Restaurant, Food & Beverage Market Research Handbook 2013

Richard K. Miller & Associates

since 1972

RESTAURANT, FOOD & BEVERAGE MARKET RESEARCH HANDBOOK 2013

14th Edition

RKMA MARKET RESEARCH HANDBOOK SERIES

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CONTENTS

PART I: MARKET OVERVIEW

1

MARKET SUMMARY

1.1 Overview

There are more than 980,000 restaurant and foodservice locations in the United States. The restaurant share of the food dollar is approximately 48%. The industry employs 13.1 million people.

1.2 Industry Sales

According to the National Restaurant Association (www.restaurant.org), total restaurant industry sales are projected to reach $660.5 billion in 2013, an increase of 3.5%, or 0.8% on an inflation-adjusted basis. Sales reached $636.4 billion in 2012. Distribution for 2013 is as follows:

COMMERCIAL RESTAURANT SERVICES

• Restaurants:	$441.9 billion
• Retail, vending, recreation, mobile, and other:	$ 62.4 billion
• Managed services:	$ 45.6 billion
• Hotel restaurants:	$ 33.2 billion
• Bars and taverns:	$ 19.5 billion
• Total:	$602.5 billion

NONCOMMERCIAL RESTAURANT SERVICES

• Total:	$ 55.4 billion

MILITARY RESTAURANT SERVICES

• Total:	$ 2.5 billion

Sales at full-service restaurants are projected to reach $208.1 billion in 2013, an increase of 2.9% over 2012 and a real growth rate of 0.2%. Sales at quick-service restaurants are projected to reach approximately $188.1 billion in 2013, an increase of 4.9% over 2011 and a real growth rate of 1.7%.

The National Restaurant Association projects food and beverage sales for restaurant and foodservice segments in 2013 as follows (change from 2012 in parenthesis):

EATING AND DRINKING PLACES

• Full-service restaurants:	$208.69 billion (2.9%)
• Quick-service restaurants:	$188.12 billion (4.9%)

- Snack and nonalcoholic beverage bars: $ 29.06 billion (4.3%)
- Bars and taverns: $ 19.46 billion (0.1%)
- Social caterers: $ 8.38 billion (2.9%)
- Cafeterias, grill-buffets, and buffets: $ 8.27 billion (0.1%)
- Total: $461.34 billion (3.8%)

RETAIL AND LODGING

- Retail-host restaurants: $ 35.21 billion (3.5%)
- Hotel/accommodation restaurants: $ 33.15 billion (4.8%)
- Recreation and sports (includes movies, bowling lanes, recreation, and sport centers): $ 14.09 billion (2.2%)
- Vending and non-store retailers (includes sales of hot food, sandwiches, pastries, coffee, and other hot beverages): $ 12.46 billion (3.7%)
- Mobile caterers: $ 680 million (3.9%)
- Total: $ 95.59 billion (3.8%)

FOODSERVICE CONTRACTOR-MANAGED SERVICES

- Colleges and universities: $ 14.54 billion (3.2%)
- Manufacturing and industrial plants: $ 7.78 billion (5.2%)
- Primary and secondary schools: $ 6.46 billion (3.8%)
- Recreation and sports centers: $ 6.08 billion (4.0%)
- Hospitals and nursing homes: $ 5.65 billion (5.5%)
- Commercial and office buildings: $ 2.82 billion (2.8%)
- In-transit foodservice (airlines): $ 2.28 billion (3.2%)
- Total: $ 45.62 billion (4.0%)

NONCOMMERCIAL RESTAURANT SERVICES

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

- Hospitals (includes voluntary, proprietary hospitals, long-term general, TB, nervous and mental hospitals, state and local short-term hospitals, and federal hospitals): $ 17.00 billion (4.5%)
- Clubs, sporting, and recreational camps: $ 9.71 billion (2.5%)
- Nursing homes (includes homes for the aged, blind, orphaned, and the mentally and physically disabled): $ 8.21 billion (2.6%)
- Public and parochial elementary, secondary schools: $ 7.05 billion (3.4%)
- Colleges and universities: $ 7.65 billion (2.9%)
- Community centers: $ 3.05 billion (3.7%)
- Transportation: $ 2.30 billion (4.8%)
- Employee restaurant services: $ 431 million (3.7%)
- Total: $ 55.40 billion (3.5%)

MILITARY RESTAURANT SERVICES

- Officer and NCO clubs (open mess): $ 1.72 billion (3.2%)
- Military exchanges: $ 804 million (4.4%)
- Total: $ 2.52 billion (3.6%)

1.3 Revenue Distribution

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

Full-Service

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

Limited-Service

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

1.4 Restaurant Sales Growth

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

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

*projected

1.5 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%

1.6 Independents and Chains

According to the ReCount® restaurant census database by The NPD Group (www.npd.com), there were 616,008 restaurants in the United States in fall 2012, a 0.7% change from fall 2011. Restaurants counts are as follows (change from a year prior in parenthesis):

- Independents: 339,770 (0.4%)
- Chains: 276,238 (1.1%)

Restaurant traffic distribution is as follows (source: The NPD Group and *Nation's Restaurant News*):

- Major chains: 60%
- Small chains: 11%
- Independents: 29%

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

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

There are 362 restaurant chains in the U.S. with annual revenue of $50 million or more. Distribution by menu type is as follows:

- Casual-dining: 196
- Quick-service and fast-casual: 99
- Pizza: 37
- Snacks, ice cream, and coffeehouses: 30

A survey by Mintel (www.mintel.com) found that 52% of consumers visit independent restaurants to support their local economy. Among those who had not visited an independent restaurant within the past month, 22% had not done so because they deemed them to be more expensive than chain restaurants.

1.7 Chain Restaurant Classification

According to *2012 Chain Restaurant Operators*, published by Chain Store Guide (www.chainstoreguide.com), there are 368,153 chain restaurants in the United States. Distribution is as follows:

Type of Foodservice*

- Quick-service: 285,279
- Casual-dining: 35,909
- Fast-casual: 19,280
- Family-dining: 14,002
- In-store restaurant: 10,577
- Fine-dining: 2,607
- Cafeteria: 243

Type of Menu*

- Hamburger: 86,376
- Sandwiches/Deli: 60,871
- Pizza: 55,982
- American: 35,504
- Snacks: 35,444
- Chicken: 32,954
- Coffee: 20,998
- Taco: 11,162
- Mexican: 6,104
- Italian: 5,492
- Seafood: 4,530
- Steak: 3,797
- Southwest/Tex-Mex: 2,947
- Chinese: 2,132
- Health Foods: 1,939
- Bar-B-Q: 1,609
- Hot Dogs: 1,532
- Bagels: 1,439

• Asian:	1,327
• Steak/Seafood:	625
• Greek/Mediterranean:	605
• Japanese:	455
• Cajun/Creole:	353
• French/Continental:	321
• Caribbean:	215
• Californian:	170
• Southern:	93
• Indian:	82
• Latin American/Cuban:	60
• Spanish:	52
• Eastern European:	48
• Middle Eastern:	45
• Thai:	30
• German:	6
• Miscellaneous:	843

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

Chain Store Guide includes all restaurant groups with two or more locations in the count of chain restaurants. The NPD Group classifies some small local restaurant groups as independents. This difference, in part, accounts for the differing counts in sections 1.7 and 1.8.

1.8 Restaurant Visits

The NPD Group (www.npd.com) assesses the total number of annual visits to restaurants and the average number of visits per capita as follows:

	Total Visits	**Visits Per Capita**
• 2004	59 million	206
• 2010:	60 million	197
• 2011:	61 million	196
• 2012:	62 million	194
• 2014 (projected):	64 million	190

Restaurant traffic has improved slightly since the recession; traffic was up 1% for 12-month period ending September 2012, according to NPD's CREST® foodservice market research, although levels remain below those in 2008. Morning meal visits have completely recovered to pre-recession levels, up 2% for same 12-month period.

Restaurant visits by age demographic are assessed in Section 49.1 of this handbook.

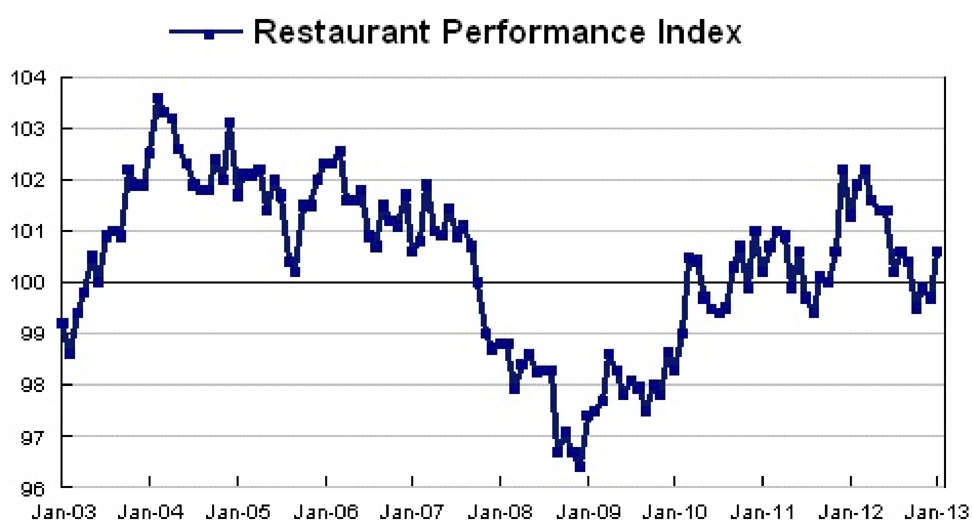
1.9 Restaurant Performance Index

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

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

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

The following graph shows the RPI since 2003.



2

STATE-BY-STATE ANALYSIS

2.1 Restaurant Sales By State

According to the National Restaurant Association (www.restaurant.org), restaurant sales in 2013 for each state are projected as follows (change from 2012 in parenthesis):

- Alabama: $ 6,403,289 (3.8%)
- Alaska: $ 1,312,254 (3.9%)
- Arizona: $10,503,863 (3.9%)
- Arkansas: $ 3,490,477 (3.5%)
- California: $67,371,724 (4.3%)
- Colorado: $ 9,466,827 (4.0%)
- Connecticut: $ 6,067,406 (3.0%)
- Delaware: $ 1,637,283 (3.8%)
- District of Columbia: $ 2,682,995 (3.4%)
- Florida: $33,337,112 (4.7%)
- Georgia: $15,986,034 (3.8%)
- Hawaii: $ 3,716,610 (3.6%)
- Idaho: $ 1,936,189 (3.8%)
- Illinois: $21,714,142 (3.8%)
- Indiana: $ 9,229,921 (3.1%)
- Iowa: $ 3,466,548 (2.8%)
- Kansas: $ 3,835,825 (3.2%)
- Kentucky: $ 6,251,153 (3.7%)
- Louisiana: $ 6,809,387 (3.6%)
- Maine: $ 2,001,455 (3.0%)
- Maryland: $10,285,057 (3.7%)
- Massachusetts: $13,149,853 (2.9%)
- Michigan: $13,119,374 (3.3%)
- Minnesota: $ 8,254,690 (3.4%)
- Mississippi: $ 3,421,203 (3.1%)
- Missouri: $ 9,142,022 (3.0%)
- Montana: $ 1,464,675 (3.7%)
- Nebraska: $ 2,448,770 (3.4%)
- Nevada: $ 5,764,738 (3.8%)
- New Hampshire: $ 2,345,776 (3.0%)
- New Jersey: $14,191,541 (3.4%)

- New Mexico: $ 3,129,817 (3.7%)
- New York: $33,569,546 (3.9%)
- North Carolina: $15,435,412 (3.9%)
- North Dakota: $ 849,118 (4.8%)
- Ohio: $17,417,199 (3.6%)
- Oklahoma: $ 5,134,492 (3.9%)
- Oregon: $ 6,491,411 (3.4%)
- Pennsylvania: $17,835,462 (3.2%)
- Rhode Island: $ 1,942,577 (2.5%)
- South Carolina: $ 7,508,674 (3.6%)
- South Dakota: $ 1,069,386 (3.7%)
- Tennessee: $ 9,858,243 (3.4%)
- Texas: $40,810,368 (5.0%)
- Utah: $ 3,505,627 (4.1%)
- Vermont: $ 858,493 (2.6%)
- Virginia: $13,913,952 (3.7%)
- Washington: $10,887,655 (3.5%)
- West Virginia: $ 2,157,663 (2.6%)
- Wisconsin: $ 7,336,231 (3.1%)
- Wyoming: $ 849,182 (3.8%)

2.2 Restaurant Locations By State

According to the National Restaurant Association, at year-end 2011 (most recent data available) the number of restaurants by state was as follows:

- Alabama: 7,193
- Alaska: 1,327
- Arizona: 8,917
- Arkansas: 4,478
- California: 61,810
- Colorado: 10,549
- Connecticut: 7,015
- Delaware: 1,723
- District of Columbia: 1,929
- Florida: 33,967
- Georgia: 16,131
- Hawaii: 3,099
- Idaho: 2,857
- Illinois: 23,232
- Indiana: 10,731
- Iowa: 6,005
- Kansas: 4,736
- Kentucky: 6,705
- Louisiana: 7,516

- Maine: 2,955
- Maryland: 10,234
- Massachusetts: 14,179
- Michigan: 16,565
- Minnesota: 10,028
- Mississippi: 4,234
- Missouri: 10,462
- Montana: 2,561
- Nebraska: 3,753
- Nevada: 5,316
- New Hampshire: 2,853
- New Jersey: 17,308
- New Mexico: 2,913
- New York: 38,596
- North Carolina: 16,035
- North Dakota: 1,570
- Ohio: 21,535
- Oklahoma: 5,728
- Oregon: 8,569
- Pennsylvania: 24,397
- Rhode Island: 2,640
- South Carolina: 7,643
- South Dakota: 1,788
- Tennessee: 8,937
- Texas: 35,805
- Utah: 4,115
- Vermont: 1,321
- Virginia: 13,646
- Washington: 13,557
- West Virginia: 3,129
- Wisconsin: 12,002
- Wyoming: 1,234

2.3 Foodservice Employment By State

According to *2013 Restaurant Industry Forecast* by the National Restaurant Association, 13.11 million people are employed in the restaurant and foodservice sector, a figure which is projected to increase at an average national rate of 0.9% through 2023.

Current restaurant employment and the projected average annual increase through 2023 are as follows:

	Employment	Increase
• Alabama:	167,200	1.3%
• Alaska:	27,700	1.3%

- Arizona: 262,200 1.5%
- Arkansas: 114,200 1.3%
- California: 1,475,100 0.9%
- Colorado: 239,400 1.3%
- Connecticut: 144,200 0.5%
- Delaware: 44,100 1.3%
- District of Columbia: 52,800 0.6%
- Florida: 844,800 1.4%
- Georgia: 378,200 1.3%
- Hawaii: 85,100 0.5%
- Idaho: 57,800 1.0%
- Illinois: 517,900 0.7%
- Indiana: 296,100 0.7%
- Iowa: 140,300 0.7%
- Kansas: 125,900 0.9%
- Kentucky: 191,300 0.8%
- Louisiana: 197,300 0.7%
- Maine: 58,700 0.8%
- Maryland: 232,700 0.7%
- Massachusetts: 313,500 0.6%
- Michigan: 390,900 0.6%
- Minnesota: 246,300 0.7%
- Mississippi: 109,000 1.0%
- Missouri: 275,100 0.7%
- Montana: 49,700 0.6%
- Nebraska: 88,500 0.6%
- Nevada: 192,100 1.4%
- New Hampshire: 60,900 0.8%
- New Jersey: 318,200 0.6%
- New Mexico: 83,400 1.2%
- New York: 50,900 0.7%
- North Carolina: 411,800 1.3%
- North Dakota: 39,500 1.4%
- Ohio: 526,700 0.6%
- Oklahoma: 151,200 1.0%
- Oregon: 171,900 1.1%
- Pennsylvania: 535,000 0.5%
- Rhode Island: 49,600 0.6%
- South Carolina: 196,600 1.1%
- South Dakota: 43,400 0.9%
- Tennessee: 267,600 0.8%
- Texas: 1,074,200 1.5%
- Utah: 103,300 1.3%
- Vermont: 24,700 0.7%

• Virginia:	348,100	1.0%
• Washington:	280,200	1.0%
• West Virginia:	74,200	0.5%
• Wisconsin:	254,100	0.6%
• Wyoming:	26,400	0.7%

3

REVIEW OF 2012

3.1 Dining Out and the Economy

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

Fewer consumers in 2012 had said they planned to decrease spending on dining out than any time since 2008. Consumer cutbacks in restaurant spending peaked in 2009. When polls by Harris Interactive asked consumers if they planned to decrease restaurant spending during the coming six months, responses were as follows (percentage saying very/somewhat likely):

- November 2008: 65%
- March 2009: 74%
- May 2009: 66%
- September 2009: 67%
- December 2009: 62%
- May 2010: 64%
- September 2010: 66%
- January 2011: 63%
- May 2011: 61%
- November 2011: 61%
- November 2012: 59%

3.2 Restaurant Business Overview

When asked by the National Restaurant Association (www.restaurant.org) in a November 2012 survey to describe overall business conditions in their segment, restaurant operators responded as follows:

	Excellent	Good	Fair	Poor
• Fine-dining:	8%	39%	46%	7%
• Casual-dining:	5%	39%	42%	14%
• Family-dining:	6%	28%	53%	12%
• Fast-casual:	8%	49%	33%	9%
• Quick-service:	1%	42%	63%	13%

When asked to compare their anticipated profitability in 2013 with 2012, responses were as follows:

	Better	Same	Worse
• Fine-dining:	41%	41%	18%
• Casual-dining:	38%	41%	20%
• Family-dining:	39%	46%	15%
• Fast-casual:	42%	43%	15%
• Quick-service:	26%	45%	29%

3.3 Restaurant Counts

According to The NPD Group, restaurant unit counts (taken each fall) 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

"There were 4,442 more restaurants in the U.S. in fall 2012 than there were in fall 2011."

