RTD cocktails in the U.S., ranked by number of cases shipped (source: The Beverage Information Group):

- Jose Cuervo RTD: 1.12 million cases
- Chi-Chi’s: 396,000 cases
- 1800 Ultimate Margarita: 332,000 cases
- Kahlua Drinks To Go: 295,000 cases
- BuzzBallz: 226,000 cases
**90.7 Rum**

Shipments and distiller revenue for rum have been as follows (source: Distilled Spirits Council):

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>25.18 million cases</td>
<td>$2.37 billion</td>
</tr>
<tr>
<td>2015</td>
<td>24.79 million cases</td>
<td>$2.32 billion</td>
</tr>
<tr>
<td>2016</td>
<td>24.75 million cases</td>
<td>$2.33 billion</td>
</tr>
<tr>
<td>2017</td>
<td>24.64 million cases</td>
<td>$2.33 billion</td>
</tr>
<tr>
<td>2018</td>
<td>23.87 million cases</td>
<td>$2.30 billion</td>
</tr>
</tbody>
</table>

The following are the leading brands of rum in the U.S., ranked by number of cases shipped (source: The Beverage Information Group):

- Bacardi: 6.87 million cases
- Captain Morgan: 5.71 million cases
- Malibu: 2.03 million cases
- Admiral Nelson: 860,000 cases
- Cruzan: 772,000 cases
- Sailor Jerry: 723,000 cases
- Castilio: 542,000 cases

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.

“In recent years, distillers have experimented with flavored rums, making the category much more versatile in offerings. Flavored and Spiced rums now account for over 55% of all rums sold.”

Distilled Spirits Council, 2/19
90.8 Tequila

Shipments and distiller revenue for tequila have been as follows (source: Distilled Spirits Council):

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>13.80 million cases</td>
<td>$2.11 billion</td>
</tr>
<tr>
<td>2015</td>
<td>14.81 million cases</td>
<td>$2.31 billion</td>
</tr>
<tr>
<td>2016</td>
<td>15.87 million cases</td>
<td>$2.48 billion</td>
</tr>
<tr>
<td>2017</td>
<td>17.21 million cases</td>
<td>$2.73 billion</td>
</tr>
<tr>
<td>2018</td>
<td>18.54 million cases</td>
<td>$3.01 billion</td>
</tr>
</tbody>
</table>

The following are the leading brands of tequila in the U.S., ranked by number of cases shipped (source: The Beverage Information Group):

- José Cuervo: 3.51 million cases
- Patrón: 2.47 million cases
- Sauza: 2.24 million cases
- 1800: 1.29 million cases
- Juarez: 785,000 cases
- Familia Camarena: 695,000 cases
- Montezuma: 670,000 cases

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.

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“Since 2002, Tequila volumes have grown 158%, an average rate of 6.1% per year. One of the keys to Tequila’s U.S. growth has been distiller’s ability to offer a product for every budget and occasion.”

Distilled Spirits Council, 2/19

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RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2020-2021
• 401 •
90.9  Vodka

Shipmentst and distiller revenue for vodka have been as follows (source: Distilled Spirits Council):

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>66.94 million cases</td>
<td>$5.78 billion</td>
</tr>
<tr>
<td>2015</td>
<td>68.16 million cases</td>
<td>$5.81 billion</td>
</tr>
<tr>
<td>2016</td>
<td>69.78 million cases</td>
<td>$6.04 billion</td>
</tr>
<tr>
<td>2017</td>
<td>71.34 million cases</td>
<td>$6.22 billion</td>
</tr>
<tr>
<td>2018</td>
<td>72.47 million cases</td>
<td>$6.40 billion</td>
</tr>
</tbody>
</table>

The following are the leading brands of vodka in the U.S., ranked by number of cases shipped (source: The Beverage Information Group; change from previous year in parenthesis):

**Domestic**
- Smirnoff: 9.24 million cases
- Tito’s Handmade: 5.80 million cases
- New Amsterdam: 5.36 million cases
- Burnett’s: 2.87 million cases
- Skyy: 2.62 million cases

**Imported**
- Svedka: 4.49 million cases
- Absolut: 3.82 million cases
- Pinnacle: 2.45 million cases
- Grey Goose: 2.21 million cases
- Ketel One: 2.14 million cases

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 market share among alcoholic beverages, sales of vodka have grown even faster.

An important growth driver has been the continued popularity of flavored vodkas as they now account for around 21% of all vodkas sold. Today, consumers can enjoy vodkas that have been infused with natural spices, refreshing citrus flavors, raspberry, vanilla, and others.
**90.10 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: Distilled Spirits Council):

### American Bourbon and Straight Whiskey

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>19.36 million cases</td>
<td>$2.68 billion</td>
</tr>
<tr>
<td>2015</td>
<td>20.37 million cases</td>
<td>$2.89 billion</td>
</tr>
<tr>
<td>2016</td>
<td>21.75 million cases</td>
<td>$3.11 billion</td>
</tr>
<tr>
<td>2017</td>
<td>23.15 million cases</td>
<td>$3.37 billion</td>
</tr>
<tr>
<td>2018</td>
<td>24.51 million cases</td>
<td>$3.59 billion</td>
</tr>
</tbody>
</table>

### Canadian Whisky

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>16.34 million cases</td>
<td>$1.71 billion</td>
</tr>
<tr>
<td>2015</td>
<td>16.74 million cases</td>
<td>$1.85 billion</td>
</tr>
<tr>
<td>2016</td>
<td>17.14 million cases</td>
<td>$1.96 billion</td>
</tr>
<tr>
<td>2017</td>
<td>17.55 million cases</td>
<td>$2.00 billion</td>
</tr>
<tr>
<td>2018</td>
<td>17.36 million cases</td>
<td>$2.00 billion</td>
</tr>
</tbody>
</table>

### Irish Whiskey

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>2.77 million cases</td>
<td>$ 553 million</td>
</tr>
<tr>
<td>2015</td>
<td>3.22 million cases</td>
<td>$ 664 million</td>
</tr>
<tr>
<td>2016</td>
<td>3.82 million cases</td>
<td>$ 795 million</td>
</tr>
<tr>
<td>2017</td>
<td>4.25 million cases</td>
<td>$ 897 million</td>
</tr>
<tr>
<td>2018</td>
<td>4.68 million cases</td>
<td>$1.01 billion</td>
</tr>
</tbody>
</table>

### Scotch Whisky

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>9.44 million cases</td>
<td>$2.01 billion</td>
</tr>
<tr>
<td>2015</td>
<td>9.58 million cases</td>
<td>$2.09 billion</td>
</tr>
<tr>
<td>2016</td>
<td>9.55 million cases</td>
<td>$2.15 billion</td>
</tr>
<tr>
<td>2017</td>
<td>9.28 million cases</td>
<td>$2.16 billion</td>
</tr>
<tr>
<td>2018</td>
<td>9.51 million cases</td>
<td>$2.30 billion</td>
</tr>
</tbody>
</table>
The following are the leading brands of whiskey in the U.S., ranked by number of cases shipped (source: The Beverage Information Group):

**American Bourbon and Straight Whiskey**
- Jack Daniel’s: 5.23 million cases
- Jim Beam family: 4.96 million cases
- Evan Williams: 2.43 million cases
- Makers Mark (incl. 46): 1.68 million cases
- Bulleit: 1.19 million cases
- Wild Turkey: 658,000 cases
- Early Times: 493,000 cases
- Woodford Reserve SBL: 459,000 cases
- Ten High: 445,000 cases
- Knob Creek: 420,000 cases

**Canadian Whisky**
- Crown Royal: 5.24 million cases
- Black Velvet: 2.00 million cases
- Canadian Mist: 1.22 million cases
- Canadian Club: 1.21 million cases
- Rich & Rare: 943,000 cases
- Windsor Supreme: 846,000 cases
- Seagram’s V.O.: 748,000 cases
- Canadian LTD: 643,000 cases

**Irish Whiskey**
- Jameson: 2.83 million cases
- Tullamore Dew: 207,000 cases
- Bushmills: 197,000 cases

**Scotch Whisky**
- House of Dewar’s: 1.14 million cases
- Johnnie Walker Black: 990,000 cases
- Johnnie Walker Red: 830,000 cases
- Buchanan: 482,000 cases
- Clan MacGregor: 434,000 cases
- The Glenlivet: 414,000 cases
- Chivas Regal: 333,000 cases

**90.11 Market Resources**
Beverage Information Group, 40 Richards Avenue, Suite 300, Norwalk, CT 06854. (203) 855-8499. (www.beinfogroup.com)
91

WINE

91.1 Market Assessment

According to the Wine Institute (www.wineinstitute.org), wine sales in the U.S. have been as follows:

<table>
<thead>
<tr>
<th>Year</th>
<th>Table Wine</th>
<th>Total Wine</th>
<th>Total Retail Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>287.7 million cases*</td>
<td>328.8 million cases*</td>
<td>$45.6 billion</td>
</tr>
<tr>
<td>2010</td>
<td>291.4 million cases</td>
<td>335.6 million cases</td>
<td>$47.7 billion</td>
</tr>
<tr>
<td>2011</td>
<td>307.6 million cases</td>
<td>356.2 million cases</td>
<td>$50.3 billion</td>
</tr>
<tr>
<td>2012</td>
<td>319.1 million cases</td>
<td>366.9 million cases</td>
<td>$51.7 billion</td>
</tr>
<tr>
<td>2013</td>
<td>326.2 million cases</td>
<td>376.2 million cases</td>
<td>$53.4 billion</td>
</tr>
<tr>
<td>2014</td>
<td>323.4 million cases</td>
<td>377.8 million cases</td>
<td>$56.8 billion</td>
</tr>
<tr>
<td>2015</td>
<td>324.7 million cases</td>
<td>386.6 million cases</td>
<td>$60.5 billion</td>
</tr>
<tr>
<td>2016</td>
<td>332.0 million cases</td>
<td>397.6 million cases</td>
<td>$63.3 billion</td>
</tr>
<tr>
<td>2017</td>
<td>336.1 million cases</td>
<td>403.3 million cases</td>
<td>$65.3 billion</td>
</tr>
<tr>
<td>2018</td>
<td>338.7 million cases</td>
<td>406.5 million cases</td>
<td>$68.1 billion</td>
</tr>
</tbody>
</table>

* 9-liter cases

The 2018 total included 40.4 million cases of sparkling wine/champagne and 27.4 million cases of dessert wine.

Per capita consumption has been as follows (source: Wine Institute):

<table>
<thead>
<tr>
<th>Year</th>
<th>Consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>2.54 gallons</td>
</tr>
<tr>
<td>2010</td>
<td>2.58 gallons</td>
</tr>
<tr>
<td>2011</td>
<td>2.72 gallons</td>
</tr>
<tr>
<td>2012</td>
<td>2.78 gallons</td>
</tr>
<tr>
<td>2013</td>
<td>2.83 gallons</td>
</tr>
<tr>
<td>2014</td>
<td>2.82 gallons</td>
</tr>
<tr>
<td>2015</td>
<td>2.86 gallons</td>
</tr>
<tr>
<td>2016</td>
<td>2.93 gallons</td>
</tr>
<tr>
<td>2017</td>
<td>2.94 gallons</td>
</tr>
<tr>
<td>2018</td>
<td>2.95 gallons</td>
</tr>
</tbody>
</table>

* Based on all wine types including sparkling wine, dessert wine, vermouth, other special natural and table wine, using Bureau of the Census resident population. Per capita consumption will be higher if based on legal drinking age population.

In 2018, the distribution of the U.S. table wine market by origin was as follows:

- California: 61%
- Imported: 33%
- Other states: 6%
“California wine shipments in the U.S. reached an estimated retail value of $40.2 billion in 2018, up 3% from the previous year. The state shipped 248 million nine-liter cases within the U.S. in 2018, up 3%.”

Wine Institute, 6/24/19

Over 70% of wine purchased for consumption at home is purchased in liquor stores or wine shops, according to Nielsen (www.nielsen.com).

Distribution of varietals by off-premise volume share is as follows (source: Nielsen):

- Chardonnay: 18.6%
- Cabernet Sauvignon: 14.6%
- Red Blends: 10.6%
- Pinot Grigio/Gris: 9.7%
- Merlot: 6.4%
- Moscato/Muscat: 6.2%
- Pinot Noir: 5.2%
- Sauvignon Blanc: 5.1%
- White Zinfandel/Blush: 3.6%
- Rose: 2.7%

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).

### 91.2 Market Leaders

According to Beverage Information Group (www.bevinfogroup.com), the leading brands of table wine, ranked by annual sales of 9-liter case equivalents in 2018, were as follows:

**Table Wine**

- Franzia Winetaps: 25.17 million cases
- Barefoot Cellars: 16.42 million cases
- Carlo Rossi: 11.89 million cases
- Sutter Home: 9.88 million cases
- Woodbridge by Robert Mondavi: 9.15 million cases
- Twin Valley: 9.10 million cases
• Yellow Tail: 8.30 million cases
• Peter Vella: 7.05 million cases
• Beringer: 5.61 million cases
• Livingston Cellars: 5.43 million cases

Sparkling Wine
• Andre/Wycliff: 3.43 million cases
• Cook’s: 1.97 million cases
• La Marca Prosecco: 1.50 million cases
• Korbel: 1.47 million cases
• Barefoot Bubbly: 1.34 million cases
• Verdi Spurante: 1.19 million cases

Champagne
• Veuve Clicquot: 405,000 cases
• Moët & Chandon: 370,000 cases

91.3 Wine Sales In Groceries
IRI (www.iriworldwide.com) reported wine sales at U.S. supermarkets, drug stores, gas and convenience stores, mass merchandisers, military commissaries, and select club and dollar retail chains for the 52 weeks ending May 19, 2019, at $10.57 billion, a 1.8% increase from 12 months prior.

2019 State of the Beverage Industry, published by Beverage Industry and based on data from IRI, ranked market leaders as follows:
• Barefoot Cellars: $669 million
• Sutter Home: $389 million
• Woodbridge by Robert Mondavi: $347 million
• Franzia Box: $346 million
• Yellow Tail: $264 million
• Black Box: $244 million
• Josh Cellars: $206 million
• Kendall Jackson: $202 million
• Apothic: $194 million
• Chateau Ste. Michelle: $186 million

91.4 Wine Consumer Characteristics
According to 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%

### 91.5 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.

91.6 Market Resources
Wine Institute, 425 Market Street, Suite 1000, San Francisco, CA 94105.
(415) 512-0151. (www.wineinstitute.org)

Wine Market Council, 1734 Saint Andrews Court, St. Helena, CA 94574.
(707) 812-1919. (www.winemarketcouncil.com)
92

CARBONATED SOFT DRINKS

92.1 Consumption

Consumption of carbonated soft drinks (CSD) has experienced 12 consecutive years of decline. Still, even with declining consumption, CSDs rank as #1 in the U.S. liquid refreshment beverage market, accounting for about 35% of all nonalcoholic beverages (by volume) consumed, excluding tap water.

According to Beverage Marketing Corporation (www.beveragemarketing.com), per capita U.S. CSD consumption has been as follows (change from prior year in parenthesis):

• 2009: 45.3 gallons (-3.0%)
• 2010: 44.5 gallons (-1.8%)
• 2011: 43.3 gallons (-2.7%)
• 2012: 42.2 gallons (-2.5%)
• 2013: 40.6 gallons (-3.8%)
• 2014: 39.8 gallons (-2.0%)
• 2015: 38.9 gallons (-2.3%)
• 2016: 38.4 gallons (-1.3%)
• 2017: 37.6 gallons (-2.1%)
• 2018: 37.2 gallons (-1.1%)

“As consumers’ beverage choices have shifted, the carbonated soft drinks market has taken one of the largest hits.”

2019 State Of The Beverage Industry
Beverage Industry, 6/19

92.2 Market Assessment

IRI (www.iriworldwide.com) reported carbonated beverage sales at U.S. supermarkets, drug stores, gas and convenience stores, mass merchandisers, military
commissaries, and select club and dollar retail chains for the 52 weeks ending November 2, 2018, at $18.88 billion.

92.3 Market Leaders

2019 State of the Beverage Industry, published by Beverage Industry and based on data from Beverage Marketing Corporation, ranked carbonated soft drink market leaders by share of volume as follows:

- Coca-Cola: 18.6%
- Pepsi Cola: 9.1%
- Diet Coke: 8.0%
- Dr Pepper: 7.5%
- Sprite: 7.2%
- Mountain Dew: 7.0%
- Diet Pepsi: 3.5%
- Coke Zero: 2.8%
- Fanta: 2.4%
- Diet Mountain Dew: 2.1%

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)

92.4 Heavy Soft Drink Consumers

Among all U.S. adults, 11% are heavy soft drink consumers, defined as those consuming 10 or more soft drinks per week.