The NPD Group, 1/23/13

3.4 Same-Store Sales

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

Casual-Dining

- Del Frisco's Double Eagle Steak House: 16.6%
- Kona Grill: 10.6%
- Fleming's Rime Steakhouse and Wine Bar: 10.1%
- Bonefish Grill: 7.4%
- Sullivan's Steakhouse: 6.9%
- Red Lobster: 6.8%

• BJ's Restaurant & Brewhouse:	6.5%
• Carrabba's Italian Grill:	6.3%
• LongHorn Steakhouse:	6.0%
• Outback Steakhouse:	6.0%
• Buffalo Wild Wings Grill & Bar (corporate):	5.7%
• The Capital Grille:	5.7%
• Buffalo Wild Wings Grill & Bar (franchised):	4.2%
• Texas Roadhouse (corporate):	4.0%
• Texas Roadhouse (franchised):	3.7%
• Seasons 52:	2.9%
• Maggiano's Little Italy:	2.8%
• Ruth's Chris Steakhouse:	2.6%
• Red Robin Gourmet Burgers (corporate):	2.1%
• Brio Tuscan Grille:	2.0%
• Chili's Grill & Bar:	1.4%
• The Cheesecake Factory:	0.8%
• Bahama Breeze:	0.5%
• Bravo! Cucino Italiana:	0.5%
• Mitchell's Fish Market:	- 0.7%
• Ruby Tuesday (franchised):	- 0.6%
• Applebee's Neighborhood Grill & Bar:	- 0.3%
• Famous Dave's (corporate):	- 0.1%
• Famous Dave's (franchised):	- 1.0%
• Olive Garden:	- 2.5%
• Ruby Tuesday (corporate):	- 4.2%
• Mimi's Cafe:	- 4.8%

Quick-Service

• McDonald's:	7.1%
• Popeye's Louisiana Kitchen:	5.9%
• Jack in the Box:	5.8%
• Steak 'n Shake:	5.5%
• Wendy's (corporate):	5.1%
• Wendy's (franchised):	4.2%
• Burger King:	- 0.3%
• Sonic:	- 0.1%
• Yum! Brands:	- 3.0%

Fast-Casual

• Chipotle Mexican Grill:	11.1%
• Panera Bread:	4.4%
• Qdoba Mexican Grill:	4.3%
• Einstein Bros. Bagels/Noah New York Bagels:	1.0%
• Così (corporate):	- 3.0%

Family-Dining and Buffet

• Luby's/Fudrucker's:	3.5%
• Denny's (corporate):	1.1%
• Denny's (franchised):	0.8%
• Frisch's Big Boy (corporate):	0.4%
• Bob Evans Restaurants:	- 1.5%
• IHOP:	- 1.5%
• Cracker Barrel Old Country Store:	- 1.6%

Pizza

• Papa John's Pizza:	5.3%
• Domino's Pizza:	3.0%
• Pizza Inn:	2.7%
• Chuck E. Cheese's (corporate):	- 6.3%

Coffee and Snack

• Starbucks Coffee:	10.0%
• Dunkin' Donuts:	7.4%
• Tim Hortons (U.S.):	6.3%
• Baskin-Robbins:	5.8%
• Caribou Coffee (corporate):	4.1%
• Krispy Kreme Doughnuts:	4.0%
• Jamba Juice (corporate):	3.3%

* as of February 2013

3.5 Acquisitions

The following were major restaurant chain acquisitions in 2012:

	Buyer	Deal Value
• Burger King (minority holding):	Justice Holdings Ltd.	$1.4 billion
• P.F. Chang's China Bistro Inc.:	Centerbridge Partners	$1.1 billion
• Yard House:	Darden Restaurants Inc.	$ 585 million
• Centerplate Inc.:	Olympus Partners and Centerplate management	$ 551 million
• Fogo de Chão:	Thomas H. Lee Partners	$ 400 million
• O'Charley's Inc.:	Fidelity National Financial Inc.	$ 221 million
• La Boulange:	Starbucks Corp.:	$ 100 million
• J. Alexander's Corp.:	Fidelity National Financial:	$ 72 million
• Lime Fresh Mexican Grill:	Ruby Tuesday Inc.	$ 24 million
• Pizza Hut (36 restaurants):	NPC International Inc.	$ 19 million
• Cheeseburger in Paradise:	Luby's Inc.	$ 11 million
• Tully's Coffee (retail only):	Kachi Partners:	$ 4 million
• Burger King (278 restaurants):	Carrols Restaurant Group Inc.	Undisclosed

• Talbott Teas:	Jamba Inc.	Undisclosed
• Texas Steakhouse & Saloon:	Presidian Capital	Undisclosed
• Wild Wing Cafe:	Axum Capital Partners	Undisclosed

4

PUBLICALLY TRADED RESTAURANT CORPORATIONS

4.1 Overview

Stocks for 19 restaurant corporations are traded on the New York Stock Exchange and 30 are traded on Nasdaq. The combined market capitalization for these 49 companies is $237.64 billion (as of February 2013).

4.2 Restaurant Stocks and Market Capitalization

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

Company	Ticker	Market Cap
• McDonald's Corp.:	MCD	$96.33 billion
• Starbucks Corp.:	SBUX	$42.28 billion
• Yum! Brands:	YUM	$29.74 billion
• Chipotle Mexican Grill:	CMG	$ 9.85 billion
• Tim Hortons:	THI	$ 7.74 billion
• Burger King:	BKW	$ 6.23 billion
• Darden Restaurants:	DRI	$ 6.06 billion
• Panera Bread Co.:	PNRA	$ 4.80 billion
• Dunkin Brands:	DNKN	$ 3.88 billion
• Dominos Pizza:	DPZ	$ 2.71 billion
• Brinker International:	EAT	$ 2.46 billion
• Bloomin' Brands:	BLMN	$ 2.27 billion
• Wendy's International:	WEN	$ 2.01 billion
• Cheesecake Factory:	CAKE	$ 1.78 billion
• Diversified Restaurant Holdings:	DRH	$ 1.78 billion
• CBRL Group:	CBRL	$ 1.55 billion
• Buffalo Wild Wings:	BWLD	$ 1.40 billion
• DineEquity:	DIN	$ 1.36 billion
• Papa John's International:	PZZA	$ 1.31 billion
• Jack in the Box:	JACK	$ 1.26 billion
• Texas Roadhouse:	TXRH	$ 1.26 billion
• Bob Evans Farms:	BOBE	$ 1.22 billion
• BJ's Restaurants:	BJRI	$ 899.3 million
• Krispy Kreme:	KKD	$ 846.6 million
• AFC Enterprises:	AFCE	$ 700.9 million

- Sonic Corp.: SONC $ 628.6 million
- CEC Entertainment: CEC $ 572.6 million
- Biglari Holdings: BH $ 530.2 million
- Red Robin Gourmet Burgers: RRGB $ 530.0 million
- Denny's Corp.: DENN $ 481.8 million
- Ruby Tuesday: RT $ 462.7 million
- Del Frisco's Restaurant Group: DFRG $ 425.5 million
- Fiesta Restaurant Group: FRGI $ 416.5 million
- Ignite Restaurant Group: IRG $ 383.2 million
- Chuy's Holdings Inc.: CHUY $ 371.8 million
- Bravo Brio Restaurant Group: BBRG $ 295.8 million
- Ruth's Chris Steak House: RUTH $ 269.7 million
- Einstein Noah: BAGL $ 221.6 million
- Jamba, Inc.: JMBA $ 204.9 million
- Luby's, Inc.: LUB $ 204.4 million
- Nathan's Famous: NATH $ 184.3 million
- Carrols Restaurant Group: TAST $ 145.6 million
- Frisch's Resturant: FRS $ 93.8 million
- Kona Grill: KONA $ 74.5 million
- Famous Dave's: DAVE $ 71.5 million
- Cosi, Inc.: COSI $ 60.5 million
- Ark Restaurants: ARKR $ 57.4 million
- Pizza Inn: PZZI $ 29.5 million
- Granite City Food: GCFB $ 16.5 million
- Flanigan's Enterprises: BDL $ 14.3 million
- Chanticleer Holdings: HOTR $ 7.4 million

PART II: TRENDS FOR 2013

5

CULINARY TRENDS

5.1 Overview

The National Restaurant Association (www.restaurant.org) surveys member chefs of the American Culinary Federation (www.acfchefs.org) annually asking them to rank over 200 culinary items. The survey serves as the basis for a list of 'hot trends' for the coming year. This chapter presents the 2013 list.

5.2 Culinary Themes

The top culinary themes for 2013 are as follows:

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

5.3 Top Menu Trends

Chefs of the American Culinary Federation rank the top menu trends for 2013 as follows:

Full-Service Restaurants

1. Locally sourced meats and seafood
2. Locally grown produce
3. Healthful kids' meals
4. Environmental sustainability as a culinary theme
5. Children's nutrition as a culinary theme
6. New cuts of meat (e.g., Denver steak, pork flat iron, teres major)
7. Hyper-local sourcing (e.g., restaurant gardens)
8. Gluten-free cuisine
9. Sustainable seafood
10. Whole-grain items in kids' meals
11. Farm/estate-branded items
12. Non-wheat noodles/pasta (e.g., quinoa, rice, buckwheat)
13. Nontraditional fish (e.g., branzino, Arctic char, barramundi)

14. Ethnic-inspired breakfast items (e.g., Asian-flavored syrups, chorizo scrambled eggs, coconut-milk pancakes)
15. Fruit/vegetable children's side items
16. Health/nutrition as a culinary theme
17. Half-portions/smaller portions for a smaller price
18. House-made/artisanal ice cream
19. Black/forbidden rice
20. Food trucks

Quick-Service Restaurants

1. Gluten-free items
2. Locally sourced produce
3. Healthful kids' meals
4. Fruit/vegetable sides in kids' meals
5. Locally sourced meat or seafood
6. Artisanal/house-made items
7. Low-fat/nonfat milk or 100% juice options in kids' meals
8. Whole-grain items
9. Lower-sodium items
10. Lower-calorie items
11. Sweet potato fries
12. Sustainable food items
13. Lower-fat items
14. Energy drinks
15. Mini-desserts/dessert bites
16. Spicy items
17. Organic items
18. Entree salads
19. Vegetarian entrèes
20. "Build-your-own" items

5.4 Top Trends By Category

By food category, the following are the top trends for 2013:

Appetizers

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

Breakfast/Brunch
1. Ethnic-inspired breakfast items (e.g., Asian-flavored syrups, chorizo scrambled eggs, coconut-milk pancakes)
2. Traditional ethnic breakfast items (e.g., huevos rancheros, shakshuka, ashta, Japanese)
3. Fresh-fruit breakfast items
4. Prix fixe brunches
5. Chicken and waffles

Desserts
1. House-made/artisanal ice cream
2. Bite-size/mini-desserts
3. Savory desserts
4. Deconstructed classic desserts
5. Dessert flights/combos

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

Kids' Meals
1. Healthful kids' meals
2. Whole-grain items in kids' meals
3. Fruit/vegetable children's side items
4. Oven-baked items in kids' meals (e.g., baked chicken fingers, oven-baked fries)
5. Children's portions of adult menu items

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

Nonalcoholic Beverages
1. House-made soft drink/soda/pop
2. Gourmet lemonade (e.g., house-made, freshly muddled)
3. Organic coffee
4. Specialty iced tea (e.g., Thai-style, Southern/sweet, flavored)
5. Coconut water

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

Produce
1. Locally grown produce
2. Organic produce
3. Superfruit (e.g., açai, goji berry, mangosteen)
4. Heirloom apples
5. Exotic fruits (e.g., rambutan, dragon fruit, paw paw, guava)

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

Other Food Items/ Ingredients
1. Farm/estate-branded items
2. Artisan cheeses
3. Ethnic cheeses (e.g., queso fresco, paneer, lebneh, halloumi)
4. Non-wheat flour (e.g., peanut, millet, barley, rice)
5. Ancient grains (e.g., kamut, spelt, amaranth)

6

FOOD & DINING TRENDS

6.1 Overview

This chapter provides summaries of forecasts for dining trends in 2013 based on the assessments of the following analysts and media sources:

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

6.2 Andrew Freeman & Co.

How Restaurant Trends Will Shape A New Reality In 2013, a report by Andrew Freeman & Co., forecasts the following restaurant and dining trends:

A Juice Fix For All

- Fresh squeezed and cold processed juices offer unique flavor combinations and convenience as well as health benefits.

Blow Out The Bar

- Forget fine-dining and blow out the bar, enhancing the menu with casual food for appetites of all sizes. Offer one menu of sophisticated, approachable, and shareable food including enticing bar snacks and heartier options.

Call for a Toast!

- Everyone's "toast"ing. Toast it, slather it with sweet or savory items and watch guests enjoy any time of day. Perfect for snacking and for sharing.

Counter Culture

- Guests are sitting front and center at kitchen counters, watching and interacting directly with the chefs who serve them. Chefs are showing off with 20 or more courses spread out over multiple hours. It's a one of a kind experience that lasts a lifetime, or maybe it seems like it.

Couples' Kitchen

- Culinary couples are opening exciting new restaurants, sharing a common dream and making it a reality. Benefits include shared work and responsibility, labor savings, and a more personal home-spun feel. It's the new mom & pop shop.

Drunken Bar Snacks

- The bar and snacks are coming together with drunken bar snacks featuring classic bar foods flavored with ingredients from the bar.

From Rush-In With Love

- Chefs trained in fine-dining are speeding things up with new fast-casual restaurants featuring counter service, speedy delivery, and a concise menu focusing on one narrowly defined concept.

Get Board

- Boards are the new baskets. Offer a selection of house made breads and custom flavored spreads served straight from a bread board.

Go Against The Grain With Gluten-Free Menus

- Offer attractive options for this growing subset of the population.

Keep On Truckin'

- Food trucks haven't run out of gas, they're becoming permanent fixtures. Take advantage of smaller build-out fees and increased mobility to increase brand awareness. Offer mobile outlets in destination areas or outsource foodservices to local vendors.

Next Mex

- With an increasingly savvy world-traveling clientele, skilled native cooks, and a bevy of people who love Mexican food, expect more restaurants to focus on the sophisticated side of Mexican cuisine and the melding of Mexican home cooking with local ideals.

On a Roll

- Sandwich shops are creating their own customized rolls designed to show their stuffings.

One Bite Wonders

- Pay-per-the-piece pre-appetizer courses priced less than $5 each are enjoyed by guests and can be a revenue generator.

Prove It

- Gain credibility with official certification: LEED, Monterey Bay Aquarium Seafood Watch Alliance, Demeter, EverBlue, LEAF, etc.

Road Scholars

- Chefs are traveling the world and bringing ingredients and new menu dishes inspired directly by their travels, regardless of the types of food they serve.

The New ABCs

- Argentina, Brazil and Chile! Or Asados (Argentine barbeque), Borgoña (Chilean beverage of chilled red wine and strawberries), and Chimichurri (Argentine salsa verde). Or perhaps Alfajores (dulce de leche cookies), Brigadeiros (Brazilian chocolate and condensed milk candies), and Cachaça/Caipirinhas (Brazilian cocktails).

The Perfect Fixe

- Restaurants are returning to fixed price menus and not just for fine dining. Reap the rewards of an improving economy, manage costs and tables better, and improve returns.

Track Record

- Educate cooks and servers so they know where things come from. Share favorite purveyors on the website or on Facebook. But keep it out of every dish description on the menu. People get tired of hearing it.

We're Really Open

- Open kitchens are back. Chefs are delivering food. Move the "back of house" up front.

<u>6.3 Baum + Whiteman</u>

Baum + Whiteman annually develops lists of restaurant and hotel food trends. The following is Baum + Whiteman's Food and Dining Trends for 2013:

Artisan Drinks Bubbling

- Upscale restaurants, pushing for differentiation, are making their own artisan sodas using fresh and local ingredients. And several bottlers of flavored waters are adding real juice to their products.
- Behind all this stirring: Consumers are abandoning colas in droves, seeking "fresh" beverages or fruit-flavored carbonates and smoothies with the illusion of health.

- For quick-service restaurants, beverage sales are a big bright spot with growing numbers of snack-time beverage-only sales.

Aye, Robot

- Driven by 'the need for speed' industry-wide moves accelerate getting food into customers' hands.
- Sprinkles, a Los Angeles-based cupcake chain, made headlines with its pink 24-hour Cupcake ATM that sells 1,000 cupcakes daily to people who want to beat in-store lines or demand an after-hours sugar fix. Meanwhile, McDonalds is bringing its touch screen order-and-pay kiosks from Europe to the United States to speed service and cut lines.
- The following are some overseas examples of creative foodservice automation:
  - A Lay's machine in Argentina churns out warm, salted chips from real potatoes and sells them by the bag.
  - A butcher in Spain has a 24-hour vending machine for prepared meals, sausages, steaks, meatballs; in-store customers can use it during business hours, bypassing sales clerks.
  - In France, a 24-hour machine sells freshly baked baguettes.
  - In Korea, Coca-Cola introduced an interactive dance machine – customers imitate dance steps shown on a large screen and the machine rewards them with bottles of soda.
  - In Singapore, customers lovingly hug a vending machine to dispense their bottle of Coca-Cola.

Bars Are Where The Flavor Action Is

- Looking for future flavors? Keep keen eyes on artisan cocktails. Ambitious bartenders (whose numbers grow exponentially) are infusing vodka, gin, and rum with mango, kiwi, and other house-made exotica (even dried fruit) as they stretch the notion of hand-crafted cocktails.
- Flavor researchers (and chefs, too) should refocus on the bar: cocktails of pureed and muddled melons, syrups of lemongrass, rosemary, pomegranate, cinnamon, cardamom, and ginger, among other esoterica; flavored vinegars going into old fashions shrubs, smoked ice cubes, yuzu bitters, chocolate-chile bitters, sangria variations no one's heard of in Spain.
- Restaurant and hotel chains, straining to step away from bottled and powdered shortcuts, are playing catch-up … but training hundreds of bartenders can be a killer.
- All this artisan stuff is expensive, and cocktails are regularly crossing the $15 line … so there's lots of inflation at the bar. Wines-by-the-glass, too, are galloping in price. An $8 glass once came from an $8 bottle; now we're seeing $12 glasses from $10 bottles … what recession?

Bread Trends

- Look for more elaborate breads and rolls. Restaurants are baking in-house to save costs and to ramp up distinctiveness, especially with sandwiches, emphasizing an 'artisan' at work.

Bundling Gets Bigger

- Since the recession, bundles are getting increasing play at casual-dining chains: Chili's and Golden Corral's 2-for-$20, periodic bargain dinners-for-two at Red Lobster and T.G.I. Friday's, and Olive Garden's 'Buy Dinner And Get A Free Entree To Take Home' promotion. The Palm had a three-course dinner for $39.95 and Morton's introduced a $29.95 lunch package. Outback offers four courses for $15; their objective is to fill seats at any cost and to stem to tide of people trading down.