According to The Media Audit (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%
93

FUNCTIONAL BEVERAGES

93.1 Energy Drinks

IRI (www.iriworldwide.com) reported energy drink sales at U.S. supermarkets, drug stores, gas and convenience stores, mass merchandisers, military commissaries, and select club and dollar retail chains at $11.64 billion for the 52 weeks ending May 19, 2019. Energy shots sales were $1.05 billion. Year-over-year growth for energy drinks were 11.3%; sales of energy shots were flat.

“Function, flavor and convenience remain key growth drivers in the energy drinks and shots category, but after many years of growth, the performance of the energy shots segment has flattened out.”

2019 State Of The Beverage Industry
Beverage Industry, 6/19

The following are the top-selling energy beverage products (source: IRI): Energy Drinks
- Red Bull: $2.90 billion
- Monster Energy: $1.76 billion
- Red Bull Sugar Free: $782 million
- Monster Energy Zero: $689 million
- VPX Bang: $615 million
- Nos: $455 million
- Monster Energy Lo-Carb: $278 million
- Monster Mega Energy: $236 million
- Red Bull Blue Edition: $226 million
- Red Bull Yellow Edition: $209 million
Energy Shots
- 5 Hour Energy: $947 million
- Tweaker: $20 million
- Stacker 2 Extra: $16 million
- Private label: $13 million

93.2 Sports Drinks

According to Packaged Facts (www.packagedfacts.com), 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.

The sports drink market hit a sudden decline in sales in 2017 after achieving strong growth in previous years but rebounded somewhat in 2018.

“As beverage blurring continues, the sports drink market faces stiff competition from other beverage categories. Market analysts remain mixed about the performance beverage category's ability to regain positioning as more factions have emerged within the beverage market.”

2019 State Of The Beverage Industry
Beverage Industry, 6/19

According to IRI, retail sales of sports drinks were $6.58 billion for the 52 weeks ending May 19, 2019, a 5.8% increase from 12 months prior. The top-selling sports drinks were as follows:
- Gatorade Perform: $1.85 billion
- Gatorade: $950 million
- Gatorade Frost: $859 million
- Powerade Ion4: $747 million
93.3 Functional Water

Appealing to health-conscious consumers, numerous functional water products have been introduced. The following are some of these products:

- 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 (WTRMLN WTR, www.wttmlnwtr.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_

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93.4 Protein Drinks

Athletes, bodybuilders, and recreational participants are the traditional consumers of protein drinks. Healthy adults should get about 45 to 56 grams of protein a day and generally can get enough protein from foods. People engaged in sports and
recreation may need more calories and protein and often turn to supplements. Protein drinks are also used by people that want to lose body fat.

Euromonitor (www.euromonitor.com) assessed the 2018 ready-to-drink (RTD) protein market at $825 million.

93.5 Cannabis-Infused Beverages
Cannabis-infused beverages are sold in states that have authorized recreational marijuana. As of July 2019, the sale of recreational marijuana was legal in 11 states and the District of Columbia. The states are as follows:

- Alaska
- California
- Colorado
- Illinois
- Maine
- Massachusetts
- Michigan
- Nevada
- Oregon
- Vermont
- Washington

According to Headset (www.headset.io), an analytics service provider for the cannabis industry, legal marijuana sales in the U.S. were $10.4 billion in 2018. Approximately 1% of spending was for infused beverages.

Relaxation is the leading reason for consumption of both cannabis and alcohol, pitting the two markets as competitors. Thirty-four percent (34%) of cannabis users say they’ve reduced alcohol consumption since legalization.

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“While a significantly smaller number of consumers use cannabis than drink alcohol, staving off sales losses will require alcohol players to be mindful of the competitive threat. Cannabis is more likely peeling away some consumption occasions from alcohol rather than converting consumers wholesale. On the other hand, cannabis can facilitate social interactions that bring people together and because of this could generate some additional beverage alcohol occasions, as cannabis is not for all.”

Beverage Industry, 5/21/19

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According to Mintel (www.mintel.com), only 8% of non-alcoholic beverage drinkers would be persuaded to choose a drink due to the inclusion of CBD. However, the importance of functionality in the non-alcoholic beverage market suggests that interest may grow, especially considering that 38% of consumers would be persuaded to choose a drink with calming/relaxing properties – this is second only to an interest in hydration.

93.6 Relaxation Beverages

With the market for energy drinks hitting a plateau in sales, beverage suppliers are hoping to develop another functional beverage market: relaxation drinks.

“Can relaxation, a good night’s sleep or happiness come from a lightly carbonated, berry-flavored beverage? Consumers are warming up to drinks that could fill the chasm between taking medication for anxiety or sleep problems and doing nothing.”

*The Wall Street Journal*

Relaxation beverage products include Just Chill from Chill Group Inc. (www.drinkjustchill.com), Marley’s Mellow Mood from Marley Beverage Company (www.drinkmarley.com), and Neuro Bliss and Neuro Sleep from Neuro Drinks (www.drinkneuro.com).

The market is in its infancy, with total annual sales estimated at less than $100 million.

93.7 Drinkable Meals

Hybrid food/drink products, dubbed drinkable meals, have become popular among high-tech workers in Silicon Valley.

Soylent (www.soylent.com), the first and most popular among meal replacement products, was created by a California entrepreneur with the belief that eating is an inefficient use of time. Ambronite (www.ambronite.com) followed in the marketplace. 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), Schmilek (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.
94.1 Overview

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.

“Sales of traditional juice and juice drinks have been declining for several years as consumers seek to reduce sugar consumption and are foregoing traditional at-home breakfasts, which often featured orange juice as a staple. The good news, however, is that other cutting-edge juice segments have been growing. On the consumer front, growth drivers include demand for juices with less sugar, an overall desire for healthier beverage options containing superfood and functional ingredients, and (especially for adult Millennials), a quest for more authentic juice products, notably include fresh juices.”

2019 State Of The Beverage Industry
Beverage Industry, 6/19
94.2 Market Assessment

IRI (www.iriworldwide.com) reported sales of juice and fruit drinks at U.S. supermarkets, drug stores, gas and convenience stores, mass merchandisers, military commissaries, and select club and dollar retail chains for the 52 weeks ending May 19, 2019 as follows:

- Shelf-stable bottled juice: $7.09 billion
- Refrigerated orange juice: $2.84 billion
- Refrigerated juice and juice drink smoothies: $ 801 million
- Aseptic-packaged juice: $ 468 million

94.3 Shelf-Stable Bottled Juice

Sales of shelf-stable bottled juice for the 52 weeks ending November 4, 2018, were as follows (source: IRI):

- Fruit drinks: $2.36 billion
- Cranberry cocktail/fruit drinks: $1.00 billion
- Apple juice: $ 905 million
- Tomato/vegetable juice/cocktail: $ 450 million
- Lemonade: $ 383 million
- Fruit juice blends: $ 319 million
- Cranberry juice/ blends: $ 279 million
- Orange juice: $ 246 million
- Grape juice: $ 225 million
- Lemon/lime juice: $ 197 million
- Sparkling juice: $ 155 million
- Cider: $ 114 million
- Other fruit juice: $ 103 million
- Prune/fig juice: $ 101 million
- Cherry juice: $ 61 million
- Grapefruit cocktail: $ 48 million
- Pineapple juice: $ 42 million
- Grapefruit juice: $ 35 million
- Juice and drink smoothies: $ 28 million
- Fruit nectar: $ 14 million

94.4 Market Leaders

According to IRI, the following are the leading orange juice brands sold at supermarkets, drug stores, convenience stores, and mass merchandisers:

Aseptic-Packaged Juice

- Vita Coco: $180 million
- Juicy Juice: $ 53 million
- Apple & Eve: $ 50 million
• Capri Sun: $ 33 million
• Minute Maid: $ 29 million

**Refrigerated Juice and Fruit Drink Smoothies**
• Naked: $522 million
• Bolthouse Farms: $152 million
• Odwalla: $ 30 million
• Dannon D’Animals: $ 19 million
• Naked Protein Zone: $ 16 million

**Refrigerated Orange Juice**
• Tropicana Pure Premium: $899 million
• Simply Orange: $713 million
• Private label: $524 million
• Florida’s Natural: $258 million
• Minute Maid Premium: $188 million
COFFEE

95.1 Consumption

Americans consumed approximately 7.2 billion gallons of coffee in 2018. 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

Seventy-nine percent (79%) of Americans drink coffee – 63% drink it every day and 71% do so at least weekly – according to National Coffee Data Trends 2019, by the National Coffee Association (NCA, www.ncausa.org). Sixty-one percent (61%) 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 daily ‘cup of Joe’ recently has taken on a new meaning as consumers now are trending toward crafted and tasteful, yet highly caffeinated forms of coffee. Ready-to-drink (RTD) coffees, including cold-brew varieties, seem to be appealing to consumers who wish to stay energized in their day-to-day lives.”

2019 State Of The Beverage Industry
Beverage Industry, 6/19
95.2 Consumption Demographics

According to the National Coffee Association, the percentages of adults that consume coffee each day are 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. NCA 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.

95.3 Market Assessment

According to the National Coffee Association, annual consumer spending for coffee in the U.S. is $74.2 billion.

The Specialty Coffee Association of America (www.scaa.org) estimates that specialty coffee comprises approximately 48% volume share and nearly 55% value share.

A February 2019 survey by Datassential (www.datassential.com) asked adult coffee drinkers their favorite specialty coffee flavors. Responses were as follows (ranked by percentage of respondents that rated each flavor in the top two):
- Vanilla: 45%
- Carmel/dulce de leche: 45%
- Chocolate/mocha: 44%
- Hazlenut: 36%
- Irish cream: 29%
- Pumpkin/pumpkin spice: 28%
- Toffee: 28%

95.4 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. The share of U.S. households that used a single-cup brewer has been as follows (source: NCA):
- 2011: 7%
- 2012: 10%
- 2013: 12%
- 2014: 15%
- 2015: 27%
- 2016: 29%
- 2017: 32%
- 2018: 41%
So popular are the machines that they are influencing overall coffee demand in the U.S.

“Single-serve brewing machines are altering the way coffee is consumed, and not in a good way. For coffee producers, the problem with single-serve machines is their efficiency. That means fewer people brew big pots of coffee and dump what they don’t drink, hurting sales.”

Bloomberg Businessweek

Daily consumption of a coffee made in a drip coffee maker dropped to 37% from 43% in 2010.

95.5 Coffee Sales In Groceries

IRI (www.iriworldwide.com) reported coffee sales at U.S. supermarkets, drug stores, gas and convenience stores, mass merchandisers, military commissaries, and select club and dollar retail chains for the 52 weeks ending May 19, 2019 as follows:

- Single-cup coffee: $4.23 billion
- Ground coffee: $3.99 billion
- Bottled RTD coffee: $2.09 billion
- Refrigerated RTD coffee: $405 million

2019 State of the Beverage Industry, published by Beverage Industry and based on data from IRI, ranked market leaders as follows:

Bottled RTD Coffee
- Starbucks Frappuccino: $1.27 billion
- Starbucks Doubleshot: $604 million
- Starbucks Cappucino: $118 million
- Starbucks Frappuccino Light: $39 million
- Starbucks Doubleshot Light: $17 million
- Illy Issimo: $11 million
- Coco Cafe: $11 million

Ground Coffee
- Folgers: $1.03 billion
- Maxwell House: $475 million
• Starbucks: $461 million
• Private label: $442 million
• Dunkin’ Donuts: $298 million

Refrigerated RTD Coffee
• Starbucks: $85 million
• International Delight: $75 million
• Stok: $73 million
• Starbucks Iced Espresso Classics: $60 million
• Califia Farms: $34 million

Single-Cup Coffee
• Private label: $949 million
• Starbucks: $707 million
• Keurig Green Mountain: $420 million
• Dunkin’ Donuts: $333 million
• Keurig Donut Shop: $229 million

95.6 Coffeeshops
Coffeeshops are assessed in Chapter 33.

95.7 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.

95.8 Market Resources

Specialty Coffee Association of America, 117 W. 4th Street, Suite 300, Santa Ana, CA 92701. (562) 624-4100. ([www.scaa.org](http://www.scaa.org))
96

TEA

96.1 Consumption

Americans consume over 55 billion servings of tea, or over 2.50 billion gallons, each year. According to Mintel (www.mintel.com), 79% of U.S. adults drink tea, 60% drink ready-to-drink (RTD) options, and 49% drink bagged/loose-leaf varieties. According to the Tea Association of the USA (www.teausa.com), 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.; RTD and iced tea mixes comprise about one fourth.

The U.S. imports approximately 300 million pounds of tea annually, according to the Tea Association of the USA.

96.2 Market Assessment

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 by the Tea Association of the USA, estimated the U.S. 2018 wholesale tea market at $12.7 billion, distributed as follows:

- Ready-to-drink (RTD): $6.2 billion
- Retail: $2.3 billion
- Specialty segment: $2.6 billion
- Foodservice: $1.6 billion

Mintel estimated 2018 retail sales of tea and RTD tea at $8 billion.
U.S. Beverage Market Outlook 2019, by Package Facts (www.packagedfacts.com) estimated that total retail dollar sales of the U.S. tea and RTD tea category market at $8.3 billion in 2018, with sales increasing at a compound annual growth rate (CAGR) of 3.8% since 2013.

IRI (www.iriworldwide.com) reported tea sales at U.S. supermarkets, drug stores, gas and convenience stores, mass merchandisers, military commissaries, and select club and dollar retail chains for the 52 weeks ending May 19, 2019 as follows:

- Canned and bottled tea: $3.98 billion
- Refrigerated tea: $1.67 billion
- Loose-leaf and bagged tea: $1.20 billion

96.3 Market Leaders

2019 State of the Beverage Industry, published by Beverage Industry and based on data from IRI, ranked market leaders as follows:

Canned and Bottled Tea

- Lipton Pure Leaf: $720.0 million
- AriZona: $567.4 million
- Gold Peak: $403.3 million
- Lipton Brisk: $365.6 million
- Monster Rehab: $288.4 million

Loose-Leaf and Bagged Tea

- Lipton: $215.7 million
- Bigelow: $172.8 million
- Private Label: $95.3 million
- Celestial Seasonings: $84.8 million
- Twinings of London: $79.1 million

Refrigerated Tea

- Private label: $258.7 million
- Gold Peak: $205.7 million
- Milos: $164.0 million
- GTS Kombucha Synergy: $153.2 million
- Red Diamond: $133.8 million

94.4 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 32,000 coffeeshops in the U.S. and Starbucks operates over 14,600 locations.
In 2013, Starbucks acquired the 300-unit Teavana retail tea brand for $620 million. All locations were closed in 2018.

The Coffee Bean & Tea Leaf operates over 1,000 self-owned and franchised stores in the U.S. and 24 countries.

Jamba Juice, which invested in Talbott Tea, a premium tea brand, sells hot and cold tea at its 800+ U.S. locations.

### 96.5 Market Resources

Tea Association of the USA, 362 Fifth Avenue, Suite 801, New York, NY 10001.
(212) 986-9415.  (www.teausa.com)
97

BOTTLED WATER

97.1 Market Assessment

According to Beverage Marketing Corporation (www.beveragemarketing.com), bottled water sales volume and producer revenues have been as follows (change from prior year in parenthesis):

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
<th>Producer Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>8.32 million</td>
<td>$10.86 billion (-5.0%)</td>
</tr>
<tr>
<td>2010</td>
<td>8.61 million</td>
<td>$11.13 billion (2.5%)</td>
</tr>
<tr>
<td>2011</td>
<td>8.95 million</td>
<td>$11.30 billion (1.5%)</td>
</tr>
<tr>
<td>2012</td>
<td>9.93 million</td>
<td>$12.16 billion (7.6%)</td>
</tr>
<tr>
<td>2013</td>
<td>9.99 million</td>
<td>$12.71 billion (4.5%)</td>
</tr>
<tr>
<td>2014</td>
<td>10.71 million</td>
<td>$13.53 billion (6.5%)</td>
</tr>
<tr>
<td>2015</td>
<td>11.52 million</td>
<td>$14.72 billion (8.9%)</td>
</tr>
<tr>
<td>2016</td>
<td>12.44 million</td>
<td>$16.02 billion (8.8%)</td>
</tr>
<tr>
<td>2017</td>
<td>13.20 million</td>
<td>$17.12 billion (6.9%)</td>
</tr>
<tr>
<td>2018</td>
<td>13.85 million</td>
<td>$18.36 billion (7.3%)</td>
</tr>
</tbody>
</table>

Distribution by volume in 2018 was as follows:

- PET*: 69.7%
- Direct/bulk delivery: 10.2%
- 1.0 - 2.5 gallon multi-service: 8.4%
- Self-service refill: 7.1%
- Domestic sparkling: 2.7%
- Imports: 1.9%

* Polyethylene terephthalate plastic bottled water packaging

Bottled water sales in supermarkets, drug stores, and mass merchandisers were $10.8 billion in 2018, according to IRI (www.iriworldwide.com).

Annual convenience store sales of bottled water are $2.9 billion, according to The Nielsen Company (www.nielsen.com).

97.2 Consumption

According to Beverage Marketing Corporation, per capita consumption of bottled water has been as follows (change from prior year in parenthesis):
2009: 27.2 gallons (-3.2%)
2010: 27.8 gallons (2.5%)
2011: 28.7 gallons (3.3%)
2012: 30.4 gallons (5.7%)
2013: 31.6 gallons (4.0%)
2014: 33.6 gallons (6.4%)
2015: 35.9 gallons (8.8%)
2016: 38.5 gallons (7.1%)
2017: 40.6 gallons (5.4%)
2018: 42.3 gallons (4.3%)

In a 2019 survey by The Harris Poll (www.theharrispoll.com), conducted for IBWA, 72% of adults said that bottled water is among their most preferred non-alcoholic beverages, ahead of coffee (61%) and soft drinks (59%).

Eighty-nine percent (89%) drink bottled water while they travel, 82% of employed adults drink it at work, and 75% of all people drink it at home.

When asked to compare their consumption of bottled water and tap/filtered water, responses were as follows:
- Drink only bottled water: 16%
- Drink mostly bottled water: 21%
- Drink bottled water and tap/filtered water equally: 37%
- Drink mostly tap/filtered water: 16%
- Drink only tap/filtered water: 10%

According to The Media Audit (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%

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%
97.3 Market Leaders

The marketshare leaders in the U.S. bottled water market are as follows:

- Nestlé Waters North America (www.nestle-watersna.com), which owns Acqua Panna, Arrowhead, Calistoga, Contrex, Deer Park, Ice Mountain, Nestlé Pure Life, Ozarka, Perrier, Poland Spring, San Pellegrino, and Zephyrhills
- Dasani (www.dasani.com) and Glacéau (www.glaceau.com), owned by The Coca-Cola Company
- Aquafina (www.aquafina.com), owned by PepsiCo

IRI reported 2018 sales* of bottled waters as follows (change from prior year in parenthesis):

**PET/Still Bottled Water**

- Private label: $2.78 billion (0.9%)
- Dasani: $1.09 billion (-0.4%)
- Aquafina: $1.07 billion (-0.6%)
- Nestlé Pure Life: $857 million (-0.8%)
- Glacéau Smartwater: $836 million (-0.3%)

**Sparkling/Mineral/Seltzer Water**

- Private label: $529 million (-1.0%)
- La Croix: $442 million (2.6%)
- Sparkling Ice: $401 million (-1.3%)
- Perrier: $278 million (-0.6%)
- Polar: $160 million (0.2%)

* Includes sales at supermarkets, drug stores mass merchandisers, convenience stores, and military commissaries.

97.4 Market Resources

International Bottled Water Association, 1700 Diagonal Road, Suite 650, Alexandria, VA 22314. (703) 683-5213. (www.bottledwater.org)
98.1 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 2018, and, for comparison, 10 years prior, as follows:

<table>
<thead>
<tr>
<th>Product</th>
<th>2008</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fluid milk</td>
<td>179.0</td>
<td>149.0</td>
</tr>
<tr>
<td>Cheese (all types)</td>
<td>34.4</td>
<td>39.1</td>
</tr>
<tr>
<td>Ice cream and other frozen products</td>
<td>24.5</td>
<td>23.1</td>
</tr>
<tr>
<td>Yogurt</td>
<td>11.7</td>
<td>13.7</td>
</tr>
<tr>
<td>Evaporated and condensed milk</td>
<td>7.5</td>
<td>6.8</td>
</tr>
<tr>
<td>Dry milk products</td>
<td>6.3</td>
<td>5.7</td>
</tr>
<tr>
<td>Butter</td>
<td>5.0</td>
<td>5.7</td>
</tr>
</tbody>
</table>

Total farm milk production in the U.S. has bees as follows:

- 2016: 212.4 billion pounds  
- 2017: 215.5 billion pounds  
- 2018: 217.5 billion pounds

The Dairy Farmers of America (www.dfamilk.com), a dairy marketing cooperative owned by 13,000 dairy farmers across the U.S., sells more than 50 billion pounds of milk annually for its members.

98.2 Market Assessment

_Bloomberg Businessweek_ (January 2019) estimated the U.S. dairy industry at $200 billion.
According to IRI (www.iriworldwide.com), annual milk sales in supermarkets, drug stores, and mass merchandisers in 2018 were $14.3 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.

**98.3 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%

**98.4 Dairy Alternatives**

Soy & Almond Milk Production in the US: Market Research Report, published in 2019 by IBISworld (www.ibisworld.com), estimated annual sales of soy milk and almond milk at $2.3 billion, with a 4.6% average annual growth rate for 2013 through 2018. Almond milk, which displaced soy milk as the marketshare leader in the segment in 2013, garners 68% of sales.

Rice milk and coconut milk rank third and fourth, respectively, in the dairy alternative segments, each with a 3% to 5% marketshare.

Cashews, flax, hazelnuts, lupine, peanuts, peas, pecans, quinoa, and sesame seeds are also used to make plant-based milks.

"Operators have thrived as U.S. consumers have become more health conscious. Additionally, an increase in per capita disposable income made consumers more willing to spend money on healthy food and drinks."

IBISworld, 2/19
IRI reported almond and soy milk sales at U.S. supermarkets, drug stores, gas and convenience stores, mass merchandisers, military commissaries, and select club and dollar retail chains for the 52 weeks ending May 19, 2019 as follows:

- Almond milk: $1.23 billion
- Soy milk: $187 million

Market leaders are as follows (source: IRI):

**Almond Milk**
- Blue Diamond: $493 million
- Silk: $423 million
- Private label: $224 million
- Califia Farms: $84 million
- Hiland: $4 million

**Soy Milk**
- Silk: $145 million
- Private label: $35 million
- 8th Continent: $5 million

### 98.5 Market Resources


97

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 2019 are estimated at $285.3 billion; beverage sales accounted for approximately $59.9 billion. At quick-service restaurants, beverages account for approximately 4% of the average customer check. Of the $246.7 billion in estimated total sales in 2019, quick-service restaurants are projected to sell an estimated $9.9 billion in beverages. These figures do not include beverage sales at bars and taverns, coffeeshops, or snack bars.

Including bars, taverns, coffeeshops, snack bars, and other foodservice categories, beverages account for $181 billion in annual sales; 113 billion servings are sold annually according to Technomic (www.technomic.com).

“Beverages are playing a key role in the foodservice segment’s growth. They account for $1 of every $5 consumers spend away from home. They are a critical part of the experience”

David Henkes, Senior Principal
Technomic
Beverage Industry, 7/12/18

According to Technomic, sales of spirits, wine, and beer in restaurants, bars, and other licensed on-premise locations were approximately $140 billion. Adult beverage on-premise spending is increasing at about 5% per year. The 2018 Beverage Consumer Trend Report, by Technomic, reported that 71% of adults purchase beverages away from home at least twice a week; 39% purchase four or more beverages a week from foodservice establishments.

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.) Customers order a beverage 70% of the time when visiting restaurants and other foodservice outlets.

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.

Consumers are showing an interest in non-alcohol craft beverage innovations. According to Mintel’s Beverage Tracker, away-from-home consumption of CSDs dipped 1 percentage point in 2018, but consumption of natural and craft sodas and fruit water each increased 4 percentage points.

An example of the emphasis on craft beverages is offerings at Panera Bread. In 2018, the 2,074-unit chain rolled out a beverage menu that includes unsweetened Iced Black Tea, unsweetened Plum Ginger Hibiscus Tea, naturally sweetened Prickly Pear Hibiscus Fresca, Passion Papaya Green Tea, Blood Orange Lemonade and Agave Lemonade. The beverages do not contain artificial sweeteners, flavors, colors, or preservatives; many do not contain any added sugar.
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>Restaurants</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>

The mix of beverages shifts for upscale dining. Malcolm M. Knapp Inc. (www.malcolmknapp.com) assesses the distribution of upscale casual-dining restaurant alcoholic beverage sales as follows:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cocktails</td>
<td>46%</td>
</tr>
<tr>
<td>Beer</td>
<td>31%</td>
</tr>
<tr>
<td>Wine</td>
<td>24%</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 offer beer at a few locations but have not expanded the offering chain-wide. Starbucks has over 100 locations serving alcohol.

Several fast-casual restaurants chains offer alcoholic beverage service. Chipotle Mexican Grill serves beer and margaritas at most of its 2,452 locations. Noodles & Company, a 459-unit chain, sells beer and wine. Moe’s Southwest Grill sells beer and wine at about 90 of its 727 units. Smashburger serves beer at more than 90% of its 322 U.S. locations. Baja Fresh Mexican Grill (135 locations) and Qdoba Mexican Grill (743 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.

### 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.
According to the 2018 Beverage Consumer Trend Report, by Technomic, 23% of adults said that non-alcoholic beverages are very important when deciding where to dine, an increase from 18% two years prior.

“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
PART XII: AWARD WINNERS
CONSUMER PICKS

100.1 Overview
Since 2011, Nation’s Restaurant News has annually polled consumers across the U.S. about their attitudes toward restaurant chain brands. The survey ranks brands by True Loyalty, assessing whether a brand is drawing customers for a real desire to visit the brand as opposed to convenience.

The survey is conducted by Datassential (www.datassential.com).

100.2 Top Brands In True Loyalty
The 8th annual survey, conducted in October 2018, ranked the Top 50 brands as follows:

- In-N-Out Burger: 63%
- La Madeline French Bakery: 58%
- Papa Murphy’s: 58%
- Chick-fil-A: 56%
- Shane’s Rib Shack: 56%
- Ruth Chris Steakhouse: 55%
- Newk’s Eatery: 54%
- Whataburger: 54%
- Maggiano’s Little Italy: 53%
- Red Lobster: 53%
- Buca di Beppo: 52%
- Farmer Boys Restaurant: 52%
- Culver’s: 51%
- Freshii: 51%
- Krispy Kreme: 51%
- Luby’s: 51%
- Taco Bueno: 51%
- Texas Roadhouse: 51%
- Chipotle: 50%
- Cracker Barrel: 50%
- Raising Cane’s: 50%
- Saladworks: 49%
- The Capital Grill: 49%
- Bonefish Grill: 48%
- Cafe Rio: 48%
100.3 Favorites By Menu Item

The top restaurant brands by menu item are as follows:

- **Burgers**
  - Limited service: In-N-Out Burger
  - Full service: Red Robin
- **Cold sandwiches**
  - Limited service: Jersey Mike’s
  - Full service: World of Beer
- **Desserts**
  - Limited service: Cold Stone Creamery
  - Full service: The Cheesecake Factory
- **French fries**
  - Limited service: Five Guys
  - Full service: Red Robin
- **Hot sandwiches**
  - Limited service: Chick-fil-A
  - Full service: Cheddar’s Scratch Kitchen

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• 442 •
• Pasta
  - Limited service: Noodles & Company
  - Full service: Maggiano’s Little Italy
• Pizza
  - Limited service: Papa Murphy’s
  - Full service: Uno Pizzeria
• Salads
  - Limited service: Panera Bread
  - Full service: Olive Garden
• Seafood entrees
  - Limited service: Captain D’s Seafood Kitchen
  - Full service: Red Lobster

100.4 Market Resources
Datassential, 18 S. Michigan Avenue, Chicago, IL 60603. (312) 655-0622.
(www.datassential.com)
101

CONSUMERS’ CHOICE AWARDS

101.1 Overview
Technomic (www.technomic.com) presents annual Chain Restaurant Consumers’ Choice Awards. The awards were first presented in 2013. Winners in five categories in three segments are recognized, as follows:

- Best Takeout Experience
- Best Use of Technology
- Most Loyal Customers
- Most Kid Friendly
- Consumer’s Choice – Best Overall

The 2018 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 2018

Best Takeout Experience
- Fast Casual: Five Guys Burgers and Fries
- Full-Service: Olive Garden
- Quick Service: In-N-Out Burger

Best Use of Technology
- Fast Casual: Panera Bread
- Full-Service: Red Robin Gourmet Burgers and Brews
- Quick Service: Marco’s Pizza

Most Loyal Customers
- Fast Casual: Raising Cane’s Chicken Fingers
- Full-Service: LongHorn Steakhouse
- Quick Service: Whataburger

Most Kid Friendly
- Fast Casual: Newk’s Eatery
- Full-Service: Texas Roadhouse
- Quick Service: Chick-fil-A
Consumer’s Choice – Best Overall

• Fast Casual: Newk’s Eatery
• Full-Service: Fleming’s Prime Steakhouse & Wine Bar
• Quick Service: Chick-fil-A

101.3 Market Resources
Technomic, Inc., 300 South Riverside Plaza, Suite 1200 South, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)
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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)
• SideBerns (Tampa)
• Smith & Wollensky (Miami Beach)
• Square One Restaurant (Key West)
• Ta-boo’ Restaurant (Palm Beach)
• Tantra Restaurant and Lounge (Miami Beach)
• The Black Pearl (Dunedin)
• The Boheme (Orlando)
• The Colony Dining Room (Longboat Key)
• The Flagler Steakhouse (Palm Beach)
• The Forge (Miami Beach)
• Vito’s Chop House (Orlando)

Georgia
• Aqua Blue (Norcross)
• Aria (Atlanta)
• Bone’s Restaurant (Atlanta)
• Hi Life Restaurant (Norcross)
• La Grotta Ristorante Italiano (Atlanta)
• Local 11ten Food and Wine (Savannah)
• Murphy’s (Atlanta)
• Nikolai’s Roof at The Hilton Atlanta (Atlanta)
• Sapphire Grill (Savannah)
• South City Kitchen Midtown (Atlanta)
• The Olde Pink House Restaurant (Savannah)

Hawaii
• Alan Wong’s Restaurant (Honolulu)
• Bali by the Sea (Honolulu)
• Cafe’ Portofino (Lihue)
• La Mer (Honolulu)
• Pahu i’a (Kailua-Kona)

Idaho
• Beverly’s (Coeur d’Alene)
Illinois
• Carlucci (Rosemont)
• Chicago Chop House (Chicago)
• 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, 3909 Witmer Road, Suite 181, Niagara Falls, NY 14305. (888) 503-3363. (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.