Everyone Wants To Be Chipotle

- Consumers are trading down like crazy … bypassing casual dinnerhouses … leaping from full-service restaurants directly to fast-casual formats … sacrificing service but believing the food is still "fresh."
- We're seeing fast-casual service systems applied to pizza, fish and chicken, Greek food, noodles, Asian food, hot dogs, and taquerias.
- Because fast-casual concepts seem fresh and new, they serve as an entry point to sample new ethnic cuisines, especially for Millennials. Customizable sushi, Indian-inflected wraps, and a banh mi version of Subway are examples.
- Hotels are pondering fast-casual takeaway spaces as tablecloth restaurants slump.

Fast-Food Strikes Back

- At the bottom of the price chain, fast-feeders are taking new measures to compete with fast-casual competition. Menu boards are sprouting higher-priced options and burger chains, smitten by the "gourmet" boom, are adding higher-priced items ($4.50-$6.00) while at the same time maintaining their 99¢ or $1 leaders. Watch for gilded burgers (guacamole, pineapple, mushrooms, crispy onions), pepped-up sauces, ethnic touches, lots of fancier buns, and a bit more customization.

Fields Of Greens

- Kale is trickling down to mass-market restaurants, as are beet greens, chard, turnip greens, and mustard greens. Seaweed is an ingredient in bread; in flavored salt; in crackers; in breakfast cereals; in butter; toasted and sprinkled on fries, fish, and pasta; and in packaged snacks flavored with wasabi, olive oil, and sesame seeds.

Large Format Meals

- Whole animal or whole bird dinners are expanding, triggered by successful nose-to-tail dinners across the country and by large format meals. The following are examples:

- Momofuko's $200 Korean 'bo saam' family-style meals include a dozen oysters, a whole roasted pork shoulder, BBQ sauce, kimchee, and lettuce in which to wrap the meat. It's available at lunch or only before or after peak dinner hours.
- A Summer 2012 special at Daniel Boulud's DBGB ($495) included an entire pig for up to eight people plus headcheese as a starter, a mountain of side dishes, and baked Alaska.
- Grace Restaurant (Portland, ME) offers a "whole beast" lamb dinner for six to eight people including harissa-spiked lamb tartare, cured lamb "bresaola," rigatoni with smoked lamb shoulder, and leg of lamb stuffed with pine nuts and corn. Like many such feasts, it requires 72 hours' notice; the cost is $65 per person.
- Specialty dinners at Mozza, in Los Angeles, include a whole hog multi-course extravaganza of various body parts served family style for up to 30.
- For groups of four to eight people, Wong (New York City) offers a duck-focused meal: duck in lettuce wraps, duck buns, duck meatballs, whole duck two ways, duck broth, and duck fat ice cream with plums. The cost is $65 per person; 48 hours notice is required.

Law Suits

- Natural. Organic. Artisanal. Local. Claims like these are under intense scrutiny by bloggers, journalists, nutritionists – and, of course, lawyers. Keep your eyes on General Mills and Pepsico suits (among others) over genetically modified ingredients conflicting with "natural" claims. There are also suits against Cabot, Yoplait and other yogurt companies over whether their "Greek" yogurt is the real thing. Nutella agreed to a label overhaul in 2012.

Snackification Of America

- We're eating less at every meal but more than making up for it with endless snacking and Americans' waistlines prove it. Snacks account for one in five eating occasions; multiple snacks now qualify as America's "fourth meal."
- All-hours grazing is seen across the economic spectrum: Food trucks define a new market for creative, portable food; hotel lobbies have morphed into living-dining rooms, giving rise to social snacking and all-day drinking; and breakfast is going upscale, being served at all hours.

Suppliers Opening Own-Brand Stores

- Blame it, perhaps, on the wildly successful Apple Store. Food suppliers and manufacturers are launching their own restaurant startups. Their primary aim: To raise their brands' visibility and build powerful appeals to consumers. Some of these are for promotional purposes, but some are actual restaurant operations slated for expansion. The following are examples:
  - Anheuser Busch-InBev is featuring its global breweries at airports with a chain of Belgian Beer Cafes serving their own brands – Stella, Hoegaarden, Leffe – along with food options.

- Barilla announced plans to launch branded pasta restaurants in 2013 to enhance the company's pasta products in supermarkets and, presumably, among restaurant food buyers and customers. A competitive manufacturer, Pastificio Rana, is opening a long-delayed fresh pasta restaurant in New York's Chelsea market, the first unit of a chain.
- Dannon and Chobani have opened flagship yogurt bars in Manhattan. Dannon sells a choice of traditional and Greek-style yogurt, a retail segment that's doubled in five years with no sign of slowing. Chobani, the largest U.S. purveyor of its kind, sells only Greek yogurt curated by "yogurt masters."
- Ghirardelli Chocolate opened a soda fountain/chocolate shop at Disney California Adventure. This will be followed by shops at the Palace Hotel in San Francisco and Harrah's Carnaval Court in Las Vegas.
- Smithfield Foods opened a pork-centric restaurant. Taste of Smithfield, combined with a specialty retail store. The store is in Smithfield, Virginia.
- *Vogue* magazine announced plans to open a Vogue Café in a mammoth shoe store in Dubai; a *GQ* bar also in a hotel there. Publisher Condé Nast already has branded food and beverage venues in Kiev, Moscow, and Istanbul.

6.4 Bon Appétit

Bon Appetit's editors identified the following food trends for 2013:

Blond(ie) is the New Brown(ie)

- For dessert snobs, blondies have always been a pale imitation of their darker inspiration. But now the fairer-hued bar is coming into its own. In New York City, Stellina sells a Dirty Blondie with peanut butter and toffee. And in San Francisco, Black Jet Baking Co. adds brown butter and Maldon sea salt to set a new standard for what the classic un-brownie should be.

Chicken-Focused Concepts

- Now that better-raised, better-tasting birds are more available, restaurateurs like Jean-Georges Vongerichten (Simply Chicken in New York City) are opening concepts. Other new concepts include Bantam & Biddy (Atlanta, GA), Chicken Scratch (Dallas, TX), Fresa's (Austin, TX), Pecking Order (Chicago, IL), and Wing Wings (San Francisco, CA).

Fresh Horseradish

- Pale, knotty, and not especially sexy, horseradish is all of a sudden everywhere on menus, adding a peppery hit to ceviches, as a garnish for short ribs, or as a topping for smoked salmon tartines.

Grapefruit's New Main Squeeze

- It turns out that The Paloma, not the Margarita, is Mexico's most beloved cocktail, and it's making inroads north of the border. Basic versions contain nothing more than tequila, grapefruit-flavored soda, and ice.

Hang Time With Chefs

- Not long ago, the great chefs kept to themselves. But thanks to a new crop of culinary events, foodies can mingle with and even question such culinary rock stars. Favorite events include the Southern Foodways Alliance symposium, Mesamérica in Mexico City, and Copenhagen's MAD Symposium, curated by Noma's René Redzepi.

Kitchen Collaborations

- The Good & Evil chocolate bar ($18, www.eclatcocolate.com) combines the talents of Eric Ripert, Anthony Bourdain, and Christopher Curtin, owner of Éclat Chocolate. More culinary mashups are in the works as brewers join forces with restaurants (Brooklyn Brewery and NYC ramen spot Ippudo) and musicians get with coffee roasters (James Murphy and Blue Bottle Coffee).

Sriracha's Competition

- The Korean chile paste gochujang is catching fire outside of Koreatowns. Think bold miso meets that stuff in the rooster bottle. Dab it on egg sandwiches or sliders, toss with chicken wings, or try it in the bibimbap.

Tea Party People

- Tea is the new coffee, complete with equipment, techniques, and tons of varieties.

The Alterna-Egg

- Chefs are moving out of the henhouse, ditching chicken eggs in favor of their larger and tastier siblings: duck eggs.

The Cemita: Spanish for Big Mac

- This sandwich, from the Mexican state of Puebla, joins the banh mi, cubano, and panino as part of our lunchtime canon. The cemita is a specialty menu item at Cascabel Taqueria (New York, NY), Cemita (Brooklyn, NY), Cemitas Puebla (Chicago, IL), El Chucho (Washington, DC), and Nido (Oakland, CA).

The King of Crustaceans

- Sorry, Maine lobsters, Carolina blue crabs, and Georgia shrimp, but Dungeness crab now rules the crustacean kingdom. Chefs across America have caught on, tossing it with pasta, piling it on grilled toast, even smoking it.

The New Daily Grind

- Milling your own flour may seem like something out of an episode of Frontier House, but freshly ground whole grains are packed with the vitamins, fiber, and flavor that the industrial stuff lacks.

The Next Course: Bread

- The hottest thing since sliced bread is, well, bread. Bread that's so good that it gets its own course, like the sourdough fried in pork fat and served with house-made butter at Matthew Lightner's Atera (New York City) and the bread courses at Oxheart (Houston, TX) and Blanca (Brooklyn, NY).

The Next D.I.Y. Staple: Yogurt

- First Greek was the darling of the active culture-obsessed crowd, then the Icelandic version stormed the dairy case. Yogurt's next move? A home invasion. Homemade yogurt is creamier and less tangy than the store-bought stuff. Plus, despite all those counter-hogging devices you've seen, it requires no special equipment to make – just a little patience. With your own jar in the fridge, we predict it'll work its way into your salad dressings, chicken marinades, or rich stews.

What Your Bartender Is Drinking

- The Italian digestivo Fernet-Branca is the after-work shot of choice among those who make drinks. It can also be used in cocktails to lend an astringency or roundness.

6.5 Culinary Visions

Since 2002, Culinary Visions has collected insight into menu trends from chefs, foodservice professionals, and consumer foodies. This insight provides the basis for an annual list of food trends.

Culinary Visions' *2013 Food Trends* is as follows:

24/7 Snacking

- Meal times have expanded from the traditional three to seven as snacking increases among time-starved Americans' hectic schedules. Small plates are no longer a trend; they are just part of the way Americans eat today. Major restaurant chains have re-imagined menus with snack items like popcorn, pickles, cotton candy, olives, and deviled eggs. Consumers can choose to have a bite or try it all.
- New age vending machines offering customization and fresh food are breaking vending out of its desperate food reputation. Look for greater variety of offerings and more healthful options to feed this 24/7 on demand food culture in all segments of the industry.

Canning, Curing, and Cutting in House

- As the push toward local is finding its way into almost every segment, chefs are moving toward preservation. Pickling is proving to be a popular way for chefs to add their personal touch and showcase a unique aspect of using local ingredients year round.

- A few years ago there was little expectation that nose-to-tail would move beyond a few independent chefs who embraced it as a novelty. Nose-to-tail is a sustainable practice that is expanding awareness of a wider range of meat cuts and going mainstream. Fast-casual restaurants, college and university campuses, and other foodservice segments are experimenting and finding a receptive consumer audience.

Catering to Kids

- Chain restaurants have cracked the code on healthful, family-friendly dining. Family-dining is now benefitting from chefs who bring their culinary training and their family heritage along with their own kids into affordable, casual restaurants. Catering to food allergies and preferences is second nature to parent-chefs, which makes their restaurants even more appealing. Families are finding new ways to share their evening meal together and dispense with the takeout containers or cleaning up their own kitchen.
- The chefs who create these family friendly restaurants are welcomed into local neighborhoods where residents recognize their value to the community because they have seen the positive impact chefs can have on young consumers' respect and understanding of food. Chefs who work in school kitchens are bringing a new level of nutrition literacy and good taste to the consumers of tomorrow.

Fashionable Plates

- The parallels between food and fashion have always captivated the senses. From artfully presented entrèes to couture condiments, innovative chefs are feeding the senses of consumers with an appreciation for fashionable plates.

Home and Away Flavors

- Look for a rediscovery of regional American cooking as chefs continue to explore the culinary cultures from cities and towns around the country. Memphis, Harlem, and New Orleans are all playing a part in bringing these regional American cuisines to the forefront.
- This will be the year for destination flavors that are fresh, hot and sweet. Niche cuisines are slowly making their way onto menus, giving consumers an opportunity to expand their palates. Chefs are using ingredients as a way to bring these flavors to the menu; look for ginger, cinnamon, exotic citrus, sriracha, chiles, and sweet-heat blends like honey and harissa.

Liquid Luxuries

- The beverage industry has been a hotbed of innovation across all fronts. Healthful, handcrafted, heady, hearty, and happy are just a few adjectives to describe the latest in beverages. Amber spirits, house made tonics, and bitters have created a whole new bar scene. Non-alcoholic beverages are getting a flavor boost with fresh ginger soda, handcrafted sodas, and exotic lemongrass-flavored iced teas. Juices and smoothies have become the elixir of our day with unique, delicious, and sometimes palate-challenging blends of fruits and vegetables. Even desserts like milkshakes and floats have moved to the beverage menu.

Menus on the Move

- Food trucks have become part of the culinary landscape in major cities, and have migrated to industrial areas and college campuses. They are more than a new delivery system; they are leading the charge in finding new ways to deliver a truly unique dining experience.
- Look for innovative menus to move to even more unexpected venues enticing all kinds of consumers. For the farm-to-table crowd, farmers are renting their fields to chefs and their guests. For adventurous fine diners, Diner en Blanc (a flash mob of upscale diners decked out in white bring their own lavish meal to a public place) has been exported from Paris to nine cities in the U.S. and twenty worldwide. The pop-up dinner is the experiential antidote to a tight economy taking advantage of underutilized real estate all over the country. There are always options for the well-heeled consumer to drop a bundle for the promise not to be dropped from a dinner table suspended by a crane.

Pure Food

- Real food, pure and simple, is the secret to successful new products. Nothing sells like pure and simple as consumers clamor for clean fuels for their bodies and demystified ingredient statements for their minds.

Reversing the Flow

- Conventional wisdom in the food business has looked to fine-dining and cutting-edge independent chefs to drive the trends. Today many leading chefs are inspired by the street markets of Asia and Latin America and the classic American state fairs which have stimulated fun and exciting ways to serve food.

Vegetable Concoctions

- From hyper local to exotic foreign lands, vegetables have become an undeniable part of the healthful culinary landscape. And selling the farm is all the rage with entrepreneurs and large enterprises alike. From school lunch to gourmet retail shops, consumers are ravenous for vegetables. The latest twist is stem-to-root cooking with fruits and vegetables. This trend is about making a lot more than flavorful stocks – look for leaves, pits, rinds, stems, seeds, and peels to turn up on trendy menus.
- Kale is taking over healthy menus in quick-service restaurants and on college campuses. School foodservice operators are turning vegetables into super heroes with kid-appealing names like power punch broccoli and x-ray vision carrots. French fries are evolving from potatoes to sweet potatoes, eggplant, zucchini. and a wider range of vegetables. Everything about today’s vegetables is chic and appealing including those sporting a black color like garlic and mushrooms.

6.6 Epicurious

Epicurious, a Condé Nast blog, predicts the following culinary trends for 2013:

Collaborations

- The food world can take a lesson from Grant Achatz and Daniel Humm, chefs who switched restaurant spaces for 21st Century Limited. Achatz's Alinea cooked its signature fare in Humm's 11 Madison Park space for a week in September and Humm followed suit in October in Chicago. And in the aftermath of Superstorm Sandy, restaurants like Hill Country and Rob's Bistro in Madison, New Jersey, offered temporary work to servers, bussers, prep cooks, and other kitchen workers displaced by the storm.

Culinary Profession: Artisan Food Producer

- The rise of the artisan market includes the emergence of the dedicated purveyor, the expert in one focused food specialty. Enter the sriracha maker, the mayonnaise master, and the mustard queen. This is their time.

Esoteric Ingredient: Sumac

- With several new books on Middle Eastern cooking (*Jerusalem*, *The Lebanese Kitchen*, to name two), sumac will likely make an appearance in a pantry near you. Look for this tart but fruity powdered spice at specialty purveyors like Penzeys and use it to spice up eggs or make za'atar.

Hot Cuisine: Brazilian

- With the upcoming World Cup in Brazil, Brazilian fare is about to take the world by storm. Churrascaria, check! Pão de queijo, check!

Hot Dessert: Vegetables

- 2013 will be the year of vegetables. They're even in dessert. Battersby in Brooklyn offers a Fennel Panna Cotta, Michel Richard (Washington, DC) makes a Maple Parsnip Cake, and there's Avocado Mousse at Tilth in Seattle.

Hot Dish: Vegetable Plate

- The vegetable plate is not just for vegetarians anymore. Seasonal vegetable mains at Fat Radish (New York City) and Philadelphia's Supper are good examples.

Hot Liquor: Mezcal

- Handcrafted from wild agave plants, mezcal has always been an artisanal product historically seen as tequila's poorer cousin. But with a massive PR push by the Mexican government and producers making more of this smoky spirit available stateside, it's only a matter of time before mezcal finds its way into a cocktail near you.

Hot Vegetable: Cauliflower
- This cruciferous friend is finally taking center plate with restaurants like Chicago's Girl and the Goat (where it's roasted), Sunday Suppers (where it's fried) in Brooklyn, and the National in Athens, Georgia (where it's soupified), showcasing the vegetable as a starring player.

Restaurant Technology
- Comodo's Instagram menu and the rise of the iPad in the dining room mean it's only a matter of time before more restaurants opt for pixilation over paper.

6.7 Flavor Forecast

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

The Flavor Forecast 2013 is as follows:

Empowered Eating
- Farro Grain, Blackberry & Clove – Healthy ancient grain rediscovered with powerful hits of fruit and spice
- Market-Fresh Broccoli & Dukkah (blend of cumin, coriander, sesame and nuts) – Satisfying flavors and textures, mixing unexpected varieties of broccoli with Middle Eastern spice blend

Global My Way
- Japanese Katsu Sauce & Oregano – Tangy flavors of BBQ and steak sauce create the next go-to condiment
- Anise & Cajeta (Mexican caramel sauce) – Sweet, rich delight transports desserts and savory dishes to new places

Hidden Potential
- Hearty Meat Cuts, Plantain & Stick Cinnamon – A new take on meat and potatoes, these ingredients inspire creative approaches that unlock their full flavor potential
- Artichoke, Paprika & Hazelnut – Ingredients you thought you knew invite new explorations, unleashing their deliciously versatile starring qualities

No Apologies Necessary
- Decadent Bitter Chocolate, Sweet Basil & Passion Fruit – An intensely indulgent combo that delights all the senses
- Black Rum, Charred Orange & Allspice – An instant tropical getaway, this sultry collision balances richness and warmth

Personally Handcrafted

- Cider, Sage & Molasses – Rustic and comforting, this combo brings natural goodness to every meal of the day
- Smoked Tomato, Rosemary, Chile Peppers & Sweet Onion – Smoky, sweet, and spicy flavors energize handcrafted ketchup, sauces, jams, and more

6.8 Mintel

Mintel identified the following four trends that are expected to impact the restaurant industry in 2013:

24/7 Hunger

- From roaming food trucks to self-serve coffee kiosks and fancier vending machines, fresh, high quality food is available in more places and whenever customers want it. Such all-access eating means that traditional restaurants need to adjust their business models and find ways to stay nimble to keep up with the many new ways people can feed their cravings.