103.2 Favorites By Segment
In 2019, 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. Tropical Smoothie Cafe
2. Cold Stone Creamery
3. Krispy Kreme Doughnuts

Burger
1. Culver’s
2. In-N-Out Burger
3. Fuddruckers

Chicken
1. Chick-fil-A
2. Raising Cane's Chicken Fingers
3. Zaxby’s

Family-Dining
1. Cracker Barrel Old Country Store
2. First Watch
3. Luby’s
Italian
1. Maggiano’s Little Italy
2. Brio Tuscan Grill
3. Mellow Mushroom

Mexican
1. Pappasito’s Cantina
2. Moe’s Southwest Grill
3. Rubio’s Coastal Grill

Pizza
1. Papa Murphy’s Take N’ Bake
2. Blaze Pizza
3. Marco’s Pizza

Seafood
1. Joe’s Crab Shack
2. Bonefish Grill
3. Red Lobster

Steak
1. Fleming’s Prime Steakhouse
2. The Capital Grille
3. Texas Roadhouse

Varied Menu
1. Seasons 52
2. Cheddar’s Scratch Kitchen
3. The Cheesecake Factory

103.3 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)
FIVE-DIAMOND AWARDS

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 2019:

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)
• Manresa (Los Gatos)
• 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, St. Helena)

Colorado
• The Penrose Room (in The Broadmoor, Colorado Springs)

Connecticut
• Restaurant at Winvian Farm (Morris)

District of Columbia
• Pineapple and Pearls (Washington)
Florida
• Palm d’Or (in The Biltmore Coral Gables, Miami)
• Salt (in the Ritz-Carlton, Amelia Island, Fernandina Beach)
• Victoria & Albert’s (in Disney’s Grand Floridian Resort & Spa, Lake Buena Vista)

Georgia
• The Georgian Room (in The Cloister, Sea Island)

Hawaii
• Chef Mavro (Honolulu)

Illinois
• Acadia (Chicago)
• Alinea (Chicago)
• Oriole (Chicago)

Maine
• The White Barn Inn Restaurant (Kennebunk Beach)

Massachusetts
• Menton (Boston)
• The Portico by Jeffrey Thompson (in the Wheatleigh, Lenox)
• Toppers (in the Wauwinet, Nantucket)

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
• Atera (New York)
• Blue Hill at Stone Barns (Tarrytown)
• Chef’s Table at Brooklyn Fare (Brooklyn)
• 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)
• Marea (New York)
• Per Se (New York)
• The Modern (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)
• Ventri (Philadelphia)

Rhode Island
• Coast (in the Ocean House, Watch Hill)

South Carolina
• McCrady’s (Charleston)

Tennessee
• The Catbird Seat (Nashville)

Virginia
• The Inn at Little Washington Dining Room (Washington)

Washington
• The Herbfarm (Woodinville)
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 2019:

Arizona
• Kai (in the Sheraton Wild Horse Pas Resort & Spa, Chandler)

California
• Addison (in The Grand Del Mar, San Diego)
• Dialogue (Los Angeles)
• Manresa (San Francisco)
• Saison (San Francisco)
• Studio (Laguna Beach)
• The French Laundry (Yountville)
• The Restaurant at Meadowood (in the Meadowood Napa Valley, St. Helena)

Colorado
• Element 47 (Aspen)
• The Penrose Room (in The Broadmoor, Colorado Springs)

District of Columbia
• Plume (Washington)

Florida
• Naoe (Miami)
• Victoria & Albert’s (in Disney’s Grand Floridian Resort & Spa, Lake Buena Vista)

Georgia
• The Georgian Room (in The Cloister, Sea Island)

Hawaii
• La Mer (Honolulu)
Illinois
• Alinea (Chicago)

Maine
• The White Barn Inn Restaurant (Kennebunk)

Massachusetts
• Menton (Boston)
• The Portico by Jeffrey Thompson (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
• Daniel (New York)
• Del Posto (New York)
• Eleven Madison Park (New York)
• Jean Georges Restaurant (in the Trump International Hotel & Towers, New York)
• Le Bernardin (New York)
• Masa (New York)
• Per Se (New York)

North Carolina
• Heron’s Restaurant (in The Umstead Hotel & Spa, Cary)

Pennsylvania
• Lautrec (in the Nemacolin Woodlands Resort, Farmington)
• TÈ (in The Inn at Leona Village, Leona)
• 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 2019

Announced in the May 2019 issue of Food & Wine, the following were recognized as the Best New Chefs of 2019:

- Bryan Furman (B’s Cracklin’ Barbeque; Atlanta and Savannah, GA)
- Caroline Glover (Annette; Aurora, CO)
- Brandon Go (Hayato; Los Angeles, CA)
- Matthew Kammerer (Harbor House Inn; Elk, CA)
- Paxx Caraballo Moll (Jungle BaoBao; San Juan, PR)
- Misti Norris (Petra and the Beast; Dallas, TX)
- Kwame Onwuachi (Kith/Kin; Washington, DC)
- Junghyun Park (Atomix; New York, NY)
- Mutsuko Soma (Kamonegi; Seattle, WA)
- Nite Yun (Nyum Bai; Oakland, CA)

106.3 Recent Award Winners

Food & Wine recognized the following as the Best New Chefs in recent years:

2018

- Diana Davila (Mi Tocaya Antojería; Chicago, IL)
- Michael Gallina (Vicia; St. Louis, MO)
- Katianna Hong (The Charter Oak, St. Helena; CA)
- Liz Johnson (Freedman’s; Los Angeles, CA)
- Jess Shadbolt and Clare de Boer (King; New York, NY)
- Julia Sullivan (Henrietta Red; Nashville, TN)
- Kevin Tien (Himitsu; Washington, DC)
- Brady Williams (Canlis; Seattle, WA)
- Kate Williams (Lady of the House; Detroit, MI)
- Jonathan Yao (Kato; Los Angeles, CA)
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)

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)
GREAT BEER BARS

107.1 Brewers Association

CraftBeer.com, an online community created by the Brewers Association (www.brewersassociation.com), annually asks readers to nominate their favorite craft beer bar in their state. Over 7,000 people participated in the 2019 survey.

The 2019 Great American Beer Bars are as follows:
- Alabama: Loosa Brews (Tuscaloosa)
- Alaska: Prospectors Historic Pizzeria & Alehouse (Denali Park)
- Arizona: Tap & Bottle (Tucson)
- Arkansas: Little Rock Flying Saucer (Little Rock)
- California: Crazy Harry’s Bar (Winnetka)
- Colorado: Freshcraft (Denver)
- Connecticut: Willimantic Brewing Company (Willimantic)
- District of Columbia: Churchkey (Washington)
- Delaware: Henlopen City Oyster House (Rehoboth)
- Florida: Oil Well Craft Beer (Ave Maria)
- Georgia: Brick Store Pub (Decatur)
- Hawaii: Square Barrels (Honolulu)
- Idaho: Bittercreek Alehouse (Boise)
- Illinois: the Brass Tap (Orland Park)
- Indiana: Deer Park Irish Pub (Fort Wayne)
- Iowa: the Keg Stand (West Des Moines)
- Kansas: the Anchor (Wichita)
- Kentucky: Holy Grale (Louisville)
- Louisiana: Avenue Pub (New Orleans)
- Maine: Craft Brew Underground (Auburn)
- Maryland: Max’s Taphouse (Baltimore)
- Massachusetts: Armsby Abbey (Worcester)
- Michigan: Brown Iron Brewhouse (Washington Township)
- Minnesota: Mankato Brewery (Mankato)
- Mississippi: the Porter (Hattiesburg)
- Missouri: Friendship Brewing (Wentzville)
- Montana: Lewis & Clark Tap Room (Helena)
- Nebraska: the Happy Raven (Lincoln)
- Nevada: Pinon Bottle Co. (Reno)
- New Hampshire: New England’s Tap House Grille (Hookset)
- New Jersey: Cloverleaf Tavern & Restaurant (Caldwell)
- New Mexico: Rowley Farmhouse Ales (Santa Fe)
- New York: the Owl Farm (Brooklyn)
- North Carolina: Craft Centric Taproom & Bottle Shop (Arden)
- North Dakota: Jl Beers (Fargo)
- Ohio: Brewfontaine (Bellefontaine)
- Oklahoma: Mcnellie’s (Tulsa)
- Oregon: Roscoe’s (Portland)
- Pennsylvania: Bulls Head Public House (Lititz)
- Puerto Rico: Taberna Boricua (San Juan)
- Rhode Island: Norey’s Newport (Newport)
- South Carolina: the Craft Stand (Lancaster)
- South Dakota: Independent Ale House (Rapid City)
- Tennessee: Hops and Hollers (Knoxville)
- Texas: Thistle Draftshop (Spring)
- Utah: Beerhive Pub (Salt Lake City)
- Vermont: Blackback Pub (Waterbury)
- Virginia: Harry’s Alehouse (Fredericksburg)
- Washington: Ben’s Bottle Shop (Vancouver)
- West Virginia: Bahnhof (Huntington)
- Wisconsin: the Brass Tap (Greenfield)
- Wyoming: Black Tooth Brewing Co. (Sheridan)

107.2 Draft Magazine

*Draft* designates America’s 100 Best Beer Bars annually. The following are the 2019 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)
- Beers 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)
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GREAT BURGERS

108.1 Overview
The following section lists several awards and designations that recognize outstanding burgers throughout the U.S.

108.2 List Of Recognitions
Big 7 Travel (www.bigseventravel.com)
- 8oz Burger and Co. (Seattle, WA)
- Al’s Burger Shack (Chapel Hill, NC)
- Alden & Harlow (Boston, MA)
- ArtsRiot (Burlington, VT)
- Avenue Eats (Wheeling, WV)
- Basic Burger (Arlington, VA)
- Beefys (Reno, NV)
- Bocado (Atlanta, GA)
- Bomber Burger (Wichita, KS)
- Boxcar (Santa Fe, NM)
- Bubba’s Texas Burger Shack (Houston, TX)
- Bulldog Restaurant (Bald Knob, AR)
- Burgers Never Say Die (Los Angeles, CA)
- Chubbfathers (Alabaster, AL)
- Clark Burger (Baltimore, MD)
- Cowfish (Lander, WY)
- Cutter’s Bar & Grill (Detroit, MI)
- Emily (Brooklyn, NY)
- Fine & Dandy (Jackson, MS)
- Gilleys Diner (Portsmouth, NH)
- GoldBurgers (Newington, CT)
- Harmon’s Lunch (Falmouth, ME)
- Harry’s Bar & Burger (Providence, RI)
- Holy Grale (Louisville, KY)
- HSL (Salt Lake City, UT)
- Hudsons Hamburgers (Coeur d’ Alene, ID)
- Kirby’s Sandwich Shop (Sikeston, MO)
• KQ Burger (Philadelphia, PA)
• Larkburger (Boulder, CO)
• Little Bad Wolf (Chicago, IL)
• Matt’s Bar (Minneapolis, MN)
• Moe’s Crosstown Tavern (Charleston, SC)
• North Avenue Grill (Wauwatosa, WI)
• Saucy Focaccia (Newbo, IA)
• Sickies Garage Burgers (Fargo, ND)
• Smoke the Burger Joint (Massillon, OH)
• Stella’s (Omaha, NE)
• Sugar Shack (Deadwood, SD)
• Teddy’s Bigger Burgers (Maui, HI)
• The Burger Dive (Billings, MT)
• The Company Burger (New Orleans, LA)
• The Lokal (Coral Gables, FL)
• The Pharmacy Burger Parlor (Nashville, TN)
• The Stand (Phoenix, AZ)
• The Superburger (Paoli, IN)
• Tommy’s Burger Stop (Anchorage, AK)
• Trifecta Tavern (Portland, OR)
• Tucker’s Onion Burgers (Oklahoma City, OK)
• Ulysses Gastropub (Wilmington, DE)
• White Manna (Hackensack, NJ)

Food & Wine (www.foodandwine.com)
• A-Frame (Los Angeles, CA)
• Brindle Room (New York, NY)
• Craigie on Main (Boston, MA)
• Dyer’s Burgers (Memphis, TN)
• Farm Burger (Decatur, GA)
• Father’s Office (Los Angeles, CA)
• Green Street Grill (Boston, MA)
• Healdsburg Bar & Grill (Healdsburg, CA)
• Hog & Hominy (Memphis, TN)
• Holeman & Finch (Atlanta, GA)
• In-N-Out Burger (California, various cities)
• Little Owl (New York, NY)
• Louis’ Lunch (New Haven, CT)
• Michael’s Genuine Food & Drink (Miami, FL)
• Miller’s Bar (Dearborn, MI)
• Minetta Tavern (New York, NY)
• Mission Bowling Club (San Francisco, CA)
• Napa: Gott’s Roadside (Napa, CA)
• Ohio: B-Spot Burgers (Cleveland, OH)
• Perini Ranch Steakhouse (Buffalo Gap, TX)
• Peter Luger (New York, NY)
• Shake Shack (New York, NY)
• Ted’s (Meriden, CT)
• The Company Burger (New Orleans, LA)
• The Spotted Pig (New York, NY)
• White Manna (Hackensack, NJ)
• Zuni Café (San Francisco, CA)

Food Network (www.foodnetwork.com)
• Au Cheval (Chicago, IL): Double Cheese Burger
• Brindle Room (New York, NY): Steakhouse Burger
• Mission Bowling Club (San Francisco, CA): Mission Burger
• Pie ’n Burger (Pasadena, CA): Classic Burger
• Sid’s Diner (El Reno, OK): The Onion Burger

Gayot (www.gayot.com)
• 25 Degrees (Hollywood, CA)
• 4505 Burgers & BBQ (San Francisco, CA)
• Becks Prime (Houston, TX)
• Cherry Cricket (Denver, CO)
• Farm Burger (Decatur, GA)
• Kuma’s Corner (Chicago, IL)
• MELT Gourmet Cheeseburgers (Leesburg, VA)
• Mr. Bartley’s Burger Cottage (Cambridge, MA)
• The Spotted Pig (New York, NY)

The Daily Meal (www.thedailymeal.com)
• Au Cheval (Chicago, IL): Cheeseburger
• db Bistro Moderne (New York, NY): The Original db Burger
• Father’s Office (Los Angeles, CA): The Office Burger
• Holeman & Finch Public House (Atlanta, GA): Double Cheeseburger
• Husk (Charleston, SC): Cheeseburger
• J.G. Melon (New York, NY): Cheeseburger
• Michael’s Genuine Food & Drink (Miami, FL): Black Angus Burger
• Minetta Tavern (New York, NY): Black Label Burger
• Santa Fe Bite (Santa Fe, NM): Green Chile Cheeseburger
• The Spotted Pig (New York, NY): Chargrilled Burger

Thrillist (www.thrillist.com)
• Brook’s Sandwich House (Charlotte, NC): Burger with cheese all the way
• Duke’s Grocery (Washington, DC): Proper Burger
• Garaje (San Francisco, CA): Drive-In Cheeseburger with grilled onions
• Knife Dallas (Dallas, TX): The Ozersky Burger
- Loretta's Northwesterner (Seattle, WA): The Tavern Burger
- Mott Street (Chicago, IL): The Mott Burger
- Raoul’s (New York, NY): The Burger
- Redcoat Tavern (Royal Oak, MI): Classic Burger with Sharp American
- Stanich’s (Portland, OR): Nick’s Cheeseburger with grilled onions
- White Hut (West Springfield, MA): Cheeseburger, fried onions

Trip Advisor (www.tripadvisor.com)
- Al's Burgershack (Chapel Hill, NC)
- Back Door Grill (Steamboat Springs, CO)
- Brooks Gourmet Burgers & Dogs (Naples, FL)
- Burger Republic (Nashville, TN)
- Grumps Burgers (Granbury, TX)
- Honest Abe's Burgers & Freedom (Lincoln, NE)
- MacPhail's Burgers (Jackson, WY)
- Pearl’s Deluxe Burgers (San Francisco, CA)
- Slabtown Cafe and Burgers (Traverse City, MI)
- The Burger Dive (Billings, MT)
109

GREAT PIZZERIAS

109.1 Overview
The following section lists several awards and designations that recognize pizza restaurants throughout the U.S.

109.2 List Of Recognitions

Food & Wine
- 800 Degrees (Los Angeles, CA)
- A16 Rockridge (Oakland, CA)
- Al Forno (Providence, RI)
- 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)
- Kesté Pizza and Vino (New York, NY)
- Lucale (Brooklyn, NY)
- Milo & Olive (Santa Monica, CA)
- Motorino (New York, NY)
- Paulie Gee's (Brooklyn, NY)
- Pig Ate My Pizza (Robbinsdale, MN)
- Pizzeria Bianco (Phoenix, AZ)
- Pizzeria Delfina (San Francisco, CA)
- Pizzeria Mozza (Los Angeles, CA)
- Pizzeria Vetri (Philadelphia, PA)
- Ribalta (New York, NY and Atlanta, GA)
- Rubirosa (New York, NY)
- Santarpio's Pizza (Boston, MA)
- Sottocasa (New York, NY)
- Tacconelli's Pizzeria (Philadelphia, PA)
- Totonno's (Brooklyn, NY)
- Via Tribunali (Seattle, WA)
Gayot (www.gayot.com)
- Bollo Woodfired Pizza (Houston, TX)
- Capo's Chicago Pizza & Fine Italian Dinners (San Francisco, CA)
- Cart-Driver (Denver, CO)
- Double Zero (Atlanta, GA)
- Frank Pepe's Pizzeria Napoletana (New Haven, CT)
- Full of Life Flatbread (Los Alamos, CA)
- Ken's Artisan Pizza (Portland, OR)
- Pizza Domenica (New Orleans, LA)
- Stella Barra Pizzeria (Santa Monica, CA)
- Tavola (New York, NY)

Thrillist (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)

Today Show
• Pizzeria Bianco (Phoenix, AZ)
• John's of Bleeker Street (New York, NY)
• Lou Malnati's Pizzeria (Chicago, IL)
• Pizzana (Los Angeles, CA)
• Lucali (Miami Beach, FL)
• Pupatella (Arlington, VA)
• Pizzeria Beddia (Philadelphia, PA)
• Bufalina (Austin, TX)
• Rubirosa (New York, NY)
• Parziale's Bakery (Boston, MA)

Trip Advisor (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)
• Moose 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)
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GREAT SEAFOOD RESTAURANTS

110.1 Overview
The following section lists several awards and designations that recognize seafood restaurants throughout the U.S.