Clean Food, Clean Conscience

- While 2012's "pink slime" story may have simmered down, each new food safety scare leaves a residue that will continue for years to come. Growing consumer concern about food quality, processing and safety means that operators can't cut corners when it comes to ingredient sourcing. Whether it's "cage-free eggs" or "made-on-premises," choosing the right menu language is as important as choosing the right ingredients in building customers' trust.

Liquid Assets

- Beverages have always been a reliable profit center for restaurants, but relying on these add-on sales isn't as easy as pouring a big gulp any longer. Today's gourmet cocktails, craft beers, and super-nutritional juices and smoothies have raised expectations for the beverage category. Keeping up with the waves of innovation will become a vital part of all segments of the foodservice industry.

Where's The Beef?

- Most commodity prices have risen, but none more than beef. With consumer confidence still low, now is not the time for restaurants to institute drastic price hikes. From smaller steaks to premium chicken positioning, operators will use clever menu tactics to defray high ingredient prices in 2013.

6.9 Sterling-Rice Group

Sterling-Rice Group foresees the following as cutting-edge dining trends in 2013:

American Artisans Save You A Trip To Europe

- For years, budding food artisans have sprung up in the U.S., crafting everything from cocktails to charcuterie. And as their craze becomes a lifestyle, you can count on every major American city to proudly sport local, artisan foodie destinations in 2013.

Asian Influences American Comfort Food

- The fresh, spice-forward flavors of Thailand, Vietnam, and Korea will work their way into our menu. Expect to walk into a classic American diner and see options like Vietnamese chicken sandwiches, sriracha mayo, or Korean-glazed pork ribs.

Chefs Watch Your Weight

- Butter, bacon, and cream have been chefs' best friends since the beginning of time. But in 2013, chefs will be working quietly behind the scenes to make dishes better for you with ingredients like brown rice, high-fiber grains, and vitamin-rich veggie broths.

Fruit ≠ Sweet

- In 2013, chefs will be far less interested in highlighting the sugary, honey tastes of melons, peaches, and the like. Instead, they will lace fruit with savory flavors, bringing naturally refreshing and sweet touches to appetizers, soups, veggie sides, and even meaty entrèes.

Kids' Menus Grow Up

- In 2013, we'll see less hot dogs, mac 'n cheese, and grilled cheese on our little ones' plates. Instead, more fruits, a variety of veggies, protein-rich grains, and authentic Asian flavors will push kids' menus into the realm of adult dining.

No Diner Left Behind

- To accommodate vegetarians, vegans, gluten-freers, wheat-freers, kiddos, and eco-conscious diners, restaurants will offer all-inclusive menus and service. So don't be surprised when your server asks for your allergy list the next time you order.

Popcorn Is The Snack Of 2013

- Light, crispy, and equally delicious with sweet or savory flavors, this popped whole grain is addictive, not to mention low in fat and calories. Which is why in 2013, expect popcorn to explode (no pun intended) as a bar snack, crouton, ice cream, and more.

Small Plates For Me Only

- As American dining evolves from tapas, sharing will go by the wayside in 2013. With menus offering small, singular servings of meat, veggies, and starches, we'll be able to enjoy a perfectly sized meal of whatever it is we're craving. On our own.

Sour Gets Its Day

- Finally, the American dining scene will move beyond sweet, salty, and fatty. Next year we'll have a plethora of tart, acidic, and bitter flavors to choose from, as menus and grocery stores feature flavors like fermented cherry juice, varietal vinegars, and even sour beer.

Veggies Take Over The Plate

- Forget resigning veggies to your salad plate. In 2013, you'll find garden-grown foods as entrèes (cauliflower steaks), starches (squash noodles), and even delicious beverages (celery juice cocktails).

6.10 Supermarket Guru

Phil Lampert, editor of the *Supermarket Guru* (www.supermarketguru.com), identified the following trends to watch in the food industry in 2013:

Breakfast Becomes the Most Important Meal of the Day

- Ninety percent (90%) of U.S. consumers say they eat breakfast every day, but the conversation is shifting to what foods are best to eat for breakfast, and taking breakfast foods into other day parts. Breakfast foods are typically high in protein (e.g., eggs, egg whites, yogurts, milk) and as the nation continues to focus on high protein foods, look for these less expensive proteins to replace the higher priced meats for some meal occasions.

Evolution of Frozen Foods

- According to The NPD Group's *National Eating Trends*, fewer meals are made from scratch (59% in 2012, down from 72% in 1984) as many Americans don't have time to spend in the kitchen. In 2013, the myth that home-cooked is always more nutritious than frozen gets debunked and marketing extols facts like frozen fruits and vegetables are typically harvested in season and flash frozen – and cost less, reinforcing the FDA statement that there is virtually no nutritional difference between fresh and frozen fruits and vegetables.

Men in the Supermarket and Kitchen

- Men and dads are getting more comfortable and powerful in the kitchen. Look for supermarkets to increase their focus on men in 2013 as they've become more active in shopping, meal planning, and cooking. According to a June 2012 survey from Cone Communications, more dads than moms (52% compared with 46%) plan meals for the week ahead. Some supermarkets experimented with "man aisles" —

look for this concept to expand to multiple locations in the store featuring male-oriented foods, recipes, and other promotional tools to make shopping and impulse buying more targeted.

New Proteins

- The U.S. Department of Agriculture estimates the cost of both beef and chicken will increase by at least 5% due to the 2012 drought and declining supply. A major shift is anticipated in the nation's protein food supply away from meat-based proteins and shifting to meatless proteins like eggs, nut butters, tofu, beans, and legumes, with an increase in awareness and consumption of vegetarian and vegan meals.

Smart Home, Smartphone

- Smartphones and technology are prevalent in the food industry, but the newest wave of technology includes smartphones that network with kitchen appliances and allow consumers to do everything from checking how much milk they have left in the refrigerator, to turning the oven on from another room. The next generation of mobile apps may determine if fruits and vegetables are ripe, if frozen foods have been kept at the correct temperature, and even test for foodborne bacteria – a personal "food lab" in every shopper's pocket.

Snacking and Mini-Meals

- Think smaller bites and more frequent eating patterns that reduce overall portion size and increase variety. Restaurants will add more small plates and appetizers to the menu while grocery stores and food companies will offer new snacks with appropriate pre-portioned options to take the guesswork out of portion sizes. According to The NPD Group, more than half of Americans snack two to three times per day, while one in five eating occasions is a snack.

Sustainability

- The National Resource Defense Council (www.nrdc.org) estimates 40% of food goes uneaten each month in the United States. The Eco Pulse Survey from the Shelton Group (www.sheltongrp.com) reports 39% of Americans feel the most "green guilt" for wasting food, almost double the number who feel guilty about not recycling.

The Boomer Reality of Diabetes, High Blood Pressure and Heart Disease

- Studies by The NPD Group show that nutrition and healthy eating habits are top meal-planning priorities for Baby Boomers. A recent study by ConAgra Foods found that eating canned tomatoes provides the greatest source of antioxidants to Americans' diets – more than any other non-starchy vegetable. People who tend to eat low-fat diets rich in fruits and vegetables tend to have a decreased risk of cancer and heart disease. Boomers will focus on their intake of antioxidants as they continue their search for the fountain of youth. Boomers will control more than half the dollars spent on grocery foods by 2015, look for more heart-healthy antioxidant-rich foods including oily fish such as salmon, as well as green tea, sweet potatoes, dark leafy greens, popcorn, berries, and whole grains to take over supermarket shelves.

The Impact of Millennials

- In 2013 supermarkets and food companies will cater more toward Millennial consumers with affordable foods that are flavorful and ethnically diverse. Millennials, those born between 1982 and 2001, will represent 19% of the population by 2020, and will have double their current buying power for food-at-home. Millennials also love food, and their passionate interest is led by their desire to understand where foods are from, preparation, and how food is served. A recent study by Jefferies Alix Partners (www.alixpartners.com) found that Millennials are also deal seekers and are much more focused on finding the lowest price over brand loyalty.

The Story Behind Our Food

- 2013 will be a transitional year as on-package claims proliferate and confuse. Look as supermarkets take on the role of gatekeeper and actually demand proof and transparency of claims before they will permit products to be sold on their shelves. The role of retail dietitians will increase as their influence and education become more important to everyday buying decisions. Consumers are reading labels and selecting their foods more holistically based on all the "food factors" including taste, ingredients, source and nutritional composition, as well as who is making their food along with an understanding of impact on the environment.

6.11 Technomic

Technomic foresees the following restaurant trends in 2013:

Chicken Surprise

- Yes, chicken is ubiquitous thanks to its always-reasonable price and remarkable versatility, but now it's actually trendy as well. New quick-service and fast-casual fried-chicken concepts are popping up, offering Southern or spicy takes on a classic. And now that Latin-accented marinated chicken has established a niche, African peri-peri chicken may be next.

Fast-Casual Goes Globe-Trotting

- Success in the exploding fast-casual sector is no longer limited to bakery cafes and Mexican concepts. Build-your-own-better-burger chains and gourmet brick-oven pizza restaurants have been on the rise for some time, but now we're also seeing more ethnic foods and flavors – from American barbecue to Southeast Asian soups, and from sandwiches to Mediterranean and Middle Eastern fare.

Great Grains

- Recognized as nutrition powerhouses – packed with protein as well as texture and full, rich taste – grains are also playing star roles on trendy menus. Dishes like polenta, couscous, or bulgur are central to some of today's hottest ethnic cuisines. And a number of grains – quinoa, amaranth, millet, wild rice, corn, oats, and buckwheat – do not contain gluten, so they're being nudged to the fore as part of the movement to gluten-free eating.

More Is More

- On the other hand, there's an opposite value-as-volume movement. Look for more deals like Pizza Hut's Big Dinner Box (two pizzas with multiple sides) or Olive Garden's Dinner Today & Dinner Tomorrow (a dine-in meal plus a to-go meal), as well as multi-course feasts for two, four or more – even whole-hog pig roasts.

Noodle-Shop Noodles

- Ramen done right is a long way from dorm fare; it's nutritious, subtle, satisfying, and redolent of exotic Far East street markets. Look for ramen, udon, soba, cellophane and rice noodles to show up in hearty layered bowls, fragrant soups and even mixed-texture salads, not only in a burgeoning number of big-city noodle shops but in seafood and varied-menu restaurants as well.

Restaurants Thirsty For Differentiation Turn To Beverages

- Trends include fresh fruit (especially tropical fruit) beverages; natural energy drinks; housemade sodas; cocktails made with candy-like flavored vodkas; microdistillery liquors that promote drinking locally; regional craft brews starring in beer-and-food pairings; and the rise of hard ciders.

Retro Rising: Diner And Deli Fare

- Concepts of many types are looking to the menus of traditional and contemporary diners and delis for inspiration. We'll see a proliferation of premium diner- and deli-inspired meaty sandwiches, full-flavored soups, even pickles – from traditional dill cukes to pickled red onion.

South America – The Next Frontier

- Just as diners who love Asian fare have explored beyond Chinese to develop a taste for Thai and Vietnamese, those who favor Mexican are now looking further south – all the way to Brazil, Argentina, and Peru. We'll see mainstreaming of South American-style grilled meats, chimichurri sauce, ceviche, South American-Asian fusion seafood dishes and iconic drinks, from Brazil's caipirinha to Peru's pisco sour.

Vegetables Take Their Star Turn

- As more diners discover the joys of occasional meatless meals, the flirtation with vegetarian fare evolves into flexitarian fascination with actual vegetables. That means not only innovative salads but also creative presentations of roasted or steamed veggies, even the assertive ones like carrots, kale or Brussels sprouts. Vegetables at the center of the plate are welcomed by diners – who continue to seek fresh, local, healthful fare – as well as operators squeezed by rising costs for proteins.

According to Technomic, the major developments influencing adult beverages in 2013 will include the following:

Beer Comes To The Table In High-End Restaurants

- Extensive beer lists developed with the same care as wine lists take hold at upscale-casual and fine-dining restaurants, where beer's food-friendly nature further enhances the dining experience.

Beer Gardens Indoors And Out

- The communal experience of the beer garden goes beyond the major markets. The hottest trends in beer, food, and socializing come to life in large open spaces – both indoors and outside – devoted to the casual enjoyment and exploration of beer and food as beer gardens show up in markets from New York to New Orleans and beyond.

Digital Drinks

- Wine, cocktail, and beer lists presented on digital tablets put descriptive information, photos, and even food-pairing suggestions at guests' fingertips in bars and restaurants, while in-store tablets and digital kiosks provide product details, ratings and serving suggestions at retail. Smartphone apps, along with QR codes on everything from packaging to menus, also immediately connect consumers to interesting drink information.

Mixers Matter

- The quality trend prompts bar pros to apply the same stringent standards to selecting and showcasing mixers, juice, flavorings, purees, bitters, and other drink ingredients as they do to the alcohol components.

New Drinks On Tap

- Innovative dispensing systems at bars and restaurants bring spirits and cocktails to the tap, sometimes even at patrons' tables. Keg wines also deliver unique vintages in a fresh format.

Next-Level Ciders

- Hard cider's growth continues, thanks to the broad appeal and food-friendly flavor profiles, not to mention increased distribution and marketing support as major supplier companies are now playing in the category. New flavored varieties further bolster the category in both retail and restaurant/bar outlets.

Next-Level Retailing

- Adult beverage retailing takes an upscale turn, moving from “package store” to “bottle shop” concepts that focus on eclectic spirits, wine, and beer offerings, hand selling of products and attention to the overall customer experience. In-store sipping and sampling proliferates, thanks to legislative changes, and growler filling stations find favor in convenience and grocery outlets.

Unexpected Flavors In Unexpected Places

- Confectionary flavors in vodka provide ongoing excitement, but flavors show up and take some categories in new directions. Canadian whisky appeals to younger adults with flavored expressions, while rum and tequila continue to deliver new flavor experiences. The duality of sweet-and-savory and other flavor combinations take flavored vodkas into new realms, as do unique and unexpected offerings that inspire at-home and professional bartenders alike.

Whiskey Wows

- From whiskey-flavored liquors to flavored whiskeys, and from single barrel bourbons to new takes on rye, whiskey’s appeal grows. In bars and restaurants, the storied brown spirit attracts more young adults and women, while consumers experiment with both traditional and new expressions for at-home enjoyment.

Wines Go Sweet

- The sweet wine trend continues, with varietals including Moscato showing up in table wines and in pink sparklers on menus across the country. Red blends also proliferate, delivering a range of flavor profiles, many of which skew toward the sweet and medium-bodied end of the spectrum to appeal particularly to Millennials.

6.12 The Food Channel

The Food Channel (www.foodchannel.com) in conjunction with CultureWaves® and the International Food Futurists® compiles an annual list of the top 10 food trends foreseen for the coming year. The 2013 Trends Forecast is as follows:

Brunch Becomes The New Fourth Meal

- The late-morning meal that usurps breakfast and lunch is becoming the hot new meal occasion. You can find eateries that feature karaoke during brunch or offer a free-flowing Bloody Mary Bar. There is even a bowling alley that hosts a brunch, serving such choices as fried chicken, buttermilk pancakes, and cinnamon toast pizza. So stay up late, then sleep in, and enjoy the new fourth meal.

Comfort Food With An Ethnic Accent

- Younger generations have expanded what fits into this nostalgic category, with an emphasis on ethnic cuisines. Comfort food for the twenty- and thirty-something crowd includes choices like Japanese ramen, Korean kimchi, Chinese pot stickers, sun cakes and Vietnamese pho. Look for new twists in 2013 like jumbo-sized "man sushi."

Cooking To A Tea

- Earl Grey and other tea flavors are starting to be used in cooking. The consumption of tea, in general, is growing and now it's moving beyond beverage onto the ingredient list for some menu items. Teas have great names and can help spice up a menu in many ways. Look for tea rubs, the way there are coffee and cocoa rubs. Tea … it's not just for drinking anymore.

Here's The Skinny

- We're finally starting to see the obesity trend level off a bit with a growing number of Americans striving to eat healthier. But a developing subset of the movement to eat smarter is a new desire to be – not just at a healthy weight – but actually skinny. The "skinny-fit" trend is moving from a blue jeans category to a way of eating, and some restaurants are responding with tiny portions that cater to this vanity-driven crowd. This is a trend to watch in 2013.

Home Bakers Hone Skills

- High-end specialty bakery products are becoming widely accessible for home use. It's never been easier to get professional restaurant quality ingredients and supplies. At-home bakers have found a new way to make what used to be hard ... well, if not easy, at least easier. Thanks to new parchments, new pans, new recipes, and tutorials, baking up fancy pastries at home is becoming a more realistic goal. Premium French pastries are getting incorporated into more desserts and into more breakfast/brunch items, and more people embracing the idea for home cooking. The French Pastry School of Kennedy-King College in Chicago is expanding for those thinking about going pro, as well as some who are simply serious about getting really good at it.

Illegal Dining

- Years ago we called out Clandestine Dining, where people were setting up pop-up restaurants that you had to be invited to in order to even know they existed. Then came along food trucks and people started to realize that restaurant food could show up in unexpected places. Now in 2013, it's "hush dining," fueled by Twitter and the spirit of entrepreneurship – but not legally licensed as a business. There are a lot of people out there with great ideas on how to change a meal, make it their own, and make it the way nobody else has – but they don't have the capital or the time to start a restaurant. So they're printing business cards and setting up a Twitter account, going to farmers markets and utilizing word of mouth to create an on-order kitchen out of their home. It's half thrill of the hunt and half genuinely homemade (with a little black market appeal thrown in the mix) that eggs on diners looking for the next food truck and the next dive – beyond social media. It's an evolution of both pop-up dining and of food trucks, and we think, while business licenses are there for a reason, it will be interesting to see how this evolves new ideas and new approaches to the difficult business of running a restaurant.

Seasonals For All Seasons

- Traditional seasons are getting stretched out, with people making things like pumpkin muffins in the summer. The health benefits and the flavor are turning the fall favorite into a year-round flavor in all kinds of dishes. Chefs have increased their use of pumpkin on menus by nearly 40% in the last two years. Tomatoes have been an all-year staple for years, but new breakthroughs in agri-science are making the off-season varieties actually worth eating. Then there's the continuation of the canning trend (which we spotlighted last year), that lets folks enjoy the bounty of summer all winter long.