110.2 List Of Recognitions
Foursquare City Guide (www.foursquare.com)
• 298 Bedford Avenue (Brooklyn, NY)
• Anchor Oyster Bar (San Francisco, CA)
• Bar Crudo (San Francisco, CA)
• Clark's Oyster Bar (Austin, TX)
• Eddie V's Prime Seafood (Austin, TX)
• Eventide Oyster Co. (Portland, ME)
• Flex Mussels (New York, NY)
• Greenpoint Fish & Lobster Co. (Brooklyn, NY)
• Half Shell Oyster House (Gulfport, MS)
• Hog Island Oyster Co. (San Francisco, CA)
• Island Creek Oyster Bar (Boston, MA)
• Joe's Seafood, Prime Steak & Stone Crab (Chicago, IL)
• Le Bernardin (New York, NY)
• Mama's Fish House (Paia, HI)
• Marea (New York, NY)
• Matunuck Oyster Bar (Wakefield, RI)
• Mermaid Oyster Bar (New York, NY)
• Oyster House (Philadelphia, PA)
• Pearl Oyster Bar (New York, NY)
• Pêche (New Orleans, LA)
• Sesuit Harbor Cafe (East Dennis, MA)
• Shaw's Crab House (Chicago, IL)
• Thames Street Oyster House (Baltimore, MD)
• The Optimist (Atlanta, GA)
• Upstate Craft Beer and Oyster Bar (New York, NY)
Gayot (www.gayot.com)
- GT Fish & Oyster (Chicago, IL)
- Le Bernardin (New York, NY)
- Maritana Grille (St. Pete Beach, FL)
- Matt’s in the Market (Seattle, WA)
- O Ya (Boston, MA)
- Pêche Seafood Grill (New Orleans, LA)
- Perla’s Seafood & Oyster Bar (Austin, TX)
- Providence (Los Angeles, CA)
- RingSide Fish House (Portland, OR)
- Stoic & Genuine (Denver, CO)
- The Sardine Factory (Monterey, CA)

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)

New York Post
- 167 Raw (Charleston, SC)
- Bob’s Clam Hut (Kittery, ME)
- Coni’Seafood (Inglewood, CA)
- Eventide Oyster Co. (Portland, ME)
- Fiola Mare (Washington, DC)
- Island Creek Oyster Bar (Boston, MA)
- Lassis Inn (Little Rock, AR)
- Le Bernardin (New York City, NY)
- Mama’s Fish House (Paia, HI)
- Matunuck Oyster Bar (South Kingstown, RI)
- Mignonette (Miami, FL)
- Neptune Oyster (Boston, MA)
- Pêche Seafood Grill (New Orleans, LA)
- Providence (Los Angeles, CA)
- Roe (Portland, OR)
- Russ & Daughters (New York City, NY)
- Select Oyster Bar (Boston, MA)
- Shaw’s Crab House (Chicago and Schaumburg, IL)
• Swan Oyster Depot (San Francisco, CA)
• The Angry Crab (Chicago, IL)
• The Walrus and The Carpenter (Seattle, WA)

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 (Wiscasset, 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)

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)

**Travel + Leisur**
• 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)

**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)
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GREAT STEAK HOUSES

111.1 Overview
The following section lists several awards and designations that recognize steakhouses throughout the U.S.

111.2 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 in Florida)
• 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 - Tribeca (New York, NY)
• Bazaar Meat by José Andrés (Las Vegas, NV)
• Bern’s Steak House (Tampa, FL)
• Butcher & Singer (Philadelphia, PA)
• Chianina Steakhouse (Long Beach, CA)
• Chophouse New Orleans (New Orleans, LA)
• Guard and Grace (Denver, CO)
• Knife (Dallas, TX)
• McKendricks Steak House (Atlanta, GA)
• 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)

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)
- 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)
- 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)
112.1 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.

112.2 Award Winners 2019
Outstanding Restaurant
• Zahav (Philadelphia, PA)

Best New Restaurant
• Frenchette (New York, NY)

Outstanding Chef
• Ashley Christensen (Poole’s Diner; Raleigh, NC)

Rising Star Chef
• Kwame Onwuachi (Kith and Kin; Washington, DC)

Outstanding Pastry Chef
• Kelly Fields (Willa Jean; New Orleans, LA)

Outstanding Baker
• Greg Wade (Publican Quality Bread; Chicago, IL)

Outstanding Bar Program
• Bar Agricole (San Francisco, CA)

Outstanding Restaurateur
• Kevin Boehm and Rob Katz (Boka Restaurant Group - Boka, Girl & the Goat, Momotaro, and others - (Chicago, IL)
Outstanding Service
• Frasca Food and Wine (Boulder, CO)

Outstanding Wine Program
• Benu (San Francisco, CA)

Outstanding Wine, Spirits, or Beer Professional
• Rob Tod (Allagash Brewing Company; Portland, ME)

Best Chef: Great Lakes (IL, IN, MI, OH)
• Beverly Kim and Johnny Clark (Parachute; Chicago, IL)

Best Chef: Mid-Atlantic (D.C., DE, MD, NJ, PA, VA)
• Tom Cunanan (Bad Saint; Washington, DC)

Best Chef: Midwest (IA, KS, MN, MO, NE, ND, SD, WI)
• Ann Kim (Young Joni; Minneapolis, MN)

Best Chef: New York City (Five Boroughs)
• Jody Williams and Rita Sodi (Via Carota)

Best Chefs: Northeast (CT, MA, ME, NH, NY State, RI, VT)
• Tony Messina (Uni; Boston, MA)

Best Chefs: Northwest (AK, ID, MT, OR, WA, WY)
• Brady Williams (Canlis; Seattle, WA)

Best Chef: South (AL, AR, FL, LA, MS)
• Vishwesh Bhatt (Snackbar; Oxford, MS)

Best Chef: Southeast (GA, KY, NC, SC, TN, WV)
• Mashama Bailey (The Grey; Savannah, GA)

Best Chef: Southwest (AZ, CO, NM, OK, TX, UT)
• Charleen Badman (FnB; Scottsdale, AZ)

Best Chef: West (CA, HI, NV)
• Michael Cimarusti (Providence; Los Angeles, CA)

112.3 Recent Award Winners
Outstanding Restaurant
• 2018: Highlands Bar & Grill Birmingham, AL
• 2017: Topolobampo (Chicago, IL)
• 2016: Alina (Chicago, IL)
• 2015: Blue Hill at Stone Barns (Pocantico Hills, NY)
• 2014: The Slanted Door (San Francisco, CA)

Best New Restaurant
• 2018: JuneBaby (Seattle, WA)
• 2017: Le Coucou (New York, NY)
• 2016: Shaya (New Orleans, LA)
• 2015: Bâtard (New York, NY)
• 2014: Pêche Seafood Grill (New Orleans, LA)

Outstanding Chef
• 2018: Gabrielle Hamilton (Prune; New York, NY)
• 2017: Michael Solomonov (Zahav; Philadelphia, PA)
• 2016: Suzanne Goin (Lacques; Los Angeles, CA)
• 2015: Michael Anthony (Gramercy Tavern; New York, NY)
• 2014: Nancy Silverton (Pizzeria Mozzo; Los Angeles, CA)

Rising Star Chef
• 2018: Camille Cogswell (Zahav; Philadelphia, PA)
• 2017: Zachary Engel (Shaya; New Orleans, LA)
• 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; Lummi Island, WA)

Outstanding Pastry Chef
• 2018: Dolester Miles (Highlands Bar & Grill; Birmingham, AL)
• 2017: Ghaya Oliveira (Daniel; New York, NY)
• 2016: Dahlia Narvaez (Osteria Mozza; Los Angeles, CA)
• 2015: Christina Tosi (Momofuku; New York, NY)
• 2014: Dominique Ansel (Dominique Ansel Bakery; New York, NY)

112.4 Market Resources
James Beard Foundation, 167 West 12th Street, New York, NY 10011. (212) 675-4984. (www.jamesbeard.org)
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MENU MASTERS AWARDS

113.1 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.

113.2 Winners By Category

Best Healthy Innovations
- 2019: Military Sealift Command’s new menu
- 2018: University of Connecticut Department of Dining Services
- 2017: Panera Bread
- 2016: Stanford University Residential & Dining Enterprises
- 2015: Which Wich - Vegan Chicken Banh Mi, Buffalo Chicken

Best Limited-Time Offer
- 2019: Culver’s - Pretzel Haus Pub Burger
- 2018: Sonic Drive-In - Signature Slingers
- 2017: P.F. Chang’s - Local Menu
- 2016: The Melting Pot - Dip Into Summer Menu
- 2015: Popeyes Louisiana Kitchen - Buttermilk Biscuit Butterfly Shrimp

Best Menu/Line Extension
- 2019: Bonefish Grill’s brunch menu
- 2018: Walk-On’s Bistreaux & Bar
- 2017: Aloha Plate at Brigham Young University - affordable Hawaiian cuisine
- 2016: Arby’s - sliders
- 2015: Smashburger - Organic Arugula, Truffle Mushroom & Swiss Burger

Best Menu Revamp
- 2019: Piada Italian Street Food
- 2018: Fogo de Chão
- 2017: Denny’s
- 2016: Sodexo
- 2015: Bonefish Grill
Best Menu Trendsetter
• 2019: Seamore’s
• 2018: The Kroger Co.
• 2017: By Chloe
• 2016: Slapfish
• 2015: Mendocino Farms
• 2014: True Food Kitchen
• 2013: Cooper’s Hawk Winery & Restaurants

Best New Menu Item
• 2019: Taco Bell - Nacho Fries
• 2018: Del Taco - Epic Queso Chicken Burrito
• 2017: Shake Shack - Chicken Shack Sandwich
• 2016: Jack in the Box - Classic Buttery Jack
• 2015: Chick-fil-A - Grilled Chicken Sandwich

Chef/Innovator
• 2019: Paul Kahan (Blackbird)
• 2018: Fabio Viviani (20 restaurants in 7 states)
• 2017: Stephanie Izard (Girl & The Goat)
• 2016: David Barzelay (Lazy Bear)
• 2015: Jimmy Bannos, Jr. (The Purple Pig)

Menu Masters Hall of Fame
• Burt Cutino (The Sardine Factory)
• Colonel Sanders (Kentucky Fried Chicken)
• Daniel Boulud (Daniel)
• David Overton (The Cheesecake Factory)
• Emeril Lagasse (Emeril’s)
• Jacques Pepin (French Culinary Institute)
• Jasper White (Jasper’s, Summer Shack)
• Jeremiah Tower (Chez Panisse)
• 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)

113.3 Market Resources
Nation’s Restaurant News, 249 W. 17th Street, New York, NY 10011. (212) 204-4200. (www.nrn.com)
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MICHELIN 3-STAR RESTAURANTS

114.1 Overview


114.2 Michelin 3-Star Restaurants 2019

- Alelier Green (San Francisco, CA)
- Alinea (Chicago, IL)
- Benu (San Francisco, CA)
- Chef's Table at Brooklyn Fare (Brooklyn, NY)
- Eleven Madison Park (New York, NY)
- Le Bernardin (New York, NY)
- Manresa (Los Gatos, CA)
- Masa (New York, NY)
- Per Se (New York, NY)
- Quince (San Francisco, CA)
- Saison (San Francisco, CA)
- Single Thread (Healdsburg, CA)
- The French Laundry (Yountville, CA)
- The Inn at Little Washington (Washington, VA)
- The Restaurant at Meadowood (St. Helena, CA)
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OPEN TABLE’S BEST RESTAURANTS

115.1 Overview
Open Table’s 100 Best Restaurants in America is based on analysis of more than 12 million reviews of more than 28,000 restaurants in 50 states and the District of Columbia.

The following is the Open Table list of 100 Best Restaurants In America for 2019:

115.2 Best Restaurants In America 2019
- Atlas (Atlanta, GA)
- Auberge du Soleil (Rutherford, CA)
- Avra Madison Estiatorio on 60th (New York, NY)
- Benu (San Francisco, CA)
- Bistro 31 (Dallas, TX)
- Blue Ridge Grill (Atlanta, GA)
- BOCA (Cincinnati, OH)
- Boka (Chicago, IL)
- Bondst (New York, NY)
- Bones (Atlanta, GA)
- Bouchard Restaurant and Inn (Newport, RI)
- Buccan (Palm Beach, FL)
- Bull & Bear Steakhouse (Orlando, FL)
- Cafe Provence (Prairie Village, KS)
- Cafe Monarch (Scottsdale, AZ)
- Casa Lever (New York, NY)
- Chez Billy Sud (Washington, DC)
- chi SPACCA (Los Angeles, CA)
- Costa Brava Bistro (Bellaire, TX)
- Del Posto (New York, NY)
- Double Knot (Philadelphia, PA)
- Ema (Chicago, IL)
- Frances (San Francisco, CA)
- Gabriel Kreuther (New York, NY)
- Geronimo (Santa Fe, NM)
- Gibsons Italia (Chicago, IL)
- Girl & the Goat (Chicago, IL)
- Gramercy Tavern (New York, NY)
- GW Fins (New Orleans, LA)
- Highlands Bar & Grill (Birmingham, AL)
- Il Mulino - Downtown (New York, NY)
- Il Segreto (Bel Air, CA)
- Joe's Seafood, Prime Steak & Stone Crab (Chicago, IL)
- JUNGSIK (New York, NY)
- Kappo Masa (New York, NY)
- Kinship (Washington, DC)
- Koi (Los Angeles, CA)
- Kokkari Estiatorio (San Francisco, CA)
- KYU (Miami, FL)
- L’ATELIER de Joël Robuchon (New York, NY)
- La Nouvelle Maison (Boca Raton, FL)
- Lafayette Restaurant (Washington, DC)
- LArtusi (New York, NY)
- Le Bilboquet (Dallas, TX)
- Le Diplomate (Washington, DC)
- Majorelle (New York, NY)
- Mama’s Fish House (Paia, HI)
- Maple & Ash (Chicago, IL)
- Marc Forgione (New York, NY)
- Marea (New York, NY)
- Market Restaurant and Bar (Del Mar, CA)
- Matsuhisa Denver (Denver, CO)
- Mesero - Inwood Village (Dallas, TX)
- Milos - 55th Street (New York, NY)
- Mistral (Sherman Oaks, CA)
- Neighborhood Services - Lovers (Dallas, TX)
- Noord (Philadelphia, PA)
- Omakase Room by Tatsu (New York, NY)
- Oriole (Chicago, IL)
- Parc (Philadelphia, PA)
- Phoenicia (Birmingham, MI)
- Quince (San Francisco, CA)
- Raoul’s (New York, NY)
- Rasika (Washington, DC)
- Rich Table (San Francisco, CA)
- RL Restaurant (Chicago, IL)
- Rosmarino Osteria Italiana (Newberg, OR)
- RPM Italian (Chicago, IL)
- Ruth’s Chris Steak House (Baton Rouge, LA)
- Saloon Restaurant (Philadelphia, PA)
• Salum Restaurant (Dallas, TX)
• Shinsei Restaurant (Dallas, TX)
• SHU - Sushi House Unico (Bel Air, CA)
• Sistina (New York, NY)
• Sotto (Cincinnati, OH)
• Steak 44 (Phoenix, AZ)
• Steve & Cookie’s By the Bay (Margate, NJ)
• Sushi Ginza Onodera (New York, NY)
• Sushi Kaito (New York, NY)
• Sushi Kappo Tamura (Seattle, WA)
• Sushi Nakazawa (New York, NY)
• Talula’s Garden (Philadelphia, PA)
• Terzo (San Francisco, CA)
• The Arthur J (Manhattan Beach, CA)
• The Bar Room at The Modern (New York, NY)
• The Capital Grille (Boston, MA)
• The Dining Room at Castle Hill Inn (Newport, RI)
• The Inn at Little Washington (Washington, VA)
• The Lawn at Castle Hill Inn (Newport, RI)
• The Metro Wine Bar & Bistro (Oklahoma City, OK)
• The Modern (New York, NY)
• The Polo Bar (New York, NY)
• The Table at Season To Taste (Cambridge, MA)
• Tosca Ristorante (Washington, DC)
• Toscana (Los Angeles, CA)
• Tutta Pesca (Hoboken, NJ)
• Uchi Dallas (Dallas, TX)
• UMI (Atlanta, GA)
• Vetri Cucina (Philadelphia, PA)
• Zahav (Philadelphia, PA)

115.3 Market Resources
OpenTable, 1 Montgomery Street, Suite 700, San Francisco, CA 94104. (www.opentable.com)
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RESTAURANT NEIGHBOR AWARD

116.1 Overview
According to the National Restaurant Association (www.restaurant.org), 90% of restaurants give back to the local communities which they serve through charitable activities, each donating time or money to an average of 35 projects annually.

The National Restaurant Association Educational Foundation (NRAEF; www.chooserestaurants.org) honors select restaurant companies with the Restaurant Neighbor Award. Winners are selected based on overall philanthropic impact and the duration of their involvement, innovation, and level of support.