Smokin' Hot

- Smoking – as in smoked foods and beverages – is big and getting bigger. At the dinner table, it's going way beyond barbecue, and the trend is spreading. We're starting to see things like smoked cocktails, smoked olive oil, and even smoked water. Nordic/Scandinavian cuisine is one to watch in the coming year, too, and you'll find a variety of smoked food choices driving that trend.

The Prix-Fixe Is In

- "No choice" is becoming the new choice when it comes to dining out. The European-style prix-fixe (fixed menu) is making its way to American shores. Fine-dining establishments offer a limited range of set choices, and are holding firm on no substitutions. It's trickling down to the casual-dining segment, too. Chains are bundling a selection of appetizer-entrèe-dessert three-course meals for two for a value price.

The Rise Of The Supermarket Concierge

- Grocery stores have executive chefs, offer cooking classes, and have specialists who can direct you to the best cheese, best meats, and best baked goods. We began to see it a few years ago when we predicted the rise in butchers, and it's gone beyond. Cooking classes are everywhere – sponsored by grocery stores, private caterers, and restaurants. The supermarket concierge is the next logical step in the progression.

6.13 Market Resources

Andrew Freeman & Co., 101 Townsend Street, Suite 303, San Francisco, CA 94107. (415) 781-5700. (www.afandco.com)

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

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

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

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

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

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

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

PART III: CITY-BY-CITY ANALYSIS

7

DINING OUT

7.1 Metropolitan Areas

According to International Demographics (www.themediaaudit.com), the following are the metropolitan areas with the highest percentage of adults who dined at full-service restaurants, on average, two or more times per week in 2012:

- Des Moines, IA: 18.7%
- Athens, GA: 18.3%
- West Palm Beach, FL: 18.2%
- Northwest Arkansas: 17.9%
- Dallas-Ft. Worth, TX: 17.2%
- Lexington, KY: 15.9%
- Atlanta, GA: 15.6%
- Greensboro, NC: 15.6%
- Miami-Ft. Lauderdale, FL: 15.2%
- Springfield, IL: 15.1%

The following metropolitan areas had the lowest percentage of adults dining at full-service restaurants two or more times per week in 2012:

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

Data on full-service dining in 93 metropolitan areas is available online at www.themediaaudit.com/press/local-releases.

7.2 Market Resources

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

8

QUICK-SERVICE RESTAURANT VISITS

8.1 Metropolitan Areas

According to International Demographics (www.themediaaudit.com), the following are the metropolitan areas with the highest average number of weekly quick-service restaurant purchases among residents of various metropolitan areas in 2012:

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

The following metropolitan areas had the lowest average number of weekly quick-service restaurant purchases in 2012:

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

Data on quick-service restaurant visits in 93 metropolitan areas is available online at www.themediaaudit.com/press/local-releases.

8.2 Market Resources

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

9

LARGEST CHAINS IN METROPOLITAN AREAS

9.1 Largest Chains and Unit Counts

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

Albuquerque, New Mexico

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

Anchorage, Alaska

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

Atlanta, Georgia

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

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

Austin, Texas

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

Baltimore, Maryland

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

Billings, Montana

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

Boston, Massachusetts

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

Charlotte, North Carolina

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

Charleston, South Carolina

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

Chicago, Illinois

- Subway: 777
- Stabucks: 484
- McDonald's: 466
- Dunkin' Donuts: 310
- Burger King: 221

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

Cleveland, Ohio

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

Columbus, Ohio

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

Concord, New Hampshire

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

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

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

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

Houston, Texas
- Subway: 378
- McDonald's: 289
- Starbucks: 255
- Jack In The Box: 203
- Sonic: 175
- Domino's Pizza: 121
- Taco Bell: 121

- Pizza Hut: 117
- Church's Chicken: 111
- Whataburger: 111

Honolulu, Hawaii
- Subway: 89
- Starbucks: 52
- McDonald's: 49
- L&L Hawaiian Barbecue: 33
- Jamba Juice: 25
- Jack In The Box: 21
- Burger King: 20
- Dunkin' Donuts/Baskin-Robbins (co-branded): 19
- Papa John's: 15
- The Coffee Bean & Tea Leaf: 14

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

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

Las Vegas, Nevada
- Starbucks: 156
- Subway: 138
- McDonald's: 105

- Jack in the Box: 57
- Panda Express: 57
- Taco Bell: 49
- Burger King: 43
- Pizza Hut: 42
- Quiznos: 41
- Port of Subs: 38

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

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

Louisville, Kentucky
- Subway: 111
- McDonald's: 72
- Dairy Queen: 43
- Taco Bell: 39
- Arby's: 38
- KFC: 37
- Wendy's: 36
- Starbucks: 35
- Dominos: 34
- Papa John's Pizza: 34

Madison, Wisconsin

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

Miami, Florida

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

Milwaukee, Wisconsin

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

Minneapolis, Minnesota

• Subway:	265
• Caribou Coffee:	184
• McDonald's:	133
• Dairy Queen:	116
• Starbucks:	108
• Domino's Pizza:	78
• Burger King:	75

- Taco Bell: 64
- Arby's: 57
- Jimmy John's: 56

Mobile, Alabama

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

Montgomery, Alabama

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

Nashville, Tennessee

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

New Orleans, Louisiana

- Subway: 120
- McDonald's: 71
- Smoothie King: 42

- Burger King: 41
- Wendy's: 41
- Popeyes: 35
- Domino's Pizza: 32
- PJ's Coffee & Wine Bar: 28
- Quiznos: 28
- Pizza Hut: 27

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

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

Orlando, Florida
- Subway: 129
- McDonald's: 109
- Starbucks: 89
- Burger King: 67
- Wendy's: 60
- Pizza Hut: 57
- Taco Bell: 53
- KFC: 42
- Domino's Pizza: 37
- Blimpie: 35

Philadelphia, Pennsylvania

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

Phoenix, Arizona

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

Pittsburgh, Pennsylvania

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

Portland, Maine

- Dunkin' Donuts: 60
- Subway: 38
- McDonald's: 21
- Starbucks: 19
- Dairy Queen: 12
- Burger King: 11

- Domino’s Pizza: 11
- Wendy’s: 11
- KFC: 7
- Pizza Hut: 7

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

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

Raleigh, North Carolina
- Subway: 88
- McDonald’s: 58
- Starbucks: 43
- Wendy’s: 37
- Burger King: 31
- Bojangles: 26
- Domino’s Pizza: 26
- Quiznos: 25
- Chick-Fil-A: 24
- KFC: 24

Richmond, Virginia

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

Sacramento, California

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

Salem, Oregon

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

San Diego, California

- Starbucks: 240
- Subway: 196
- McDonald's: 118
- Jack In The Box: 94
- Taco Bell: 58

• KFC:	52
• Panda Express:	52
• Burger King:	48
• Pizza Hut:	47
• Wendy's:	35

San Francisco, California

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

Seattle, Washington

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

St. Louis, Missouri

• Subway:	187
• McDonald's:	138
• Taco Bell:	92
• Domino's Pizza:	81
• Dairy Queen:	73
• Pizza Hut:	71
• Jack in the Box:	68
• Starbucks Coffee:	66
• Hardee's:	54
• Quiznos:	54

Tampa, Florida

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

Trenton, New Jersey

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

8.2 Market Resources

Chain Store Guide, 3922 Coconut Palm Drive, Tampa, FL 33619. (800) 927-9292. (www.instant-demographics.com)

10

RESTAURANT SALES

10.1 Overview

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

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

Combined, there are 942 MSAs and µSAs.

10.2 Restaurant Sales, Unit Counts, and Sales Per Unit

Total restaurant sales, unit counts, and average sales per unit for each for each MSA and µSA are as follows (source: *Restaurant Business* [February 2013]):

	Total Restaurant Sales	Units	Sales per Unit
• Abbeville, LA:	$ 33,635,277	88	$ 382,219
• Aberdeen, WA:	$ 87,803,463	182	$ 482,437
• Aberdeen, SD:	$ 50,100,111	95	$ 527,370
• Abilene, TX:	$ 271,514,258	313	$ 867,458
• Ada, OK:	$ 24,556,919	52	$ 472,248
• Adrian, MI:	$ 113,157,265	144	$ 785,814
• Akron, OH:	$ 1,079,985,735	1,436	$ 752,079
• Alamogordo, NM:	$ 63,142,788	89	$ 709,470
• Albany, GA:	$ 211,018,536	285	$ 740,416
• Albany-Lebanon, OR:	$ 126,628,348	225	$ 562,793
• Albany-Schenectady-Troy, NY:	$ 1,231,312,545	2,052	$ 600,055
• Albemarle, NC:	$ 48,759,045	114	$ 427,711
• Albert Lea, MN:	$ 28,539,909	54	$ 528,517
• Albertville, AL:	$ 138,532,158	174	$ 796,162
• Albuquerque, NM:	$ 1,478,414,141	1,645	$ 898,732
• Alexander City, AL:	$ 29,268,365	67	$ 436,841
• Alexandria, LA:	$ 174,015,132	265	$ 656,661
• Alexandria, MN:	$ 42,253,299	74	$ 570,991
• Alice, TX:	$ 53,791,950	80	$ 672,399
• Allegan, MI:	$ 103,198,952	188	$ 548,931

•	Allentown-Bethlehem, PA-NJ:	$ 1,037,299,678	1,597	$ 649,530
•	Alma, MI:	$ 48,704,005	70	$ 695,772
•	Alpena, MI:	$ 21,168,760	68	$ 311,305
•	Altoona, PA:	$ 170,956,754	298	$ 573,680
•	Altus, OK:	$ 29,405,533	62	$ 474,283
•	Amarillo, TX:	$ 381,344,881	588	$ 648,546
•	Americus, GA:	$ 39,811,046	62	$ 642,114
•	Ames, IA:	$ 113,280,168	180	$ 629,334
•	Amsterdam, NY:	$ 48,246,403	89	$ 542,094
•	Anchorage, AK:	$ 808,977,607	913	$ 886,065
•	Anderson, IN:	$ 171,014,054	221	$ 773,819
•	Anderson, SC:	$ 181,695,896	373	$ 487,120
•	Andrews, TX:	$ 17,977,817	31	$ 579,930
•	Angola, IN:	$ 38,992,081	86	$ 453,396
•	Ann Arbor, MI:	$ 527,935,550	754	$ 700,180
•	Anniston-Oxford, AL:	$ 153,063,158	220	$ 695,742
•	Appleton, WI:	$ 364,612,100	565	$ 645,331
•	Arcadia, FL:	$ 10,766,093	44	$ 244,684
•	Ardmore, OK:	$ 59,018,663	113	$ 522,289
•	Arkadelphia, AR:	$ 28,304,635	44	$ 643,287
•	Asheville, NC:	$ 681,050,111	963	$ 707,217
•	Ashland, OH:	$ 38,649,355	98	$ 394,381
•	Ashtabula, OH:	$ 89,268,779	241	$ 370,410
•	Astoria, OR:	$ 93,632,201	146	$ 641,316
•	Atchison, KS:	$ 9,629,762	31	$ 310,637
•	Athens, OH:	$ 64,421,783	149	$ 432,361
•	Athens, TN:	$ 64,895,065	87	$ 745,920
•	Athens, TX:	$ 62,016,667	107	$ 579,595
•	Athens-Clarke County, GA:	$ 282,049,205	423	$ 666,783
•	Atlanta-Sandy Springs, GA:	$ 9,675,189,581	10,821	$ 894,112
•	Atlantic City-Hammonton, NJ:	$ 714,753,790	807	$ 885,692
•	Auburn, IN:	$ 56,986,683	82	$ 694,960
•	Auburn, NY:	$ 76,973,651	158	$ 487,175
•	Auburn-Opelika, AL:	$ 179,274,674	287	$ 624,650
•	Augusta-Richmond County, GA-SC:	$ 767,610,203	1,096	$ 700,374
•	Augusta-Waterville, ME:	$ 149,632,938	245	$ 610,747
•	Austin, MN:	$ 38,050,311	55	$ 691,824
•	Austin-Round Rock-San Marcos, TX:	$ 2,970,325,808	3,731	$ 796,121
•	Bainbridge, GA:	$ 21,419,589	28	$ 764,985
•	Bakersfield-Delano, CA:	$ 1,024,420,811	1,395	$ 734,352
•	Baltimore-Towson, MD:	$ 5,014,770,505	5,760	$ 870,620
•	Bangor, ME:	$ 199,661,600	292	$ 683,773
•	Baraboo, WI:	$ 159,827,364	191	$ 836,792
•	Barnstable Town, MA:	$ 682,550,497	799	$ 854,256

• Barre, VT:	$ 74,141,274	138	$ 537,256
• Bartlesville, OK:	$ 71,023,550	85	$ 835,571
• Bastrop, LA:	$ 21,805,837	22	$ 991,174
• Batavia, NY:	$ 58,972,248	122	$ 483,379
• Batesville, AR:	$ 36,249,952	43	$ 843,022
• Baton Rouge, LA:	$ 1,009,900,222	1,657	$ 609,475
• Battle Creek, MI:	$ 143,718,674	266	$ 540,296
• Bay City, MI:	$ 193,454,203	236	$ 819,721
• Bay City, TX:	$ 37,893,972	85	$ 445,811
• Beatrice, NE:	$ 23,281,702	48	$ 485,035
• Beaumont-Port Arthur, TX:	$ 491,083,865	688	$ 713,785
• Beaver Dam, WI:	$ 54,070,210	152	$ 355,725
• Beckley, WV:	$ 120,799,059	174	$ 694,247
• Bedford, IN:	$ 45,418,734	68	$ 667,923
• Beeville, TX:	$ 24,667,724	35	$ 704,792
• Bellefontaine, OH:	$ 46,478,157	101	$ 460,180
• Bellingham, WA:	$ 288,959,129	440	$ 656,725
• Bemidji, MN:	$ 47,347,616	82	$ 577,410
• Bend, OR:	$ 288,220,199	425	$ 678,165
• Bennettsville, SC:	$ 9,660,852	39	$ 247,714
• Bennington, VT:	$ 55,454,867	106	$ 523,159
• Berlin, NH-VT:	$ 54,267,638	85	$ 638,443
• Big Rapids, MI:	$ 42,413,896	78	$ 543,768
• Big Spring, TX:	$ 34,282,774	75	$ 457,104
• Billings, MT:	$ 279,169,185	368	$ 758,612
• Binghamton, NY:	$ 336,061,751	580	$ 579,417
• Birmingham-Hoover, AL:	$ 1,610,439,915	2,084	$ 772,764
• Bishop, CA:	$ 45,016,987	65	$ 692,569
• Bismarck, ND:	$ 146,564,960	205	$ 714,951
• Blackfoot, ID:	$ 20,809,582	51	$ 408,031
• Blacksburg, VA:	$ 242,846,314	314	$ 773,396
• Bloomington, IN:	$ 296,108,929	383	$ 773,130
• Bloomington-Normal, IL:	$ 280,370,758	355	$ 789,777
• Bloomsburg-Berwick, PA:	$ 125,793,477	161	$ 781,326
• Bluefield, WV-VA:	$ 137,502,501	202	$ 680,705
• Blytheville, AR:	$ 40,209,431	78	$ 515,506
• Bogalusa, LA:	$ 26,320,001	65	$ 404,923
• Boise City-Nampa, ID:	$ 856,207,570	1,229	$ 696,670
• Bonham, TX:	$ 20,026,946	48	$ 417,228
• Boone, IA:	$ 13,069,338	41	$ 318,764
• Boone, NC:	$ 109,377,384	156	$ 701,137
• Borger, TX:	$ 26,982,671	49	$ 550,667
• Boston-Cambridge-Quincy, MA-NH:	$ 9,761,499,917	10,925	$ 893,501
• Boulder, CO:	$ 608,151,818	725	$ 838,830

• Bowling Green, KY:	$ 211,593,915	257	$ 823,323
• Bozeman, MT:	$ 186,412,253	274	$ 680,337
• Bradford, PA:	$ 32,933,219	99	$ 332,659
• Brainerd, MN:	$ 140,552,828	228	$ 616,460
• Branson, MO:	$ 159,588,684	297	$ 537,336
• Bremerton-Silverdale, WA:	$ 286,463,535	496	$ 577,547
• Brenham, TX:	$ 44,624,115	83	$ 537,640
• Brevard, NC:	$ 27,918,312	71	$ 393,216
• Bridgeport-Stamford-Norwalk, CT:	$ 1,474,287,722	2,253	$ 654,366
• Brigham City, UT:	$ 21,273,420	54	$ 393,952
• Brookhaven, MS:	$ 40,872,839	55	$ 743,143
• Brookings, OR:	$ 38,073,964	75	$ 507,653
• Brookings, SD:	$ 45,164,516	88	$ 513,233
• Brownsville, TN:	$ 8,548,373	33	$ 259,042
• Brownsville-Harlingen, TX:	$ 388,758,491	713	$ 545,243
• Brownwood, TX:	$ 36,770,193	64	$ 574,534
• Brunswick, GA:	$ 253,217,407	308	$ 822,134
• Bucyrus, OH:	$ 39,946,419	73	$ 547,211
• Buffalo-Niagara Falls, NY:	$ 1,735,577,369	2,542	$ 682,761
• Burley, ID:	$ 26,422,961	93	$ 284,118
• Burlington, IA-IL:	$ 56,299,033	109	$ 516,505
• Burlington, NC:	$ 277,389,289	319	$ 869,559
• Burlington-South Burlington, VT:	$ 335,860,209	464	$ 723,837
• Butte-Silver Bow, MT:	$ 48,304,203	119	$ 405,918
• Cadillac, MI:	$ 53,673,089	101	$ 531,417
• Calhoun, GA:	$ 65,044,995	69	$ 942,681
• Cambridge, OH:	$ 54,421,320	72	$ 755,852
• Cambridge, MD:	$ 29,749,561	66	$ 450,751
• Camden, AR:	$ 13,998,931	42	$ 333,308
• Campbellsville, KY:	$ 29,569,347	35	$ 844,838
• Canon City, CO:	$ 34,820,970	60	$ 580,350
• Canton, IL:	$ 24,014,930	77	$ 311,882
• Canton-Massillon, OH:	$ 606,649,728	846	$ 717,080
• Cape Coral-Fort Myers, FL:	$ 1,308,648,837	1,444	$ 906,267
• Cape Girardeau-Jackson, MO-IL:	$ 212,688,083	192	$1,107,750
• Carbondale, IL:	$ 81,361,651	140	$ 581,155
• Carlsbad-Artesia, NM:	$ 54,091,183	95	$ 569,381
• Carson City, NV:	$ 94,693,246	143	$ 662,191
• Casper, WY:	$ 133,539,630	174	$ 767,469
• Cedar City, UT:	$ 47,739,413	81	$ 589,375
• Cedar Rapids, IA:	$ 317,305,267	539	$ 588,693
• Cedartown, GA:	$ 26,048,359	64	$ 407,006
• Celina, OH:	$ 42,519,274	89	$ 477,745
• Central City, KY:	$ 32,108,069	55	$ 583,783