116.2 Award Winners 2019
Three national Restaurant Neighborhood Awards were given in 2019, as follows:
- Large Business Winner: Tropical Smoothie Cafe (locations nationwide)
- Mid-Size Business Winner: Southern Hospitality Ventures, Inc. dba Raising Cane’s Chicken Fingers (Lincoln, NE)
- Small Business Winner: Great Full Gardens (Reno, NV)

116.3 Recent Award Winners
NRAEF recognized the following restaurant companies with Restaurant Neighbor Awards in recent years:
2018
- Anna Maria Oyster Bar (Bradenton, FL)
- Burger King McLamore Foundation (Miami, FL)
- Wildflower Bread Company (Arizona)

2017
- Gecko’s Grill & Pub (Sarasota, FL)
- International Dairy Queen (Minneapolis, MN)
- The Red Barn Restaurant (Augusta, ME)

2016
- Carr’s Steakhouse (Mayfield, KY)
- Firehouse Subs (Jacksonville, FL)
- Gregg’s Restaurants & Pubs (East Greenwich, RI)
2015
• Ollie’s Restaurant (Edwardsville, PA)
• T.L. Cannon Companies (Williamsville, NY)
• The King’s Kitchen/Noble Food & Pursuits (Charlotte, NC)

2014
• Cohn Restaurant Group (San Diego, CA)
• Panda Restaurant Group (Rosemead, CA)
• Passport Pizza (Clinton Township, MI)
TRAVELERS’ CHOICE AWARDS

117.1 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 three Restaurant categories.

117.2 Awards 2019
Fine Dining
1. Gabriel Kreuther (New York, NY)
2. Daniel (New York, NY)
3. Cafe Monarch (Scottsdale, AZ)
4. Circa 1886 Restaurant (Charleston, SC)
5. Flight Restaurant & Wine Bar (Memphis, TN)
6. Halls Chophouse (Charleston, SC)
7. GW Fins (San Francisco, CA)
8. Charleston Grill (Charleston, SC)
9. Lahaina Grill (Lahaina, HI)
10. Geronimo (Santa Fe, NM)
11. Le Cirque (Las Vegas, NV)
12. Zahav (Philadelphia, PA)
13. The Bazaar by Jose Andrés (Los Angeles, CA)
14. Merriman’s (Waimea, HI)
15. Peninsula Grill (Charleston, SC)
16. Restaurant August (New Orleans, LA)
17. Grill 225 (Charleston, SC)
18. The Modern (New York, NY)
19. Alina (Chicago, IL)
20. Craft (New York, NY)
21. Fiola (Washington, DC)
22. Kokkari Estiatorio (San Francisco, CA)
23. Mama’s Fish House (Paia, HI)
24. Le Bernardin (New York, NY)
25. Bavette’s Bar and Boeuf (Chicago, IL)

**Everyday Dining**

1. Pane & Vino (Miami Beach, FL)
2. Mon Ami Gabi (Las Vegas, NV)
3. Hog Island Oyster Company (San Francisco, CA)
4. Phil’s BBQ (San Diego, CA)
5. Spice Symphony (New York, NY)
6. Duke’s Waikiki (Honolulu, HI)
7. Blue Heaven (Key West, FL)
8. Santa Barbara Shellfish Company (Santa Barbara, CA)
9. Oceana Grill (New Orleans, LA)
10. The Pink Door (Seattle, WA)
11. Piccola Cucina Osteria (New York, NY)
12. Splasher’s Grill (Kailua-Kona, HI)
13. Pineapple’s Island Fresh Cuisine (Hilo, HI)
14. B.B. King’s Blues Club (Memphis, TN)
15. The Purple Pig (Chicago, IL)
16. Caffe Milano (Naples, FL)
17. Deschutes Brewery (Portland, OR)
18. Crystal Beer Parlor (Savannah, GA)
19. Grillfish (Washington, DC)
20. 49th State Brewing Company (Anchorage, AK)
21. Central BBQ (Memphis, TN)
22. Pecan Lodge (Dallas, TX)
23. Mary Mac’s Tea Room (Atlanta, GA)
24. Ristorante Pesto (Philadelphia, PA)
25. Jack Stack Barbecue (Kansas City, MO)

**Fast Casual**

1. Portillo’s Hot Dogs (Chicago, IL)
2. Earl of Sandwich (Las Vegas, NV)
3. Shake Shack (New York, NY)
4. Blaze Pizza (Orlando, FL)
5. In-N-Out Burger (Los Angeles, CA)
6. The Taco Stand (La Jolla, CA)
7. Five Guys (Orlando, FL)
8. Super Duper Burgers (San Francisco, CA)
9. Tacos el Gordo (Las Vegas, NV)
10. Torchy’s Tacos (Austin, TX)
11. &pizza (Washington, DC)
12. Teddy’s Bigger Burgers (Honolulu, HI)
13. Island Taco (Waimea, HI)
14. Joe’s Pizza (New York, NY)
15. MOD Pizza (Seattle, WA)
17. Firehouse Subs (Pigeon Forge, TN)
18. Five on Black (Missoula, MT)
19. El Guero Canelo (Tucson, AZ)
20. BurgerFi (South Padre Island, TX)
21. David’s Burgers (Little Rock, AR)
22. Hip City Veg (Philadelphia, PA)
23. The Kati Roll Company (New York, NY)
24. Cook Out (Myrtle Beach, SC)
25. Sweetgreen (Washington, DC)

117.3 Market Resources
TripAdvisor, 400 1st Avenue, Needham, MA 02494. (781) 800-5000. (www.tripadvisor.com)
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TOP COCKTAILS: RESTAURANT HOSPITALITY

118.1 Overview

Restaurant Hospitality annually recognizes the Best Cocktails in America. This chapter presents the 2018, 2017, and 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

118.2 Best Cocktails in America: 2018

• Blueberry Yum Yum (Sea Sea Riders; Dundin, FL)
• Cinema Manhattan (Baba Bar; Arlington, VA)
• Earth Rise (The Annex, Flagstaff, AZ)
• Meloncholy Baby (Bank Cafe & Bar; Napa, CA)
• Mood Ring (Antique Bar & Bakery; Hoboken, NJ)
• Rainbow Sangria ( I/O Godfrey; Chicago, IL)
• The Sultans Tea (Shiraz; Las Vegas, NV)
• The Salted Plum (Harlowe MXM; Dallas, TX)
• Voodoo Priestess (Grant Grill and Lounge; San Diego, CA)
• You're a Prima Ballerina on a Spring Afternoon (Sidecar; San Luis Obispo, CA)

118.3 Previous Winners

2017
• Bathtub Gin (The Alex Craft Cocktail Cellar & Speakeasy; Washington, DC)
• G & Tea (The Reserve at The Langham; Boston, MA)
• La Flama Blanca (The Black Sheep; Las Vegas, NV)
• Leonardo’s Smoke (Emmerson; Boulder, CO)
• Modernist Herbal Negroni (Grant Grill; San Diego, CA)
• Non é Acqua (L’Amico; New York, NY)
• Not a Cosmo (Stockyard Burgers & Bones; Marietta, GA)
• Praying Osmanthus (Dirty Habit; Washington, DC)
• The Girl From Ipanema (The Whistler; Chicago, IL)
• Transformation Cubed (Firefly, Washington, DC)

2016
• Coco Lada (The Lone Wolf Bar; Kansas City, MO)
• Compass Points (Mutiny Pirate Bar & Island Grille; Glen Burnie, MD)
• Don Fabrizio (Il Gattopardo; New York, NY)
• Dr. No (Salt House; San Francisco, CA)
• Drunken Panda (Culinary Dropout; Phoenix, AZ)
• Ginger Rye Grilled Peach Old Fashioned (Fish City Grill; Dallas, TX)
• Notes from Granny (Magnolia House; Pasadena, CA)
• Nudge of the River (Currents at the Riverhouse on the Deschutes; Bend, OR)
• Pistols at Dawn (Culinary Dropout; Phoenix, AZ)
• Spiced Pear and Raspberry Mojito (Old Fountain Tavern; Dacula, GA)
• Sweet Flower of Mine (Formento’s; Chicago, IL)
• The California Mule (Olamendi’s Mexican Restaurant; Dana Point, CA)
• Titanic (Trummer’s on Main; Clifton, VA)
• Uva (Nora’s Italian Cuisine; Las Vegas, NV)
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TOP RESTAURANTS: GAYOT

119.1 Overview
Since 1969, Gayot (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 2018 selections.

119.2 Selections 2018
• Addison (San Diego, CA)
• Alinea (Chicago, IL)
• Atelier Crenn (San Francisco, CA)
• Atera (New York, NY)
• Aubergine (Carmel, CA)
• Blue Hill at Stone Barns (Tarrytown, NY)
• Chef Mavro (Honolulu, HI)
• Daniel (New York, NY)
• Eleven Madison Park (New York, NY)
• Everest (Chicago, IL)
• Frasca Food and Wine (Boulder, CO)
• Gabriel Kreuther (New York, NY)
• George Trois (Winnetka, IL)
• Jean-Georges (New York, NY)
• Joël Robuchon Restaurant (Las Vegas, NV)
• L’Espalier (Boston, MA)
• Le Bernardin (New York, NY)
• La Folie (San Francisco, CA)
• La Toque (Napa, CA)
• Manresa (Los Gatos, CA)
• Mélisse (Santa Monica, CA)
• Menton (Boston, MA)
• 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 Eugene (Atlanta, GA)
• Restaurant Guy Savoy (Las Vegas, NV)
• Restaurant Nicholas (Red Bank, NJ)
• Saison (San Francisco, CA)
• SingleThread Farm-Restaurant-Inn (Healdsburg, CA)
• The French Laundry (Yountville, CA)
• The Inn at Little Washington (Washington, VA)
• The Restaurant at Meadowood (St. Helena, CA)
• The Willows Inn (Lummi Island, WA)
• Twist by Pierre Gagnaire (Las Vegas, NV)
• Vetri (Philadelphia, PA)
• Vie (Western Springs, IL)

119.3 Market Resources
Gayot, 4311 Wilshire Boulevard, Suite 405, Los Angeles, CA 90010. (323) 965-3529. (www.guyot.com)
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TOP RESTAURANTS: THE DAILY MEAL

120.1 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.

120.2 Top Selections 2019

1. Eleven Madison Park (New York, NY)
2. Alinea (Chicago, IL)
3. Le Bernardin (New York, NY)
4. Joël Robuchon (Las Vegas, NV)
5. Atelier Crenn (San Francisco, CA)
6. The Restaurant at Meadowood (St. Helena, CA)
7. Inn at Little Washington (Washington, VA)
8. The French Laundry (Yountville, CA)
9. The Barn at Blackberry Farm (Walland, TN)
10. Blue Hill at Stone Barns (Pocantico Hills, NY)
11. Manresa (Los Gatos, CA)
12. Dialogue (Santa Monica, CA)
13. Quince (San Francisco, CA)
14. Daniel (New York, NY)
15. Guy Savoy (Las Vegas, NV)
16. Per Se (New York, NY)
17. Next (Chicago, IL)
18. Benu (San Francisco, CA)
19. Mélisse, (Santa Monica, CA)
20. Saison (San Francisco, CA)
22. Girl & the Goat (Chicago, IL)
23. Chez Panisse (Berkeley, CA)
24. Gramercy Tavern (New York, NY)
25. é by José Andrés (Las Vegas, NV)
26. Coi (San Francisco, CA)
27. Jean Georges (New York, NY)
28. Topolobampo (Chicago, IL)
29. Providence (Los Angeles, CA)
30. Gary Danko (San Francisco, CA)
31. Momofuku Ko (New York, NY)
32. Minibar (Washington, DC)
33. Angler (San Francisco, CA)
34. Peter Luger (Brooklyn, NY)
35. Husk (Charleston, SC)
36. Highlands Bar & Grill (Birmingham, AL)
37. August (New Orleans, LA)
38. Lucques (Los Angeles, CA)
39. Blackbird (Chicago, IL)
40. Spago (Beverly Hills, CA)
41. Fearing’s (Dallas, TX)
42. Roister (Chicago, IL)
43. Cotogna (San Francisco, CA)
44. Bazaar (Los Angeles, CA)
45. City Grocery (Oxford, MS)
46. Gjelina (Venice, CA)
47. The Catbird Seat (Nashville, TN)
48. Lantern (Chapel Hill, NC)
49. Fig (Charleston, SC)
50. Vetri Cucina (Philadelphia, PA)
51. Spiaggia (Chicago, IL)
52. Charleston (Baltimore, MD)
53. Trois Mec (Los Angeles, CA)
54. Gabriel Kreuther (New York, NY)
55. NoMad (New York, NY)
56. Hugo’s (Houston, TX)
57. Cosme (New York, NY)
58. Fat Rice (Chicago, IL)
59. Avec (Chicago, IL)
60. Gotham Bar & Grill (New York, NY)
61. Le Coucou (New York, NY)
62. Pêche (New Orleans, LA)
63. Le Pigeon (Portland, OR)
64. Zuni Cafe (San Francisco, CA)
65. Delfina (San Francisco, CA)
66. Galatoire’s (New Orleans, LA)
67. Marea (New York, NY)
68. O Ya (Boston, MA)
69. Nopa (San Francisco, CA)
70. Masa (New York, NY)
71. Animal (Los Angeles, CA)
72. Coquine (Portland, OR)
73. Rustic Canyon (Santa Monica, CA)
74. Norman’s (Orlando, FL)
75. JuneBaby (Seattle, WA)
76. Mission Chinese (San Francisco, CA)
77. Boka (Chicago, IL)
78. Beast (Portland, OR)
79. Bazaar Meat (Las Vegas, NV)
80. Canlis (Seattle, WA)
81. Alan Wong’s (Honolulu, HI)
82. Frasca Food & Wine (Boulder, CO)
83. Cúrate (Asheville, NC)
84. Del Posto (New York, NY)
85. Roast (Detroit, MI)
86. Everest (Chicago, IL)
87. Commander’s Palace (New Orleans, LA)
88. Monteverde (Chicago, IL)
89. Pok Pok (Portland, OR)
90. Bestia (Los Angeles, CA)
91. Rose’s Luxury (Washington, DC)
92. State Bird Provisions (San Francisco, CA)
93. Holeman & Finch (Atlanta, GA)
94. Ristorante Bartolotta (Milwaukee, WI)
95. Hominy Grill (Charleston, SC)
96. Empire State South (Atlanta, GA)
97. The Greenhouse Tavern (Cleveland, OH)
98. Osteria Mozza (Los Angeles, CA)
99. Cochon (New Orleans, LA)
100. Scampo (Boston, MA)
101. Fore Street (Portland, ME)

120.3 Market Resources
The Daily Meal, 156 5th Avenue, Suite 400, New York, NY 10010.
(www.thedailymeal.com)
121

WINE SPECTATOR GRAND AWARD

121.1 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 2019, there were more than 3,600 recipients of these awards.

121.2 Award Recipients 2019

U.S. Grand Award recipients for 2019 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 Wine Sellar & 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

122.1 Best Restaurants
Among various lists of award-winning fine-dining restaurants, World’s Best Restaurants, originally published by British magazine Restaurant and currently published by William Reed Business Media, is the most recognized. The ranking is based on a poll of international chefs, restaurateurs, gourmands, and restaurant critics.