• Centralia, IL:	$ 31,958,949	60	$ 532,649
• Centralia, WA:	$ 78,061,646	166	$ 470,251
• Chambersburg, PA:	$ 145,501,201	247	$ 589,074
• Champaign-Urbana, IL:	$ 298,771,814	541	$ 552,258
• Charleston, SC:	$ 1,364,844,032	1,596	$ 855,165
• Charleston, WV:	$ 382,246,606	645	$ 592,630
• Charleston-Mattoon, IL:	$ 76,209,722	144	$ 529,234
• Charlotte-Gastonia, NC-SC:	$ 3,141,593,615	3,686	$ 852,304
• Charlottesville, VA:	$ 441,635,039	495	$ 892,192
• Chattanooga, TN-GA:	$ 927,222,269	1,185	$ 782,466
• Chester, SC:	$ 18,702,814	49	$ 381,690
• Cheyenne, WY:	$ 169,487,763	165	$1,027,199
• Chicago, IL-IN-WI:	$ 306,387,642	471	$ 650,505
• Chillicothe, OH:	$ 95,064,083	129	$ 736,931
• Cincinnati-Middletown, OH-KY-IN:	$17,907,377,409	21,188	$ 845,166
• Chico, CA:	$ 3,516,748,846	4,295	$ 818,801
• Claremont, NH:	$ 20,141,159	71	$ 283,678
• Clarksburg, WV:	$ 125,745,439	173	$ 726,852
• Clarksdale, MS:	$ 14,674,421	35	$ 419,269
• Clarksville, TN-KY:	$ 337,401,547	513	$ 657,703
• Clearlake, CA:	$ 37,788,261	138	$ 273,828
• Cleveland, MS:	$ 43,463,054	58	$ 749,363
• Cleveland, TN:	$ 130,337,253	191	$ 682,394
• Cleveland-Elyria-Mentor, OH:	$ 3,360,337,651	4,736	$ 709,531
• Clewiston, FL:	$ 30,994,998	61	$ 508,115
• Clinton, IA:	$ 44,869,407	98	$ 457,851
• Clovis, NM:	$ 56,410,467	78	$ 723,211
• Coeur d'Alene, ID:	$ 180,907,014	340	$ 532,079
• Coffeyville, KS:	$ 31,140,540	60	$ 519,009
• Coldwater, MI:	$ 73,047,302	74	$ 987,126
• College Station-Bryan, TX:	$ 338,322,208	492	$ 687,647
• Colorado Springs, CO:	$ 962,797,779	1,234	$ 780,225
• Columbia, MO:	$ 251,934,518	386	$ 652,680
• Columbia, SC:	$ 1,029,855,970	1,485	$ 693,506
• Columbia, TN:	$ 119,374,834	160	$ 746,093
• Columbus, GA-AL:	$ 550,252,189	639	$ 861,115
• Columbus, IN:	$ 103,832,485	129	$ 804,903
• Columbus, MS:	$ 102,011,979	118	$ 864,508
• Columbus, NE:	$ 36,157,469	54	$ 669,583
• Columbus, OH:	$ 3,559,194,109	4,107	$ 866,617
• Concord, NH:	$ 200,199,715	284	$ 704,929
• Connersville, IN:	$ 27,709,017	44	$ 629,750
• Cookeville, TN:	$ 164,871,384	216	$ 763,293
• Coos Bay, OR:	$ 77,463,754	156	$ 496,563

• Corbin, KY:	$ 92,923,967	48	$1,935,916
• Cordele, GA:	$ 37,168,443	50	$ 743,369
• Corinth, MS:	$ 40,103,072	80	$ 501,288
• Cornelia, GA:	$ 53,714,866	89	$ 603,538
• Corning, NY:	$ 90,259,252	153	$ 589,930
• Corpus Christi, TX:	$ 688,108,113	957	$ 719,026
• Corsicana, TX:	$ 41,091,965	81	$ 507,308
• Cortland, NY:	$ 62,769,906	114	$ 550,613
• Corvallis, OR:	$ 112,088,398	166	$ 675,231
• Coshocton, OH:	$ 20,670,602	56	$ 369,118
• Crawfordsville, IN:	$ 41,201,797	67	$ 614,952
• Crescent City, CA:	$ 24,882,936	48	$ 518,395
• Crestview, FL:	$ 595,957,970	556	$1,071,867
• Crossville, TN:	$ 46,447,705	108	$ 430,071
• Crowley, LA:	$ 37,874,636	97	$ 390,460
• Cullman, AL:	$ 86,081,909	92	$ 935,673
• Culpeper, VA:	$ 52,022,961	62	$ 839,080
• Cumberland, MD-WV:	$ 99,626,469	187	$ 532,762
• Dallas-Fort Worth-Arlington, TX:	$11,330,329,692	13,356	$ 848,333
• Dalton, GA:	$ 139,213,508	249	$ 559,090
• Danville, IL:	$ 73,375,083	133	$ 551,692
• Danville, KY:	$ 78,814,608	81	$ 973,020
• Danville, VA:	$ 108,730,976	169	$ 643,379
• Daphne-Fairhope-Foley, AL:	$ 262,764,929	447	$ 587,841
• Davenport-Moline, IA-IL:	$ 576,285,779	964	$ 597,807
• Dayton, OH:	$ 1,494,604,333	1,703	$ 877,630
• Decatur, AL:	$ 142,672,747	247	$ 577,622
• Decatur, IL:	$ 165,724,107	232	$ 714,328
• Decatur, IN:	$ 24,865,908	48	$ 518,040
• Defiance, OH:	$ 51,297,626	67	$ 765,636
• Del Rio, TX:	$ 63,003,301	87	$ 724,176
• Deltona-Daytona Beach, FL:	$ 967,394,252	1,088	$ 889,149
• Deming, NM:	$ 32,101,392	44	$ 729,577
• Denver-Aurora-Broomfield, CO:	$ 4,713,897,435	5,451	$ 864,777
• DeRidder, LA:	$ 17,805,631	38	$ 468,569
• Des Moines-West Des Moines, IA:	$ 799,171,768	1,263	$ 632,757
• Detroit-Warren-Livonia, MI:	$ 6,401,204,318	8,750	$ 731,566
• Dickinson, ND:	$ 42,050,850	82	$ 512,815
• Dillon, SC:	$ 23,944,359	54	$ 443,414
• Dixon, IL:	$ 35,290,398	96	$ 367,608
• Dodge City, KS:	$ 34,885,885	50	$ 697,718
• Dothan, AL:	$ 191,722,471	356	$ 538,546
• Douglas, GA:	$ 79,224,893	75	$1,056,332
• Dover, DE:	$ 128,208,425	316	$ 405,723

• Dublin, GA:	$ 62,988,704	110	$ 572,625
• DuBois, PA:	$ 79,993,214	183	$ 437,121
• Dubuque, IA:	$ 134,082,678	253	$ 529,971
• Duluth, MN-WI:	$ 395,067,987	672	$ 587,899
• Dumas, TX:	$ 15,203,358	46	$ 330,508
• Duncan, OK:	$ 50,511,963	84	$ 601,333
• Dunn, NC:	$ 69,298,504	144	$ 481,240
• Durango, CO:	$ 97,696,042	193	$ 506,197
• Durant, OK:	$ 32,537,344	91	$ 357,553
• Durham-Chapel Hill, NC:	$ 885,845,113	1,010	$ 877,074
• Dyersburg, TN:	$ 42,559,044	73	$ 583,001
• Eagle Pass, TX:	$ 32,237,064	66	$ 488,440
• East Liverpool-Salem, OH:	$ 75,583,065	181	$ 417,586
• East Stroudsburg, PA:	$ 210,583,106	375	$ 561,555
• Easton, MD:	$ 96,487,735	118	$ 817,693
• Eau Claire, WI:	$ 203,118,607	421	$ 482,467
• Edwards, CO:	$ 255,475,943	277	$ 922,296
• Effingham, IL:	$ 81,922,680	91	$ 900,249
• El Campo, TX:	$ 40,232,606	100	$ 402,326
• El Centro, CA:	$ 169,620,696	242	$ 700,912
• El Dorado, AR:	$ 36,583,799	57	$ 641,821
• El Paso, TX:	$ 1,021,043,450	1,443	$ 707,584
• Elizabeth City, NC:	$ 88,818,244	114	$ 779,107
• Elizabethtown, KY:	$ 181,104,582	203	$ 892,141
• Elk City, OK:	$ 24,826,770	61	$ 406,996
• Elkhart-Goshen, IN:	$ 243,905,859	351	$ 694,888
• Elko, NV:	$ 49,463,317	126	$ 392,566
• Ellensburg, WA:	$ 65,189,973	139	$ 468,993
• Elmira, NY:	$ 124,958,645	145	$ 861,784
• Emporia, KS:	$ 32,082,326	83	$ 386,534
• Enid, OK:	$ 72,644,627	135	$ 538,108
• Enterprise-Ozark, AL:	$ 82,476,368	189	$ 436,383
• Erie, PA:	$ 398,536,183	607	$ 656,567
• Escanaba, MI:	$ 59,469,171	67	$ 887,600
• Espanola, NM:	$ 51,220,892	57	$ 898,612
• Eufaula, AL-GA:	$ 21,219,152	52	$ 408,061
• Eugene-Springfield, OR:	$ 549,989,264	871	$ 631,446
• Eureka-Arcata-Fortuna, CA:	$ 168,731,386	333	$ 506,701
• Evanston, WY:	$ 14,814,851	56	$ 264,551
• Evansville, IN-KY:	$ 497,411,120	734	$ 677,672
• Fairbanks, AK:	$ 155,772,664	245	$ 635,807
• Fairmont, MN:	$ 25,113,621	42	$ 597,943
• Fairmont, WV:	$ 53,959,488	133	$ 405,710
• Fallon, NV:	$ 31,079,013	51	$ 609,392

•	Fargo, ND-MN:	$ 277,064,508	448	$ 618,448
•	Faribault-Northfield, MN:	$ 77,669,587	101	$ 769,006
•	Farmington, MO:	$ 76,698,616	108	$ 710,172
•	Farmington, NM:	$ 135,142,388	202	$ 669,022
•	Fayetteville, AR-MO:	$ 588,713,305	887	$ 663,713
•	Fayetteville, NC:	$ 462,367,344	677	$ 682,965
•	Fergus Falls, MN:	$ 44,602,657	103	$ 433,036
•	Fernley, NV:	$ 27,253,184	79	$ 344,977
•	Findlay, OH:	$ 144,684,361	176	$ 822,070
•	Fitzgerald, GA:	$ 13,049,005	39	$ 334,590
•	Flagstaff, AZ:	$ 323,602,829	348	$ 929,893
•	Flint, MI:	$ 519,166,076	808	$ 642,532
•	Florence, SC:	$ 232,037,315	365	$ 635,719
•	Florence-Muscle Shoals, AL:	$ 169,286,168	277	$ 611,141
•	Fond du Lac, WI:	$ 115,455,222	196	$ 589,057
•	Forest City, NC:	$ 84,951,862	102	$ 832,861
•	Forrest City, AR:	$ 20,770,424	30	$ 692,347
•	Fort Collins-Loveland, CO:	$ 520,034,456	684	$ 760,284
•	Fort Dodge, IA:	$ 49,545,588	57	$ 869,221
•	Fort Leonard Wood, MO:	$ 73,739,469	99	$ 744,843
•	Fort Madison-Keokuk, IA-MO:	$ 40,343,580	100	$ 403,436
•	Fort Morgan, CO:	$ 25,476,698	48	$ 530,765
•	Fort Payne, AL:	$ 66,191,064	93	$ 711,732
•	Fort Polk South, LA:	$ 42,341,734	82	$ 516,363
•	Fort Smith, AR-OK:	$ 300,554,281	544	$ 552,489
•	Fort Valley, GA:	$ 39,537,809	45	$ 878,618
•	Fort Wayne, IN:	$ 581,396,988	811	$ 716,889
•	Frankfort, IN:	$ 36,571,818	50	$ 731,436
•	Frankfort, KY:	$ 88,616,682	142	$ 624,061
•	Fredericksburg, TX:	$ 35,331,877	58	$ 609,170
•	Freeport, IL:	$ 64,487,245	107	$ 602,685
•	Fremont, OH:	$ 100,405,968	124	$ 809,726
•	Fremont, NE:	$ 49,348,512	91	$ 542,291
•	Fresno, CA:	$ 998,654,540	1,637	$ 610,052
•	Gadsden, AL:	$ 117,821,710	159	$ 741,017
•	Gaffney, SC:	$ 45,869,783	86	$ 533,370
•	Gainesville, FL:	$ 383,629,042	572	$ 670,680
•	Gainesville, GA:	$ 194,840,957	313	$ 622,495
•	Gainesville, TX:	$ 48,918,862	66	$ 741,195
•	Galesburg, IL:	$ 76,401,093	161	$ 474,541
•	Gallup, NM:	$ 117,733,258	105	$1,121,269
•	Garden City, KS:	$ 69,769,305	63	$1,107,449
•	Gardnerville Ranchos, NV:	$ 84,442,385	118	$ 715,613
•	Georgetown, SC:	$ 127,067,292	179	$ 709,873

• Gettysburg, PA:	$ 108,420,560	185	$ 586,057
• Gillette, WY:	$ 56,204,372	81	$ 693,881
• Glasgow, KY:	$ 61,873,287	110	$ 562,484
• Glens Falls, NY:	$ 150,789,112	405	$ 372,319
• Gloversville, NY:	$ 34,599,213	140	$ 247,137
• Goldsboro, NC:	$ 135,207,675	174	$ 777,056
• Granbury, TX:	$ 61,628,289	119	$ 517,885
• Grand Forks, ND-MN:	$ 151,103,635	211	$ 716,131
• Grand Island, NE:	$ 84,896,166	182	$ 466,462
• Grand Junction, CO:	$ 214,734,984	281	$ 764,181
• Grand Rapids-Wyoming, MI:	$ 954,332,451	1,489	$ 640,922
• Grants, NM:	$ 31,021,023	37	$ 838,406
• Grants Pass, OR:	$ 110,217,460	193	$ 571,075
• Great Bend, KS:	$ 29,380,725	57	$ 515,451
• Great Falls, MT:	$ 136,091,250	209	$ 651,154
• Greeley, CO:	$ 249,161,123	405	$ 615,213
• Green Bay, WI:	$ 403,405,093	774	$ 521,195
• Greeneville, TN:	$ 68,575,391	113	$ 606,862
• Greensboro-High Point, NC:	$ 1,124,439,378	1,452	$ 774,407
• Greensburg, IN:	$ 33,774,224	59	$ 572,444
• Greenville, MS:	$ 50,261,413	92	$ 546,320
• Greenville, NC:	$ 247,850,975	339	$ 731,124
• Greenville, OH:	$ 38,004,348	87	$ 436,832
• Greenville-Mauldin-Easley, SC:	$ 967,879,408	1,391	$ 695,816
• Greenwood, MS:	$ 35,411,169	67	$ 528,525
• Greenwood, SC:	$ 94,361,888	117	$ 806,512
• Grenada, MS:	$ 29,632,340	47	$ 630,475
• Gulfport-Biloxi, MS:	$ 281,589,922	534	$ 527,322
• Guymon, OK:	$ 19,433,268	44	$ 441,665
• Hagerstown-Martinsburg, MD-WV:	$ 345,716,492	538	$ 642,596
• Hammond, LA:	$ 151,944,549	268	$ 566,957
• Hanford-Corcoran, CA:	$ 112,643,615	207	$ 544,172
• Hannibal, MO:	$ 32,901,289	88	$ 373,878
• Harriman, TN:	$ 33,090,789	47	$ 704,059
• Harrisburg, IL:	$ 21,541,813	55	$ 391,669
• Harrisburg-Carlisle, PA:	$ 808,212,616	1,169	$ 691,371
• Harrison, AR:	$ 39,260,132	78	$ 503,335
• Harrisonburg, VA:	$ 180,665,053	232	$ 778,729
• Hartford-West Hartford, CT:	$ 2,032,813,884	2,672	$ 760,784
• Hastings, NE:	$ 44,428,934	82	$ 541,816
• Hattiesburg, MS:	$ 267,223,572	318	$ 840,326
• Havre, MT:	$ 19,245,699	49	$ 392,769
• Hays, KS:	$ 62,533,234	81	$ 772,015
• Heber, UT:	$ 17,625,437	42	$ 419,653

• Helena, MT:	$ 97,981,482	178	$ 550,458
• Helena-West Helena, AR:	$ 10,205,462	25	$ 408,218
• Henderson, NC:	$ 67,551,779	74	$ 912,862
• Hereford, TX:	$ 17,337,574	38	$ 456,252
• Hickory-Lenoir-Morganton, NC:	$ 427,146,453	581	$ 735,192
• Hilo, HI:	$ 310,929,480	487	$ 638,459
• Hilton Head Island-Beaufort, SC:	$ 419,841,429	519	$ 808,943
• Hinesville-Fort Stewart, GA:	$ 88,441,561	126	$ 701,917
• Hobbs, NM:	$ 78,924,180	130	$ 607,109
• Holland-Grand Haven, MI:	$ 276,176,129	375	$ 736,470
• Homosassa Springs, FL:	$ 140,338,740	199	$ 705,220
• Honolulu, HI:	$ 2,301,953,866	2,375	$ 969,244
• Hood River, OR:	$ 40,328,634	68	$ 593,068
• Hope, AR:	$ 19,563,970	31	$ 631,096
• Hot Springs, AR:	$ 144,858,966	264	$ 548,708
• Houghton, MI:	$ 37,262,411	93	$ 400,671
• Houma-Bayou Cane-Thibodaux, LA:	$ 256,914,953	467	$ 550,139
• Houston-Sugar Land-Baytown, TX:	$ 8,596,031,036	11,980	$ 717,532
• Hudson, NY:	$ 65,057,236	130	$ 500,440
• Humboldt, TN:	$ 43,566,582	93	$ 468,458
• Huntingdon, PA:	$ 20,102,306	68	$ 295,622
• Huntington, IN:	$ 42,735,961	76	$ 562,315
• Huntington-Ashland, WV-KY-OH:	$ 332,008,528	463	$ 717,081
• Huntsville, AL:	$ 662,641,438	819	$ 809,086
• Huntsville, TX:	$ 46,077,747	109	$ 422,732
• Huron, SD:	$ 11,011,258	39	$ 282,340
• Hutchinson, KS:	$ 80,092,966	115	$ 696,461
• Hutchinson, MN:	$ 32,635,693	65	$ 502,088
• Idaho Falls, ID:	$ 158,508,037	238	$ 666,000
• Indiana, PA:	$ 125,027,772	130	$ 961,752
• Indianapolis-Carmel, IN:	$ 3,167,372,194	3,521	$ 899,566
• Indianola, MS:	$ 4,992,151	36	$ 138,671
• Iowa City, IA:	$ 222,084,078	350	$ 634,526
• Iron Mountain, MI-WI:	$ 40,372,751	72	$ 560,733
• Ithaca, NY:	$ 192,969,097	248	$ 778,101
• Jackson, MI:	$ 172,575,161	290	$ 595,087
• Jackson, MS:	$ 948,781,183	1,063	$ 892,551
• Jackson, TN:	$ 278,940,208	278	$1,003,382
• Jackson, WY-ID:	$ 93,193,896	110	$ 847,217
• Jacksonville, FL:	$ 2,471,545,348	3,068	$ 805,588
• Jacksonville, IL:	$ 58,640,517	88	$ 666,370
• Jacksonville, NC:	$ 232,942,085	227	$1,026,177
• Jacksonville, TX:	$ 32,861,675	71	$ 462,840
• Jamestown, ND:	$ 19,362,516	46	$ 420,924