122.2 Award Winners For 2019
The World’s Best Restaurants list for 2019 is as follows:
1. Mirazur (Menton, France)
2. Noma (Copenhagen, Denmark)
3. Asador Etxebarri (Axpe, Spain)
4. Gaggan (Bangkok, Thailand)
5. Geranium (Copenhagen, Denmark)
6. Central (Lima, Peru)
7. Mugaritz (San Sebastián, Spain)
8. Arpège (Paris, France)
9. Disfrutar (Barcelona, Spain)
10. Maido (Lima, Peru)
11. Den (Tokyo, Japan)
12. Pujol (Mexico City, Mexico)
13. White Rabbit (Moscow, Russia)
14. Azurmendi (Larrabetzu, Spain)
15. Septime (Paris, France)
16. Alain Ducasse Au Plaza Athénée (Paris, France)
17. Steirereck (Vienna, Austria)
18. Odette (Singapore)
19. Twins Garden (Moscow, Russia)
20. Tickets (Barcelona, Spain)
21. Frantzén (Stockholm, Sweden)
22. Narisawa (Tokyo, Japan)
23. Cosme (New York, NY, United States)
24. Quintonil (Mexico City, Mexico)
25. Alléno Paris Au Pavillon Ledoyen (Paris, France)
26. Boragó (Santiago, Chile)
27. The Clove Club (London, United Kingdom)
28. Blue Hill at Stone Barns (Pocantico Hills, NY, United States)
29. Piazza Duomo (Alba, Italy)
30. Elkano (Getaria, Spain)
31. Le Calandre (Rubano, Italy)
32. Nyle's (London, United Kingdom)
33. Don Julio (Buenos Aires, Argentina)
34. Atelier Crenn (San Francisco, CA, United States)
35. Le Bernardin (New York, NY, United States)
36. Alinea (Chicago, IL, United States)
37. Hiša Franko (Kobarid, Slovenia)
38. A Casa Do Porco (São Paulo, Brazil)
39. Restaurant Tim Raue (Berlin, Germany)
40. The Chairman (Hong Kong, China)
41. Belcanto (Lisbon, Portugal)
42. Hof Van Cleve (Kruisem, Belgium)
43. The Test Kitchen (Cape Town, South Africa)
44. Sühring (Bangkok, Thailand)
45. De Librije (Zwolle, the Netherlands)
46. Benu (San Francisco, CA, United States)
47. Ultraviolet by Paul Pairet (Shanghai, China)
48. Leo (Bogotá, Colombia)
49. Schloss Schauenstein (Fürstenau, Switzerland)
50. Reale (Castel Di Sangro, Italy)
51. Mikla (Istanbul, Turkey)
52. Arzak (San Sebastian, Spain)
53. D.O.M. (São Paulo, Brazil)
54. Maeemo (Oslo, Norway)
55. Relae (Copenhagen, Denmark)
56. Nobelhart & Schmutzig (Berlin, Germany)
57. Sud 777 (Mexico City, Mexico)
58. Burnt Ends (Singapore)
59. Indian Accent (New Delhi, India)
60. Uliassi (Senigallia, Italy)
61. Nihonryori Ryugin (Tokyo, Japan)
62. Florilège (Tokyo, Japan)
63. The Ledbury (London, United Kingdom)
64. Selfie (Moscow, Russia)
65. Core by Clare Smyth (London, United Kingdom)
66. Astrid Y Gastón (Lima, Peru)
67. Fäviken (Järpen, Sweden)
68. Nahm (Bangkok, Thailand)
70. Saison (San Francisco, CA, United States)
71. Singlethread (Healdsburg, CA, United States)
72. Aqua (Wolfsburg, Germany)
73. Maní (São Paulo, Brazil)
74. Lasai (Rio De Janeiro, Brazil)
75. Diverxo (Madrid, Spain)
76. Momofuku Ko (New York, NY, United States)
77. Chef's Table at Brooklyn Fare (New York, NY, United States)
78. Lido 84 (Gardone Riviera, Italy)
79. Mingles (Seoul, Korea)
80. Estela (New York, NY, United States)
81. Quique Dacosta (Denia, Spain)
82. Enigma (Barcelona, Spain)
83. Dinner by Heston Blumenthal (London, United Kingdom)
84. Attica (Melbourne, Australia)
85. Amass (Copenhagen, Denmark)
86. Tegui (Buenos Aires, Argentina)
87. Martin Berasategui (Lasarte-oria, Spain)
88. Lung King Heen (Hong Kong, China)
89. 108 (Copenhagen, Denmark)
90. Alo (Toronto, Canada)
91. Sushi Saito (Tokyo, Japan)
92. Harvest (St. Petersburg, Russia)
93. La Cime (Osaka, Japan)
94. Aponiente (El Puerto De Santa María, Spain)
95. Gaa (Bangkok, Thailand)
96. Belon (Hong Kong, China)
97. Vendôme (Bergisch Gladbach, Germany)
98. Anne-Sophie Pic (Valence, France)
99. The Jane (Antwerp, Belgium)
100. Oteque (Rio De Janeiro, Brazil)
101. Brae (Birregurra, Australia)
102. Amber (Hong Kong, China)
103. Jade Dragon (Macao, China)
104. Cococo (St. Petersburg, Russia)
105. Kadeau (Copenhagen, Denmark)
106. Restaurant David Toutain (Paris, France)
107. Il Ristorante Luca Fantin (Tokyo, Japan)
108. L'astrance (Paris, France)
109. Alcalde (Guadalajara, Mexico)
110. Neolokal (Istanbul, Turkey)
111. Chambre Séparée (Ghent, Belgium)
112. St John (London, United Kingdom)
113. Vea (Hong Kong, China)
114. La Colombe (Cape Town, South Africa)
115. Per Se (New York, NY, United States)
116. St. Hubertus (San Cassiano, Italy)
117. Epicure (Paris, France)
118. Ernst (Berlin, Germany)
119. Atomix (New York, NY, United States)
120. Sugalabo (Tokyo, Japan)
WORLD’S BEST BARS

123.1 Best Bars

William Reed Business Media (www.williamreed.com) annually publishes World’s Best Bars, a companion list to World’s Best Restaurants.

123.2 Award Winners For 2019

William Reed’s World’s 50 Best Bars list for 2019 is as follows:

1. Dandelyan (London, England, United Kingdom)
3. Manhattan (Singapore)
4. NoMad (New York, NY, United States)
5. Connaught Bar (London, England, United Kingdom)
7. The Clumsies (Athens, Greece)
8. Atlas (Singapore)
9. Dante (New York, NY, United States)
10. The Old Man (Hong Kong)
11. Licoreria Limantour (Mexico City, Mexico)
12. High Five (Tokyo, Japan)
13. Native (Singapore)
14. Floreria Atlantico (Buenos Aires, Argentina)
15. Attaboy (New York, NY, United States)
16. The Dead Rabbit (New York, NY, United States)
17. Oriole (London, England, United Kingdom)
19. Himkok (Oslo, Norway)
20. Speak Low (Shanghai, China)
21. Sweet Liberty (Miami, FL, United States)
22. Baba Au Rum (Athens, Greece)
23. Operation Dagger (Singapore)
24. Le Syndicat (Paris, France)
25. Lost & Found (Nicosia, Cyprus)
26. Employees Only (New York, NY, United States)
27. Central Station (Beirut, Lebanon)
29. Three Sheets (London, England, United Kingdom)
30. Black Pearl (Melbourne, Australia)
31. Tales & Spirits (Amsterdam, Netherlands)
32. Linje Tio (Stockholm, Sweden)
33. Little Red Door (Paris, France)
34. 28 Hongkong Street (Singapore)
35. Happiness Forgets (London, England, United Kingdom)
36. La Factoria (San Juan, Puerto Rico)
37. Paradiso (Barcelona, Spain)
38. Indulge Experimental Bistro (Taipei, Taiwan)
39. El Copitas (Saint Petersburg, Russia)
40. Tommy’s (San Francisco, CA, United States)
41. Blacktail (New York, NY, United States)
42. Candelaria (Paris, France)
43. Schumann’s (Munich, Germany)
44. Trick Dog (San Francisco, CA, United States)
45. Fifty Mils (Mexico City, Mexico)
46. Swift (London, England, United Kingdom)
47. Salmon Guru (Madrid, Spain)
48. Buck & Breck (Berlin, Germany)
49. Bar Benfiddich (Tokyo, Japan)
50. Lost Lake (Chicago, Illinois, United States)
APPENDIX A

ACADEMIC PROGRAMS

Art Institutes, International Culinary Schools
(www.artinstitutes.edu/culinary-arts-3102.aspx) and
(www.artinstitutes.edu/culinary-management-3202.aspx)
• The Art Institute of Atlanta, 100 Embassy Row, 6600 Peachtree Dunwoody Road, Atlanta, GA 30328
• The Art Institute of Austin, 100 Farmers Circle, Austin, TX 78728
• The Art Institute of California Hollywood, 5250 Lankershim Boulevard, North Hollywood, CA 91601
• The Art Institute of California Inland Empire, 674 East Brier Drive, San Bernardino, CA 92408
• The Art Institute of California Los Angeles, 2900 31st Street, Santa Monica, CA 90405
• The Art Institute of California Orange County, 3601 West Sunflower Avenue, Santa Ana, CA 92704
• The Art Institute of California Sacramento, 2850 Gateway Oaks Drive, Suite #100, Sacramento, CA 95833
• The Art Institute of California San Diego, 7650 Mission Valley Road, San Diego, CA 92108
• The Art Institute of California San Francisco, 1170 Market Street, San Francisco, CA 94102
• The Art Institute of California Silicone Valley, 1120 Kifer Road, Sunnyvale, CA 94086
• The Art Institute of Charleston, 24 North Market Street, Charleston, SC 29401
• The Art Institute of Charlotte, 2110 Water Ridge Parkway, Charlotte, NC 28217
• The Art Institute of Colorado, 1200 Lincoln Street, Denver, CO 80203
• The Art Institute of Dallas, 8080 Park Lane, Suite 100, Dallas, TX 75231
• The Art Institute of Fort Lauderdale, 1799 S.E. 17th Street, Ft. Lauderdale, FL 33316
• The Art Institute of Houston, 1900 Yorktown Street, Houston, TX 77056
• The Art Institute of Indianapolis, 3500 Depauw Boulevard, Suite 1010, Indianapolis, IN 46268
• The Art Institute of Jacksonville, 8775 Baypine Road, Jacksonville, FL 32256
• The Art Institute of Las Vegas, 2350 Corporate Circle, Las Vegas, NV 89074
• The Art Institute of Michigan, 28125 Cabot Drive, Suite 120, Detroit, MI 48377
• The Art Institute of Ohio - Cincinnati, 8845 Governors Hill Drive, Cincinnati, OH 45249
• The Art Institute of Philadelphia, 1622 Chestnut Street, Philadelphia, PA 19103
• The Art Institute of Phoenix, 2233 West Dunlap Avenue, Phoenix, AZ 85021
• The Art Institute of Pittsburgh, 420 Boulevard of the Allies, Pittsburgh, PA 15219
• The Art Institute of Portland, 1122 N.W. Davis Street, Portland, OR 97209
• The Art Institute of Raleigh-Durham, 410 Blackwell Street, Suite 200, Durham, NC 27701
• The Art Institute of Salt Lake City, 121 West Election Road, Suite 100, Salt Lake City, UT 84020
• The Art Institute of San Antonio, 10000 IH-10 West, Suite 200, San Antonio, TX 78230
• The Art Institute of Seattle, 2323 Elliott Avenue, Seattle, WA 98121
• The Art Institute of St. Louis, 1520 South Fifth Street, Suite 107, St. Charles, MO 63303
• The Art Institute of Tampa, 4401 North Himes Avenue, Suite 150, Tampa, FL 33614
• The Art Institute of Tennessee - Nashville, 100 Centerview Drive, Suite 250, Nashville, TN 37214
• The Art Institute of Tucson, 5099 E. Grant Road, Suite 100, Tucson, AZ 85712
• The Art Institute of Virginia Beach, 4500 Main Street, Suite 100, Virginia Beach, VA 23462
• The Art Institute of Washington, 1820 North Fort Myer Drive, Arlington, VA 22209
• The Art Institute of Wisconsin, 320 East Buffalo Street, Suite 600, Milwaukee, WI 53202
• The Art Institutes International Kansas City, 8208 Melrose Drive, Kansas City, KS 66214
• The Art Institutes International Minnesota, 15 South 9th Street, Minneapolis, MN 55402
• The Illinois Institute of Art - Chicago, 350 N. Orleans Street, Chicago, IL 60654

Atlantic Cape Community College (www.atlantic.edu/aca/index.htm)
• Academy of Culinary Arts (Atlantic City), 1535 Bacharach Boulevard, Atlantic City, NJ 08401
• Academy of Culinary Arts (Cape May County), 341 Court House-South Dennis Road, Cape May Court House, NJ 08210
• Academy of Culinary Arts (Mays Landing), 5100 Black Horse Pike, Mays Landing, NJ 08330

Baker College (www.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)
• Main Campus: 1946 Campus Drive, Hyde Park, NY 12538
• Greystone: 2555 Main Street, St. Helena, CA 94574
• San Antonio: 312 Pearl Parkway, Building 2, Suite 2102, San Antonio, TX 78215

Culinary Institute of Virginia (www.chefva.com)
• 2428 Almeda Avenue, Suite 106, Norfolk, VA 23513

Florida International University (www.hospitality.fiu.edu)
• Chaplin School of Hospitality & Tourism Management, Biscayne Bay Campus, 3000 N.E. 151st Street, North Miami, FL 33181

International Culinary Center (www.internationalculinarycenter.com)
• Main Campus: 462 Broadway, New York, NY 10013
• West Coast: 700 West Hamilton Avenue, Campbell, CA 95008

Johnson and Wales University (www.jwu.edu)
• Main Campus: 8 Abbott Park Place, Providence, RI 02903
• 801 West Trade Street, Charlotte, NC 28202
• 1701 NE 127th Street, North Miami, FL 33181
• 7150 Montview Boulevard, Denver, CO 80220

Keiser University, Center for Culinary Arts (www.keiseruniversity.edu/culinary-arts-as)
• 1700 Halstead Boulevard, Building 2, Tallahassee, FL 32309
• 900 S. Babcock Street, Melbourne, FL 32901
• 6151 Lake Osprey Drive, Sarasota, FL 34240

Kendall College (www.kendall.edu)
• School of Culinary Arts, 900 North Branch Street, Chicago, IL 60642

L’École Culinaire (www.lecoleculinaire.com)
• 9811 South Forty Drive, St. Louis, MO, 63124
• 1245 N. Germantown Parkway, Cordova, TN 38016
• 310 Ward Parkway, Kansas City, MO 64112

Le Cordon Bleu College of Culinary Arts (www.chefs.edu)
• Atlanta: 1927 Lakeside Parkway, Tucker, GA 30084
• Austin: 3110 Esperanza Crossing, Suite 100, Austin, TX 78758
• Boston: 215 First Street, Cambridge, MA 02142
• Chicago: 361 West Chestnut, Chicago, IL 60610
• Dallas: 11830 Webb Chapel Road, Suite 1200, Dallas, TX 75234
• Las Vegas: 1451 Center Crossing Road, Las Vegas, NV 89144
• Los Angeles: 530 East Colorado Boulevard, Pasadena, CA 91101
• 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

Mitchell Technical Institute
(www.mitchelltech.edu/programs/on-campus/business-service-industries/culinary-academy-of-south-dakota)
• 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 Thrid 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, 40 Richards Avenue, Suite 300, Norwalk, CT 06854. (203) 855-8499. (www.bevinfogroup.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.configroup.com)

Chain Store Guide, 3710 Corporex Park Drive, Suite 310, Tampa, FL 33619. (800) 927-9292. (www.chainstoreguide.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)

GfK, 200 Liberty Street, 4th Floor, New York, NY 10281. (212) 240-5300. (www.gfk.com)

GuestMetrics Inc., 1602 Village Market Boulevard SE, Leesburg, VA 20175. (703) 297-3400. (www.guestmetrics.com)

InMoment, 310 East 4500 South, Suite 450, Salt Lake City, UT 84107. (800) 530-4251. (www.inmoment.com)

IRI, 150 North Clinton Street, Chicago, IL 60661. (312) 726-1221. (www.iriworldwide.com)


Market Force Information, P.O. 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)

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)
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)

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

NATIONAL FOOD & BEVERAGE HOLIDAYS

D.1 Overview

There are hundreds of designations of days, weeks, and months that recognize a specific food or beverage. Some designations are made by official proclamation while others are de facto designations; none have the force of the law. Most official food holiday designations are promulgated by the U.S. Chamber of Commerce, trade associations, or public relations firms as a promotional vehicle. The President of the United States declares about 150 commemorative days each year; proclamation of food days by the President are rare.

The following are lists of national food & beverage designations recognized in the United States.