• Jamestown-Dunkirk-Fredonia, NY:	$ 134,328,559	304	$ 441,870
• Janesville, WI:	$ 215,639,400	324	$ 665,554
• Jasper, IN:	$ 64,099,262	129	$ 496,894
• Jefferson City, MO:	$ 192,565,173	273	$ 705,367
• Jennings, LA:	$ 31,902,736	47	$ 678,782
• Jesup, GA:	$ 43,722,174	50	$ 874,443
• Johnson City, TN:	$ 250,003,567	394	$ 634,527
• Johnstown, PA:	$ 142,493,170	344	$ 414,224
• Jonesboro, AR:	$ 147,438,865	228	$ 646,662
• Joplin, MO:	$ 216,318,319	377	$ 573,789
• Juneau, AK:	$ 43,507,892	86	$ 505,906
• Kahului-Wailuku, HI:	$ 530,098,271	507	$1,045,559
• Kalamazoo-Portage, MI:	$ 534,208,766	666	$ 802,115
• Kalispell, MT:	$ 173,870,390	272	$ 639,229
• Kankakee-Bradley, IL:	$ 146,621,518	277	$ 529,320
• Kansas City, MO-KS:	$ 2,898,519,211	3,793	$ 764,176
• Kapaa, HI:	$ 180,462,511	176	$1,025,355
• Kearney, NE:	$ 66,982,598	117	$ 572,501
• Keene, NH:	$ 111,494,743	154	$ 723,992
• Kendallville, IN:	$ 29,515,931	74	$ 398,864
• Kennett, MO:	$ 31,329,966	63	$ 497,301
• Kennewick-Pasco-Richland, WA:	$ 268,051,752	377	$ 711,013
• Kerrville, TX:	$ 61,561,854	113	$ 544,795
• Ketchikan, AK:	$ 23,419,833	57	$ 410,874
• Key West, FL:	$ 517,392,744	393	$1,316,521
• Kill Devil Hills, NC:	$ 183,740,486	274	$ 670,586
• Killeen-Temple-Fort Hood, TX:	$ 450,088,288	605	$ 743,948
• Kingsport-Bristol-Bristol, TN-VA:	$ 409,056,509	511	$ 800,502
• Kingston, NY:	$ 191,251,816	521	$ 367,086
• Kingsville, TX:	$ 69,037,871	77	$ 896,596
• Kinston, NC:	$ 74,144,193	101	$ 734,101
• Kirksville, MO:	$ 32,592,313	60	$ 543,205
• Klamath Falls, OR:	$ 76,064,687	146	$ 520,991
• Knoxville, TN:	$ 1,372,978,729	1,499	$ 915,930
• Kodiak, AK:	$ 15,142,123	28	$ 540,790
• Kokomo, IN:	$ 146,867,369	182	$ 806,964
• La Crosse, WI-MN:	$ 154,022,538	336	$ 458,400
• La Follette, TN:	$ 21,314,197	57	$ 373,933
• La Grande, OR:	$ 27,427,633	61	$ 449,633
• Laconia, NH:	$ 126,137,898	174	$ 724,930
• Lafayette, IN:	$ 281,321,895	390	$ 721,338
• Lafayette, LA:	$ 546,850,981	687	$ 795,999
• LaGrange, GA:	$ 95,364,702	150	$ 635,765
• Lake Charles, LA:	$ 257,939,069	390	$ 661,382

• Lake City, FL:	$ 69,599,425	118	$ 589,826
• Lake Havasu City-Kingman, AZ:	$ 293,887,203	444	$ 661,908
• Lakeland-Winter Haven, FL:	$ 624,147,233	848	$ 736,023
• Lamesa, TX:	$ 10,105,083	21	$ 481,194
• Lancaster, PA:	$ 578,412,243	892	$ 648,444
• Lancaster, SC:	$ 44,144,421	94	$ 469,622
• Lansing-East Lansing, MI:	$ 696,674,007	892	$ 781,025
• Laramie, WY:	$ 74,607,884	88	$ 847,817
• Laredo, TX:	$ 318,877,805	456	$ 699,293
• Las Cruces, NM:	$ 203,043,053	285	$ 712,432
• Las Vegas, NM:	$ 21,870,834	51	$ 428,840
• Las Vegas-Paradise, NV:	$ 5,116,724,284	4,727	$1,082,446
• Laurel, MS:	$ 81,466,189	132	$ 617,168
• Laurinburg, NC:	$ 47,757,531	57	$ 837,851
• Lawrence, KS:	$ 160,168,202	272	$ 588,854
• Lawrenceburg, TN:	$ 49,627,553	58	$ 855,647
• Lawton, OK:	$ 182,096,696	223	$ 816,577
• Lebanon, MO:	$ 43,966,504	64	$ 686,977
• Lebanon, NH-VT:	$ 269,119,485	465	$ 578,752
• Lebanon, PA:	$ 105,559,012	203	$ 519,995
• Levelland, TX:	$ 16,573,194	38	$ 436,137
• Lewisburg, PA:	$ 70,876,999	75	$ 945,027
• Lewisburg, TN:	$ 20,538,382	43	$ 477,637
• Lewiston, ID-WA:	$ 71,652,761	133	$ 538,743
• Lewiston-Auburn, ME:	$ 136,285,097	231	$ 589,979
• Lewistown, PA:	$ 20,940,037	83	$ 252,290
• Lexington, NE:	$ 26,609,462	63	$ 422,372
• Lexington Park, MD:	$ 123,471,961	173	$ 713,711
• Lexington-Fayette, KY:	$ 861,378,118	1,015	$ 848,648
• Liberal, KS:	$ 27,056,213	47	$ 575,664
• Lima, OH:	$ 210,911,681	214	$ 985,569
• Lincoln, IL:	$ 24,865,533	63	$ 394,691
• Lincoln, NE:	$ 412,422,107	680	$ 606,503
• Lincolnton, NC:	$ 50,408,070	117	$ 430,838
• Little Rock, AR:	$ 1,034,839,739	1,415	$ 731,336
• Lock Haven, PA:	$ 35,375,309	83	$ 426,209
• Logan, UT-ID:	$ 110,997,993	147	$ 755,088
• Logansport, IN:	$ 37,257,517	67	$ 556,082
• London, KY:	$ 44,964,403	111	$ 405,085
• Longview, TX:	$ 246,823,371	402	$ 613,988
• Longview, WA:	$ 127,782,988	198	$ 645,369
• Los Alamos, NM:	$ 16,605,214	33	$ 503,188
• Los Angeles-Long Beach, CA:	$23,251,412,252	30,173	$ 770,603
• Louisville-Jefferson Co., KY-IN:	$ 1,891,064,480	2,504	$ 755,217

• Lubbock, TX:	$ 362,065,913	580	$ 624,252
• Lufkin, TX:	$ 88,084,229	152	$ 579,502
• Lumberton, NC:	$ 127,082,089	171	$ 743,170
• Lynchburg, VA:	$ 311,394,546	434	$ 717,499
• Macomb, IL:	$ 55,071,545	74	$ 744,210
• Macon, GA:	$ 305,588,873	483	$ 632,689
• Madera-Chowchilla, CA:	$ 74,147,142	192	$ 386,183
• Madison, IN:	$ 37,638,834	65	$ 579,059
• Madison, WI:	$ 939,643,893	1,436	$ 654,348
• Madisonville, KY:	$ 53,893,167	64	$ 842,081
• Magnolia, AR:	$ 17,773,401	26	$ 683,592
• Malone, NY:	$ 32,569,747	111	$ 293,421
• Manchester-Nashua, NH:	$ 649,540,722	841	$ 772,343
• Manhattan, KS:	$ 194,840,563	227	$ 858,328
• Manitowoc, WI:	$ 69,152,377	171	$ 404,400
• Mankato-North Mankato, MN:	$ 143,655,597	194	$ 740,493
• Mansfield, OH:	$ 163,486,132	260	$ 628,793
• Marble Falls, TX:	$ 40,765,819	101	$ 403,622
• Marinette, WI-MI:	$ 58,768,573	192	$ 306,086
• Marion, IN:	$ 99,040,234	110	$ 900,366
• Marion, OH:	$ 59,527,140	132	$ 450,963
• Marion-Herrin, IL:	$ 114,632,574	148	$ 774,544
• Marquette, MI:	$ 77,238,683	155	$ 498,314
• Marshall, MN:	$ 33,697,480	56	$ 601,741
• Marshall, MO:	$ 12,914,481	40	$ 322,862
• Marshall, TX:	$ 57,133,964	81	$ 705,358
• Marshalltown, IA:	$ 37,968,971	66	$ 575,287
• Marshfield-Wisconsin Rapids, WI:	$ 83,723,785	145	$ 577,405
• Martin, TN:	$ 18,124,137	60	$ 302,069
• Martinsville, VA:	$ 75,117,792	91	$ 825,470
• Maryville, MO:	$ 28,159,505	42	$ 670,464
• Mason City, IA:	$ 71,086,034	145	$ 490,249
• Mayfield, KY:	$ 26,837,314	57	$ 470,830
• Maysville, KY:	$ 51,784,847	55	$ 941,543
• McAlester, OK:	$ 61,258,530	75	$ 816,780
• McAllen-Edinburg-Mission, TX:	$ 670,070,852	1,193	$ 561,669
• McComb, MS:	$ 50,274,693	89	$ 564,884
• McMinnville, TN:	$ 28,848,282	60	$ 480,805
• McPherson, KS:	$ 21,901,439	59	$ 371,211
• Meadville, PA:	$ 115,900,313	154	$ 752,599
• Medford, OR:	$ 341,534,399	529	$ 645,623
• Memphis, TN-MS-AR:	$ 1,899,004,034	2,435	$ 779,878
• Menomonie, WI:	$ 38,521,454	91	$ 423,313
• Merced, CA:	$ 226,558,840	359	$ 631,083

Meridian, MS:	$ 115,826,286	170	$ 681,331
Merrill, WI:	$ 19,231,728	69	$ 278,721
Mexico, MO:	$ 22,234,429	34	$ 653,954
Miami, OK:	$ 19,544,032	52	$ 375,847
Miami-Fort Lauderdale, FL:	$ 9,966,220,387	11,854	$ 840,747
Michigan City-La Porte, IN:	$ 132,884,354	263	$ 505,264
Middlesborough, KY:	$ 37,281,373	53	$ 703,422
Midland, MI:	$ 99,876,966	151	$ 661,437
Midland, TX:	$ 228,144,709	291	$ 784,002
Milledgeville, GA:	$ 68,263,352	109	$ 626,269
Milwaukee-Waukesha-W. Allis, WI:	$ 2,299,574,705	3,366	$ 683,177
Minden, LA:	$ 22,266,989	72	$ 309,264
Mineral Wells, TX:	$ 30,293,896	64	$ 473,342
Minneapolis, MN-WI:	$ 5,815,450,996	5,652	$1,028,919
Minot, ND:	$ 97,918,649	198	$ 494,539
Missoula, MT:	$ 202,767,566	298	$ 680,428
Mitchell, SD:	$ 28,957,999	60	$ 482,633
Moberly, MO:	$ 18,820,726	40	$ 470,518
Mobile, AL:	$ 572,710,768	737	$ 777,084
Modesto, CA:	$ 751,653,730	930	$ 808,230
Monroe, LA:	$ 233,860,741	357	$ 655,072
Monroe, MI:	$ 177,044,109	228	$ 776,509
Monroe, WI:	$ 32,622,830	83	$ 393,046
Montgomery, AL:	$ 485,661,245	692	$ 701,823
Montrose, CO:	$ 39,544,294	71	$ 556,962
Morehead City, NC:	$ 121,893,289	218	$ 559,144
Morgan City, LA:	$ 44,923,092	103	$ 436,147
Morgantown, WV:	$ 166,720,986	330	$ 505,215
Morristown, TN:	$ 144,934,810	200	$ 724,674
Moscow, ID:	$ 39,209,877	85	$ 461,293
Moses Lake, WA:	$ 82,530,234	156	$ 529,040
Moultrie, GA:	$ 32,246,524	64	$ 503,852
Mount Airy, NC:	$ 93,723,609	160	$ 585,773
Mount Pleasant, MI:	$ 71,877,774	122	$ 589,162
Mount Pleasant, TX:	$ 37,505,251	50	$ 750,105
Mount Sterling, KY:	$ 34,518,719	54	$ 639,236
Mount Vernon, IL:	$ 57,498,788	68	$ 845,570
Mount Vernon, OH:	$ 51,970,801	103	$ 504,571
Mount Vernon-Anacortes, WA:	$ 172,676,342	310	$ 557,020
Mountain Home, AR:	$ 40,543,908	93	$ 435,956
Mountain Home, ID:	$ 29,958,609	47	$ 637,417
Muncie, IN:	$ 163,003,939	201	$ 810,965
Murray, KY:	$ 52,517,942	75	$ 700,239
Muscatine, IA:	$ 39,950,285	91	$ 439,014

• Muskegon-Norton Shores, MI:	$ 194,649,666	327	$ 595,259
• Muskogee, OK:	$ 99,434,744	133	$ 747,630
• Myrtle Beach, SC:	$ 786,548,125	1,279	$ 614,971
• Nacogdoches, TX:	$ 73,550,113	115	$ 639,566
• Napa, CA:	$ 361,496,864	303	$1,193,059
• Naples-Marco Island, FL:	$ 774,543,740	879	$ 881,165
• Nashville-Davidson, TN:	$ 2,568,785,627	3,433	$ 748,263
• Natchez, MS-LA:	$ 62,097,278	120	$ 517,477
• Natchitoches, LA:	$ 67,887,258	78	$ 870,349
• New Bern, NC:	$ 179,536,795	234	$ 767,251
• New Castle, IN:	$ 49,557,957	66	$ 750,878
• New Castle, PA:	$ 77,999,866	168	$ 464,285
• New Haven-Milford, CT:	$ 1,324,481,346	2,108	$ 628,312
• New Iberia, LA:	$ 55,136,377	122	$ 451,938
• New Orleans-Metairie-Kenner, LA:	$ 2,344,809,069	3,374	$ 694,964
• New Philadelphia-Dover, OH:	$ 93,120,012	237	$ 392,911
• New Ulm, MN:	$ 25,321,048	57	$ 444,229
• New York, NY-NJ-PA:	$32,041,772,774	51,990	$ 616,306
• Newberry, SC:	$ 17,912,944	56	$ 319,874
• Newport, TN:	$ 31,631,519	67	$ 472,112
• Newton, IA:	$ 38,087,589	71	$ 536,445
• Niles-Benton Harbor, MI:	$ 201,530,668	363	$ 555,181
• Nogales, AZ:	$ 46,018,564	79	$ 582,513
• Norfolk, NE:	$ 46,853,303	90	$ 520,592
• North Platte, NE:	$ 50,992,204	89	$ 572,946
• North Port-Bradenton, FL:	$ 1,269,276,489	1,551	$ 818,360
• North Vernon, IN:	$ 18,096,747	33	$ 548,386
• North Wilkesboro, NC:	$ 77,584,534	82	$ 946,153
• Norwalk, OH:	$ 49,074,551	84	$ 584,221
• Norwich-New London, CT:	$ 531,583,922	691	$ 769,297
• Oak Harbor, WA:	$ 81,071,295	131	$ 618,865
• Oak Hill, WV:	$ 28,037,919	69	$ 406,347
• Ocala, FL:	$ 487,991,687	565	$ 863,702
• Ocean City, NJ:	$ 323,984,918	383	$ 845,914
• Ocean Pines, MD:	$ 272,258,996	387	$ 703,512
• Odessa, TX:	$ 209,285,461	295	$ 709,442
• Ogden-Clearfield, UT:	$ 477,418,189	717	$ 665,855
• Ogdensburg-Massena, NY:	$ 93,678,467	207	$ 452,553
• Oil City, PA:	$ 31,645,989	105	$ 301,390
• Okeechobee, FL:	$ 52,120,869	69	$ 755,375
• Oklahoma City, OK:	$ 1,806,386,272	2,762	$ 654,014
• Olean, NY:	$ 78,248,801	151	$ 518,204
• Olympia, WA:	$ 321,165,822	519	$ 618,817
• Omaha-Council Bluffs, NE-IA:	$ 1,307,664,157	1,794	$ 728,910