D.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
<table>
<thead>
<tr>
<th>Month</th>
<th>Day</th>
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<tbody>
<tr>
<td>February 25</td>
<td>National Chocolate Covered Peanuts Day</td>
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<td>February 26</td>
<td>National Pistachio Day</td>
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<td>February 27</td>
<td>National Kahlua Day</td>
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<td>National Chocolate Souffle Day</td>
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<td>March 1</td>
<td>National Peanut Butter Lover's Day</td>
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<td>March 2</td>
<td>National Banana Cream Pie Day</td>
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<td>March 3</td>
<td>National Mulled Wine Day</td>
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<td>March 4</td>
<td>National Pound Cake Day</td>
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<td>March 5</td>
<td>National Cheese Doodle Day</td>
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<td>March 6</td>
<td>National Frozen Food Day</td>
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<td>March 7</td>
<td>National Crown Roast of Pork Day</td>
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<td>March 8</td>
<td>National Peanut Cluster Day</td>
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<td>March 9</td>
<td>National Crabmeat Day</td>
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<td>March 10</td>
<td>National Blueberry Popover Day</td>
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<td>National Oatmeal-Nut Waffle Day</td>
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<td>March 12</td>
<td>National Baked Scallops Day</td>
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<td>March 13</td>
<td>National Coconut Torte Day</td>
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<td>National Potato Chip Day</td>
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<td>National Pears Helene Day</td>
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<td>March 16</td>
<td>National Artichoke Hearts Day</td>
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<td>March 17</td>
<td>National Green Beer Day</td>
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<td>March 18</td>
<td>National Lacy Oatmeal Cookie Day</td>
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<td>March 19</td>
<td>National Chocolate Carmel Day</td>
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<td>March 20</td>
<td>National Ravioli Day</td>
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<td>March 21</td>
<td>National French Bread Day</td>
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<td>March 22</td>
<td>National Bavarian Crepes Day</td>
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<td>March 23</td>
<td>National Chip and Dip Day</td>
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<td>March 24</td>
<td>National Chocolate Covered Raisins Day</td>
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<td>March 25</td>
<td>National Lobster Newburg Day</td>
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<td>March 26</td>
<td>National Nougat Day</td>
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<td>March 27</td>
<td>National Spanish Paella Day</td>
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<td>March 28</td>
<td>National Black Forest Cake Day</td>
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<td>March 28</td>
<td>Something On A Stick Day</td>
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<td>March 29</td>
<td>National Lemon Chiffon Cake Day</td>
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<td>March 30</td>
<td>Turkey Neck Soup Day</td>
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<td>March 31</td>
<td>National Clams on the Half Shell Day</td>
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<tr>
<td>March 31</td>
<td>Oranges and Lemons Day</td>
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<td>March 31</td>
<td>Tater Day</td>
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<tr>
<td>April</td>
<td>1st Monday: Sweet Potato Day</td>
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<tr>
<td>April</td>
<td>Good Friday: National Hot Cross Bun Day</td>
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</tbody>
</table>
- Easter: National Baked Ham with Pineapple Day
- April 1: National Sourdough Bread Day
- April 2: National Peanut Butter & Jelly Day
- April 3: National Chocolate Moose Day
- April 4: Chocolate Milk Powder Day
- April 4: National Cordon Bleu Day
- April 5: National Caramel Day & Raisin and Spice Bar Day
- April 6: Fresh Tomato Day
- April 6: National Caramel Popcorn Day
- April 7: National Coffee Cake Day
- April 8: Milk in Glass Bottles Day
- April 8: National Empanada Day
- April 9: National Chinese Almond Cookie Day
- April 10: Cinnamon Crescent Day
- April 11: National Cheese Fondue Day
- April 12: National Licorice Day
- April 12: Grilled Cheese Sandwich Day
- April 13: National Peach Cobbler Day
- April 14: National Pecan Day
- April 15: Glazed Spiral Ham Day
- April 16: National Eggs Benedict Day
- April 16: Day of the Mushroom
- April 17: National Cheese Ball Day
- April 18: National Animal Cracker Day
- April 19: Garlic Day
- April 19: Amaretto Day
- April 20: Pineapple Upside Down Cake Day
- April 20: Lima Bean Respect Day
- April 21: Chocolate-Covered Cashew Truffle Day
- April 22: Jelly Bean Day
- April 23: Picnic Day
- April 24: Pigs-in-a-Blanket Day
- April 25: National Zucchini Bread Day
- April 26: National Pretzel Day
- April 27: Prime Rib Day
- April 28: National Blueberry Pie Day
- April 29: National Shrimp Scampi Day
- April 30: National Oatmeal Cookie Day
- April 30: Raisin Day

May
- May 1: National Chocolate Parfait Day
- May 2: National Truffles Day
- May 3: National Raspberry Tart Day
• May 4: National Orange Juice Day
• May 4: National Homebrew Day
• May 4: National Candied Orange Peel Day
• May 5: National Chocolate Custard Day
• May 5: Totally Chipotle Day
• May 5: National Hoagie Day
• May 6: National Crepes Suzette Day
• May 6: International No Diet Day
• May 6: National Beverage Day
• May 7: National Roast Leg of Lamb Day
• May 8: National Coconut Cream Pie Day
• May 8: National Empanada Day
• May 9: National Butterscotch Brownie Day
• May 10: National Shrimp Day
• May 11: National Mocha Torte Day
• May 11: Eat What You Want Day
• May 12: National Nutty Fudge Day
• May 13: National Apple Pie Day
• May 13: National Fruit Cocktail Day
• May 14: National Buttermilk Biscuit Day
• May 15: National Chocolate Chip Day
• May 16: National Coquilles St. Jacques Day
• May 17: National Cherry Cobbler Day
• May 18: National Cheese Soufflé Day
• May 19: National Devil’s Food Cake Day
• May 20: National Quiche Lorraine Day
• May 20: Pick Strawberries Day
• May 21: National Strawberries & Cream Day
• May 22: National Vanilla Pudding Day
• May 23: National Taffy Day
• May 24: National Escargot Day
• May 25: National Wine Day
• May 25: National Brown Bag it Day
• May 26: National Blueberry Cheesecake Day
• May 26: National Cherry Dessert Day
• May 27: National Grape Popsicle Day
• May 28: National Brisket Day
• May 28: National Hamburger Day
• May 29: National Coq Au Vin Day
• May 30: National Mint Julep Day
• May 30: National Macaroon Day
June
• 1st Friday: National Doughnut Day
• June 1: National Hazelnut Cake Day
• June 2: National Chocolate Macaroon Day
• June 3: National Rocky Road Day
• June 4: National Frozen Yogurt Day
• June 5: National Gingerbread Day
• June 6: National Applesauce Cake Day
• June 7: National Chocolate Ice Cream Day
• June 9: National Strawberry Rhubarb Pie Day
• June 10: National Black Cow Day
• June 11: National German Chocolate Day
• June 12: National Peanut Butter Cookie Day
• June 13: National Lobster Day
• June 14: National Strawberry Shortcake Day
• June 16: National Fudge Day
• June 17: National Apple Streudel Day
• June 18: National Cherry Tart Day
• June 19: National Martini Day
• June 20: National Vanilla Milkshake Day
• June 21: National Peaches & Cream Day
• June 22: National Chocolate Eclair Day
• June 23: National Pecan Sandy Day
• June 24: National Creamy Pralines Day
• June 25: National Strawberry Parfait Day
• June 26: National Chocolate Pudding Day
• June 27: National Orange Blossom Day
• June 28: National Tapioca Day
• June 29: National Almond Butter Crunch Day
• June 30: National Ice Cream Soda Day

July
• 3rd Sunday: Sundae Day
• July 1: Creative Ice Cream Flavor Day
• July 1: National Gingersnap Day
• July 2: National Anisette Day
• July 3: National Chocolate Wafer Day
• July 3: Eat Beans Day
• July 4: National Barbecued Spareribs Day
• July 4: Caesar Salad Birthday
• July 4: Sidewalk Egg Frying Day
• July 5: National Apple Turnover Day
• July 5: Graham Cracker Day
• July 6: National Fried Chicken Day
• July 7: National Strawberry Sundae Day
• July 7: Chocolate Day
• July 7: Macaroni day
• July 7: Ice Cream Cone Day
• July 8: National Milk Chocolate with Almonds Day
• July 9: National Sugar Cookie Day
• July 10: National Piña Colada Day
• July 11: National Blueberry Muffin Day
• July 11: Vegetarian Food Day
• July 12: National Pecan Pie Day
• July 12: National Blueberry Muffin Day
• July 12: Eat Your Jello Day
• July 13: National Ice Cream Day
• July 13: National French Fries Day
• July 14: National Grand Marnier Day
• July 15: National Tapioca Pudding Day
• July 15: Gummi Worm Day
• July 16: National Corn Fritters Day
• July 16: Ice Cream Sundae Day
• July 16: Fresh Spinach Day
• July 16: National Ice Cream Day
• July 17: National Peach Ice Cream Day
• July 18: National Caviar Day
• July 19: National Daiquiri Day
• July 20: National Lollipop Day
• July 20: National Ice Cream Soda Day
• July 20: Fortune Cookie Day
• July 21: National Junk Food Day
• July 21: National Creme Brulee Day
• July 22: National Penuche Fudge Day
• July 22: Maple Syrup Day
• July 23: National Vanilla Ice Cream Day
• July 23: National Hot Dog Day
• July 24: National Tequila Day
• July 25: National Hot Fudge Sundae Day
• July 26: National Coffee Milkshake Day
• July 27: National Scotch Day
• July 27: National Cream Brulee Day
• July 28: National Milk Chocolate Day
• July 29: National Lasagna Day
• July 30: National Cheesecake Day
• July 31: Cotton Candy Day
• July 31: Jump for Jelly Beans Day
• July 31: National Raspberry Cake Day
August
• 1st Saturday: National Mustard Day
• August 1: National Raspberry Cream Pie Day
• August 2: National Ice Cream Sandwich Day
• August 3: National Watermelon Day
• August 4: National Chocolate Chip Day
• August 4: National Champagne Day
• August 6: National Root Beer Float Day
• August 7: National Raspberries & Cream Day
• August 8: National Frozen Custard Day
• August 9: National Rice Pudding Day
• August 10: National S’Mores Day
• August 11: National Raspberry Bombe Day
• August 12: National Toasted Almond Bar Day
• August 13: National Filet Mignon Day
• August 14: National Creamsicle Day
• August 15: National Lemon Meringue Pie Day
• August 16: National Rum Day
• August 17: National Vanilla Custard Day
• August 17: Cup Cake Day
• August 18: National Ice Cream Pie Day
• August 19: National Soft Ice Cream Day
• August 20: National Chocolate Pecan Pie Day
• August 20: National Lemonade Day
• August 21: National Spumoni Day
• August 22: National Pecan Torte Day
• August 23: National Spongecake Day
• August 24: National Waffle Day
• August 24: National Peach Pie Day
• August 25: National Banana Split Day
• August 25: National Waffle Day
• August 26: National Cherry Popsicle Day
• August 27: National Pots du Creme Day
• August 28: National Cherry Turnover Day
• August 29: Eat Healthy Day
• August 29: National Whisky Sour Day
• August 29: More Herbs Less Salt Day
• August 29: National Lemon Juice Day
• August 30: National Marshmallow Toasting Day
• August 31: National Trail Mix Day
• August 31: Eat Outside Day
September
• September 1: National Cherry Popover Day
• September 2: National Blueberry Popsicle Day
• September 3: National Welsh Rarebit Day
• September 4: National Macadamia Nut Day
• September 4: Eat an Extra Dessert Day
• September 5: National Cheese Pizza Day
• September 6: National Coffee Ice Cream Day
• September 7: National Napoleon Day
• September 8: National Date-Nut Bread Day
• September 9: National Steak au Poivre Day
• September 11: National Hot Cross Bun Day
• September 12: National Chocolate Milkshake Day
• September 13: National Peanut Day
• September 14: National Cream-Filled Donut Day
• September 15: National Creme de Menthe Day
• September 17: National Apple Dumpling Day
• September 19: National Butterscotch Pudding Day
• September 20: National Rum Punch Day
• September 21: National Pecan Cookie Day
• September 22: National White Chocolate Day
• September 23: National Chocolate Day
• September 24: National Cherries Jubilee Day
• September 25: National Crab Newberg Day
• September 26: National Pancake Day
• September 27: National Chocolate Milk Day
• September 27: National Corned Beef Hash Day
• September 28: National Strawberry Cream Pie Day
• September 29: National Mocha Day
• September 30: National Mulled Cider Day

October
• 2nd Friday: World Egg Day
• October 1: World Vegetarian Day
• October 2: National French Fried Scallops Day
• October 3: National Carmel Custard Day
• October 4: National Taco Day
• October 5: National Apple Betty Day
• October 6: National Noodle Day
• October 7: National Frappe Day
• October 8: National Fluffernutter Day
• October 9: National Dessert Day
• October 10: National Angel Food Cake Day
• October 11: National Sausage Pizza Day
October
• October 13: National Yorkshire Pudding Day
• October 14: National Chocolate Covered Insect Day
• October 15: National Roast Pheasant Day
• October 15: Mushroom Day
• October 15: Chicken Cacciatore Day
• October 16: World Food Day
• October 16: Oatmeal Day
• October 17: National Pasta Day
• October 18: National Chocolate Cupcake Day
• October 19: National Seafood Bisque Day
• October 20: National Brandied Fruit Day
• October 21: National Pumpkin Cheesecake Day
• October 22: National Nut Day
• October 23: National Boston Cream Pie Day
• October 24: National Bologna Day
• October 25: National Greasy Foods Day
• October 26: National Mincemeat Pie Day
• October 27: National Potato Day
• October 28: National Chocolate Day
• October 29: National Pancake Day
• October 30: National Candy Corn Day
• October 31: National Caramel Apple Day

November
• November 1: National French Fried Clam Day
• November 2: National Deviled Egg Day
• November 3: Sandwich Day
• November 4: National Candy Day
• November 5: National Doughnut Day
• November 6: National Nachos Day
• November 7: Bittersweet Chocolate with Almonds Day
• November 8: National Harvey Wallbanger Day
• November 9: National Scrapple Day
• November 10: National Vanilla Cupcake Day
• November 11: National Sundae Day
• November 12: National Pizza with the Works Day
• November 13: National Indian Pudding Day
• November 14: National Guacamole Day
• November 16: National Fast Food Day
• November 17: National Baklava Day
• November 17: Homemade Bread Day
• November 18: National Vichyssoise Day
• November 19: Carbonated Beverage with Caffeine Day
• November 20: National Peanut Butter Fudge Day
• November 21: National Stuffing Day
• November 22: National Cranberry Relish Day
• November 23: National Cashew Day
• November 23: National Eat A Cranberry Day
• November 24: National Espresso Day
• November 25: National Parfait Day
• November 26: National Cake Day
• November 27: National Bavarian Cream Pie Day
• November 28: National French Toast Day
• November 29: National Chocolates Day
• November 30: National Mousse Day

December
• December 1: National Pie Day
• December 1: National Eat A Red Apple Day
• December 2: National Fritters Day
• December 3: National Ice Cream Box Day
• December 4: National Cookie Day
• December 5: National Sacher Torte Day
• December 6: National Gazpacho Day
• December 7: Cotton Candy Day
• December 8: Brownie Day
• December 9: National Pastry Day
• December 9: Apple Pie Day
• December 10: National Lager Day
• December 11: National Noodle-Ring Day
• December 12: National Ambrosia Day
• December 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

**D.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)

D.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
APPENDIX E

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 Industry, 2401 W. Big Beaver Road, Suite 700, Troy, MI 48084. (248) 362-3700. (www.bevindustry.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 F

STATE FOODS

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:

Alabama
• State fruit: Blackberry
• State nut: Pecan
• State tree fruit: Peach

Arkansas
• State fruit/vegetable: South Arkansas Vine Ripe Pink Tomato
• State grain: Rice

Florida
• State fruit: Orange
• State pie: Key lime pie

Georgia
• State fruit: Peach
• State prepared food: Grits
• State vegetable: Vidalia Sweet Onion

Idaho
• State food: Potato
• State fruit: Huckleberry

Illinois
• State fruit: Gold Rush Apple
• State snack food: Popcorn

Indiana
• State pie: Hoosier Pie (Sugar cream pie)
Kentucky
• State fruit: Blackberry

Louisiana
• State fruit: Strawberry
• State jellies: Mayhaw jelly and Louisiana sugar cane jelly
• State meat pie: Natchitoches meat pie
• State vegetable: Sweet potato

Maine
• State dessert: Blueberry pie made with wild Maine blueberries
• State fruit: Wild blueberry
• State soft drink: Moxie
• State treat: Whoopie pie

Maryland
• State dessert: Smith Island Cake
• State food: Blue crabs

Massachusetts
• State bean: Baked navy bean
• State cookie: Chocolate chip cookie
• State dessert: Boston cream pie
• State doughnut: Boston cream doughnut
• State fruit: Cranberry
• State muffin: Corn muffin

Minnesota
• State fruit: Honeycrisp apple
• State grain: Wild rice
• State muffin: Blueberry muffin
• State mushroom: Morel

Missouri
• State fruit: Norton Cynthiana grape
• State dessert: Ice cream cone

New Hampshire
• State fruit: Pumpkin

New Jersey
• State fruit: Highbush Blueberry
• State vegetable: Jersey Tomato
New Mexico
• State cookie: Bizcochito
• State vegetables: Chiles and Frijoles (refried beans)

New York
• State fruit: Apple
• State muffin: Apple muffin

North Carolina
• State berries: Blueberry and Strawberry
• State fruit: Scuppernong Grape
• State vegetable: Sweet potato

North Dakota
• State fruit: Chokecherry

Ohio
• State fruit: Tomato

Oklahoma
• State fruit: Strawberries
• State meals: Barbecued pork, Biscuits, Black-eyed peas, Chicken fried steak, Corn, Cornbread, Fried okra, Grits, Sausages and gravy, Squash
• State pie: Pecan pie
• State vegetable: Watermelon

Oregon
• State fruit: Pear
• State mushroom: Pacific Golden Chanterelle
• State nut: Hazelnut (Filbert)

Pennsylvania
• State cookie: Chocolate chip cookie

Rhode Island
• State fruit: Rhode Island Greening Apple

South Carolina
• State fruit: Peach
• State snack: Boiled peanuts
South Dakota
• State bread: Frybread
• State dessert: Kuchen

Tennessee
• State fruit: Tomato

Texas
• State bread: Pan de campo
• State dish: Chili con carne
• State fruit: Texas Red Grapefruit
• State health nut: Native pecan
• State native pepper: Chiltepin
• State pastries: Sopapilla 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 G

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. Arnoul 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.nhfra.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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