• Oneonta, NY:	$ 86,482,873	153	$ 565,248
• Ontario, OR-ID:	$ 40,898,846	87	$ 470,102
• Opelousas-Eunice, LA:	$ 46,888,019	120	$ 390,733
• Orangeburg, SC:	$ 106,386,332	125	$ 851,091
• Orlando-Kissimmee-Sanford, FL:	$ 4,937,150,679	4,765	$1,036,128
• Oshkosh-Neenah, WI:	$ 171,945,176	362	$ 474,987
• Oskaloosa, IA:	$ 17,451,666	41	$ 425,650
• Ottawa-Streator, IL:	$ 206,739,202	425	$ 486,445
• Ottumwa, IA:	$ 29,278,680	63	$ 464,741
• Owatonna, MN:	$ 36,836,432	69	$ 533,861
• Owensboro, KY:	$ 239,405,709	215	$1,113,515
• Owosso, MI:	$ 60,303,332	107	$ 563,583
• Oxford, MS:	$ 93,157,775	122	$ 763,588
• Oxnard-Thousand Oaks-Ventura, CA:	$ 1,170,030,031	1,705	$ 686,235
• Paducah, KY-IL:	$ 197,345,167	260	$ 759,020
• Pahrump, NV:	$ 29,452,122	63	$ 467,494
• Palatka, FL:	$ 77,253,783	115	$ 671,772
• Palestine, TX:	$ 40,463,776	65	$ 622,520
• Palm Bay-Melbourne, FL:	$ 954,832,733	1,125	$ 848,740
• Palm Coast, FL:	$ 74,186,975	153	$ 484,882
• Pampa, TX:	$ 21,824,686	43	$ 507,551
• Panama City-Lynn Haven, FL:	$ 453,639,299	556	$ 815,898
• Paragould, AR:	$ 31,130,257	70	$ 444,718
• Paris, TN:	$ 32,491,703	64	$ 507,683
• Paris, TX:	$ 73,074,072	78	$ 936,847
• Parkersburg-Marietta-Vienna, WV:	$ 270,630,902	365	$ 741,455
• Parsons, KS:	$ 14,901,813	27	$ 551,919
• Pascagoula, MS:	$ 181,371,872	269	$ 674,245
• Payson, AZ:	$ 57,257,742	109	$ 525,300
• Pecos, TX:	$ 8,309,304	21	$ 395,681
• Pella, IA:	$ 24,319,663	62	$ 392,253
• Pendleton-Hermiston, OR:	$ 83,509,475	154	$ 542,269
• Pensacola-Ferry Pass-Brent, FL:	$ 693,901,790	838	$ 828,045
• Peoria, IL:	$ 474,979,260	887	$ 535,490
• Peru, IN:	$ 24,640,146	54	$ 456,299
• Philadelphia, PA-NJ-DE-MD:	$ 8,903,151,057	13,879	$ 641,484
• Phoenix Lake-Cedar Ridge, CA:	$ 75,225,252	138	$ 545,111
• Phoenix-Mesa-Glendale, AZ:	$ 6,637,341,291	7,349	$ 903,163
• Picayune, MS:	$ 46,038,397	85	$ 541,628
• Pierre, SD:	$ 27,118,025	41	$ 661,415
• Pierre Part, LA:	$ 4,070,726	21	$ 193,844
• Pine Bluff, AR:	$ 81,757,443	117	$ 698,782
• Pittsburg, KS:	$ 60,558,887	85	$ 712,457
• Pittsburgh, PA:	$ 3,660,132,173	5,571	$ 656,997

•	Pittsfield, MA:	$ 225,667,504	419	$ 538,586
•	Plainview, TX:	$ 46,459,695	51	$ 910,974
•	Platteville, WI:	$ 28,844,190	137	$ 210,542
•	Plattsburgh, NY:	$ 90,480,477	177	$ 511,189
•	Plymouth, IN:	$ 46,558,997	82	$ 567,793
•	Pocatello, ID:	$ 100,192,473	164	$ 610,930
•	Point Pleasant, WV-OH:	$ 42,849,547	89	$ 481,456
•	Ponca City, OK:	$ 54,911,766	61	$ 900,193
•	Pontiac, IL:	$ 32,112,480	80	$ 401,406
•	Poplar Bluff, MO:	$ 58,153,383	75	$ 775,378
•	Port Angeles, WA:	$ 96,846,879	185	$ 523,497
•	Port St. Lucie, FL:	$ 611,498,176	768	$ 796,222
•	Portales, NM:	$ 22,972,476	27	$ 850,832
•	Portland, ME:	$ 972,873,501	1,511	$ 643,861
•	Portland-Vancouver, OR-WA:	$ 3,817,680,458	5,320	$ 717,609
•	Portsmouth, OH:	$ 95,873,858	141	$ 679,956
•	Pottsville, PA:	$ 108,177,357	345	$ 313,558
•	Poughkeepsie-Newburgh, NY:	$ 768,211,143	1,770	$ 434,018
•	Prescott, AZ:	$ 265,336,577	478	$ 555,097
•	Price, UT:	$ 16,483,087	34	$ 484,797
•	Prineville, OR:	$ 22,813,272	35	$ 651,808
•	Providence, RI-MA:	$ 2,869,201,486	3,791	$ 756,846
•	Provo-Orem, UT:	$ 357,543,654	626	$ 571,156
•	Pueblo, CO:	$ 206,126,432	284	$ 725,797
•	Pullman, WA:	$ 38,878,798	93	$ 418,052
•	Punta Gorda, FL:	$ 213,906,446	343	$ 623,634
•	Quincy, IL-MO:	$ 97,067,951	159	$ 610,490
•	Racine, WI:	$ 224,564,415	400	$ 561,411
•	Raleigh-Cary, NC:	$ 1,572,443,497	2,270	$ 692,706
•	Rapid City, SD:	$ 206,660,513	292	$ 707,741
•	Raymondville, TX:	$ 12,046,377	17	$ 708,610
•	Reading, PA:	$ 404,152,813	853	$ 473,802
•	Red Bluff, CA:	$ 85,457,311	118	$ 724,215
•	Red Wing, MN:	$ 61,946,291	86	$ 720,306
•	Redding, CA:	$ 252,652,683	436	$ 579,479
•	Reno-Sparks, NV:	$ 770,111,177	973	$ 791,481
•	Rexburg, ID:	$ 27,549,127	89	$ 309,541
•	Richmond, IN:	$ 126,397,161	163	$ 775,443
•	Richmond, VA:	$ 1,782,878,735	2,439	$ 730,988
•	Richmond-Berea, KY:	$ 110,077,803	145	$ 759,157
•	Rio Grande City-Roma, TX:	$ 42,562,680	74	$ 575,171
•	Riverside, CA:	$ 5,544,092,346	7,185	$ 771,620
•	Riverton, WY:	$ 37,675,625	95	$ 396,586
•	Roanoke, VA:	$ 525,265,334	644	$ 815,629

• Roanoke Rapids, NC:	$ 67,644,280	115	$ 588,211
• Rochelle, IL:	$ 31,623,370	110	$ 287,485
• Rochester, MN:	$ 245,411,936	340	$ 721,800
• Rochester, NY:	$ 1,326,224,855	2,237	$ 592,859
• Rock Springs, WY:	$ 59,550,006	112	$ 531,696
• Rockford, IL:	$ 469,713,030	619	$ 758,826
• Rockingham, NC:	$ 41,631,574	73	$ 570,296
• Rockland, ME:	$ 66,532,166	96	$ 693,043
• Rocky Mount, NC:	$ 200,226,170	267	$ 749,911
• Rolla, MO:	$ 71,097,308	89	$ 798,846
• Rome, GA:	$ 189,568,865	189	$1,003,010
• Roseburg, OR:	$ 121,065,656	259	$ 467,435
• Roswell, NM:	$ 60,600,339	93	$ 651,617
• Ruidoso, NM:	$ 47,966,575	84	$ 571,031
• Russellville, AR:	$ 72,657,489	120	$ 605,479
• Ruston, LA:	$ 62,185,905	76	$ 818,236
• Rutland, VT:	$ 93,099,492	196	$ 474,997
• Sacramento-Arden, CA:	$ 3,413,970,613	4,431	$ 770,474
• Safford, AZ:	$ 34,606,808	71	$ 487,420
• Saginaw-Saginaw Township N., MI:	$ 307,798,407	367	$ 838,688
• Salem, OR:	$ 514,839,883	751	$ 685,539
• Salina, KS:	$ 74,135,987	125	$ 593,088
• Salinas, CA:	$ 696,202,717	929	$ 749,411
• Salisbury, MD:	$ 161,553,694	194	$ 832,751
• Salisbury, NC:	$ 142,893,372	202	$ 707,393
• Salt Lake City, UT:	$ 1,490,426,940	2,099	$ 710,065
• San Angelo, TX:	$ 147,939,200	241	$ 613,856
• San Antonio-New Braunfels, TX:	$ 3,554,416,682	4,529	$ 784,813
• San Diego-Carlsbad, CA:	$ 6,475,444,826	6,952	$ 931,451
• San Francisco-Oakland, CA:	$ 9,788,633,392	11,954	$ 818,858
• San Jose-Sunnyvale, CA:	$ 3,325,702,036	3,888	$ 855,376
• San Luis Obispo-Paso Robles, CA:	$ 470,250,374	819	$ 574,176
• Sandusky, OH:	$ 156,798,581	216	$ 725,919
• Sanford, NC:	$ 75,618,808	97	$ 779,575
• Santa Barbara, CA:	$ 845,657,637	1,016	$ 832,340
• Santa Cruz-Watsonville, CA:	$ 486,134,218	651	$ 746,750
• Santa Fe, NM:	$ 299,373,737	393	$ 761,765
• Santa Rosa-Petaluma, CA:	$ 731,154,156	1,188	$ 615,450
• Sault Ste. Marie, MI:	$ 35,208,346	87	$ 404,694
• Savannah, GA:	$ 679,239,957	942	$ 721,062
• Sayre, PA:	$ 45,926,616	121	$ 379,559
• Scottsbluff, NE:	$ 41,983,830	97	$ 432,823
• Scottsboro, AL:	$ 39,492,996	80	$ 493,662
• Scottsburg, IN:	$ 21,813,792	26	$ 838,992

•	Scranton--Wilkes-Barre, PA:	$ 881,382,562	1,659	$ 531,273
•	Seaford, DE:	$ 379,262,260	576	$ 658,441
•	Searcy, AR:	$ 102,291,442	131	$ 780,851
•	Seattle-Tacoma-Bellevue, WA:	$ 5,869,107,439	8,543	$ 687,008
•	Sebastian-Vero Beach, FL:	$ 215,482,177	305	$ 706,499
•	Sebring, FL:	$ 66,538,432	158	$ 421,129
•	Sedalia, MO:	$ 58,762,214	75	$ 783,496
•	Selinsgrove, PA:	$ 60,710,932	69	$ 879,869
•	Selma, AL:	$ 30,870,793	48	$ 643,142
•	Seneca, SC:	$ 77,243,329	98	$ 788,197
•	Seneca Falls, NY:	$ 30,877,436	79	$ 390,854
•	Sevierville, TN:	$ 388,712,248	355	$1,094,964
•	Seymour, IN:	$ 45,065,031	86	$ 524,012
•	Shawnee, OK:	$ 106,004,892	108	$ 981,527
•	Sheboygan, WI:	$ 113,080,522	276	$ 409,712
•	Shelby, NC:	$ 92,537,503	164	$ 564,253
•	Shelbyville, TN:	$ 28,801,842	57	$ 505,295
•	Shelton, WA:	$ 47,277,333	94	$ 502,950
•	Sheridan, WY:	$ 36,849,839	82	$ 449,388
•	Sherman-Denison, TX:	$ 166,882,760	240	$ 695,345
•	Show Low, AZ:	$ 109,204,735	207	$ 527,559
•	Shreveport-Bossier City, LA:	$ 540,471,056	839	$ 644,185
•	Sidney, OH:	$ 57,885,188	86	$ 673,084
•	Sierra Vista-Douglas, AZ:	$ 156,472,874	226	$ 692,358
•	Sikeston, MO:	$ 57,384,706	67	$ 856,488
•	Silver City, NM:	$ 19,740,728	66	$ 299,102
•	Silverthorne, CO:	$ 139,336,802	186	$ 749,123
•	Sioux City, IA-NE-SD:	$ 184,470,474	346	$ 533,152
•	Sioux Falls, SD:	$ 406,386,680	485	$ 837,911
•	Snyder, TX:	$ 16,105,419	50	$ 322,108
•	Somerset, KY:	$ 74,126,534	106	$ 699,307
•	Somerset, PA:	$ 87,692,636	143	$ 613,235
•	South Bend-Mishawaka, IN-MI:	$ 475,285,608	628	$ 756,824
•	Southern Pines-Pinehurst, NC:	$ 122,393,333	207	$ 591,272
•	Spartanburg, SC:	$ 498,443,669	581	$ 857,906
•	Spearfish, SD:	$ 49,664,939	72	$ 689,791
•	Spencer, IA:	$ 16,922,696	45	$ 376,060
•	Spirit Lake, IA:	$ 20,835,719	59	$ 353,148
•	Spokane, WA:	$ 635,742,719	994	$ 639,580
•	Springfield, IL:	$ 491,441,709	583	$ 842,953
•	Springfield, MA:	$ 954,593,537	1,420	$ 672,249
•	Springfield, MO:	$ 657,814,163	905	$ 726,866
•	Springfield, OH:	$ 203,823,329	253	$ 805,626
•	St. Cloud, MN:	$ 277,065,182	367	$ 754,946

• St. George, UT:	$ 189,738,588	231	$ 821,379
• St. Joseph, MO-KS:	$ 140,444,809	242	$ 580,350
• St. Louis, MO-IL:	$ 4,821,352,799	5,701	$ 845,703
• St. Marys, GA:	$ 54,154,984	93	$ 582,312
• St. Marys, PA:	$ 25,832,847	63	$ 410,045
• Starkville, MS:	$ 66,071,749	80	$ 825,897
• State College, PA:	$ 238,002,923	314	$ 757,971
• Statesboro, GA:	$ 103,649,156	155	$ 668,704
• Statesville-Mooresville, NC:	$ 271,435,002	323	$ 840,356
• Staunton-Waynesboro, VA:	$ 133,340,419	221	$ 603,350
• Stephenville, TX:	$ 74,582,872	97	$ 768,896
• Sterling, CO:	$ 19,803,656	42	$ 471,516
• Sterling, IL:	$ 43,852,625	138	$ 317,773
• Steubenville-Weirton, OH-WV:	$ 113,618,042	336	$ 338,149
• Stevens Point, WI:	$ 99,499,354	162	$ 614,194
• Stillwater, OK:	$ 125,815,578	160	$ 786,347
• Stockton, CA:	$ 824,222,473	1,176	$ 700,869
• Storm Lake, IA:	$ 14,020,316	43	$ 326,054
• Sturgis, MI:	$ 36,776,251	124	$ 296,583
• Sulphur Springs, TX:	$ 21,553,065	59	$ 365,306
• Summerville, GA:	$ 9,355,159	33	$ 283,490
• Sumter, SC:	$ 104,350,309	201	$ 519,156
• Sunbury, PA:	$ 57,882,176	142	$ 407,621
• Susanville, CA:	$ 18,828,930	46	$ 409,325
• Sweetwater, TX:	$ 23,160,279	35	$ 661,722
• Syracuse, NY:	$ 984,869,562	1,514	$ 650,508
• Tahlequah, OK:	$ 31,987,912	71	$ 450,534
• Talladega-Sylacauga, AL:	$ 63,680,495	121	$ 526,285
• Tallahassee, FL:	$ 559,923,816	761	$ 735,774
• Tallulah, LA:	$ 1,763,160	14	$ 125,940
• Tampa-St. Petersburg, FL:	$ 4,630,771,185	5,839	$ 793,076
• Taos, NM:	$ 61,926,902	116	$ 533,853
• Taylorville, IL:	$ 25,427,419	84	$ 302,707
• Terre Haute, IN:	$ 266,992,831	356	$ 749,980
• Texarkana, AR:	$ 244,226,348	283	$ 862,991
• The Dalles, OR:	$ 36,330,962	63	$ 576,682
• The Villages, FL:	$ 117,500,899	132	$ 890,158
• Thomaston, GA:	$ 27,121,392	58	$ 467,610
• Thomasville, GA:	$ 50,241,817	85	$ 591,080
• Thomasville-Lexington, NC:	$ 148,480,077	207	$ 717,295
• Tiffin, OH:	$ 39,716,987	103	$ 385,602
• Tifton, GA:	$ 76,823,950	88	$ 872,999
• Toccoa, GA:	$ 23,154,415	50	$ 463,088
• Toledo, OH:	$ 1,041,003,422	1,531	$ 679,950

• Topeka, KS:	$ 345,114,492	454	$ 760,164
• Torrington, CT:	$ 193,812,039	414	$ 468,145
• Traverse City, MI:	$ 230,742,332	360	$ 640,951
• Trenton-Ewing, NJ:	$ 658,864,138	895	$ 736,161
• Troy, AL:	$ 51,778,201	50	$1,035,564
• Truckee-Grass Valley, CA:	$ 128,907,991	248	$ 519,790
• Tucson, AZ:	$ 1,464,858,353	1,691	$ 866,268
• Tullahoma, TN:	$ 65,876,145	189	$ 348,551
• Tulsa, OK:	$ 1,266,266,474	1,965	$ 644,410
• Tupelo, MS:	$ 151,082,436	286	$ 528,260
• Tuscaloosa, AL:	$ 280,120,972	390	$ 718,259
• Tuskegee, AL:	$ 30,582,702	24	$1,274,279
• Twin Falls, ID:	$ 111,639,407	198	$ 563,835
• Tyler, TX:	$ 335,693,723	405	$ 828,873
• Ukiah, CA:	$ 112,358,630	255	$ 440,622
• Union, SC:	$ 15,426,312	42	$ 367,293
• Union City, TN-KY:	$ 58,360,856	67	$ 871,058
• Urbana, OH:	$ 29,324,705	54	$ 543,050
• Utica-Rome, NY:	$ 290,841,846	656	$ 443,356
• Uvalde, TX:	$ 331,733,066	286	$1,159,906
• Vallejo-Fairfield, CA:	$ 647,839,827	803	$ 806,774
• Valley, AL:	$ 24,380,409	56	$ 435,364
• Van Wert, OH:	$ 13,579,911	48	$ 282,915
• Vermillion, SD:	$ 12,821,029	32	$ 400,657
• Vernal, UT:	$ 22,915,755	43	$ 532,925
• Vernon, TX:	$ 12,533,486	33	$ 379,803
• Vicksburg, MS:	$ 49,349,009	91	$ 542,297
• Victoria, TX:	$ 129,720,158	269	$ 482,231
• Vidalia, GA:	$ 38,897,518	79	$ 492,374
• Vincennes, IN:	$ 53,357,991	80	$ 666,975
• Vineland-Millville-Bridgeton, NJ:	$ 154,361,568	200	$ 771,808
• Virginia Beach, VA-NC:	$ 2,800,021,525	3,648	$ 767,550
• Visalia-Porterville, CA:	$ 307,070,106	701	$ 438,046
• Wabash, IN:	$ 23,141,109	62	$ 373,244
• Waco, TX:	$ 344,767,613	488	$ 706,491
• Wahpeton, ND-MN:	$ 26,857,233	47	$ 571,430
• Walla Walla, WA:	$ 53,229,711	119	$ 447,308
• Walterboro, SC:	$ 27,631,653	67	$ 412,413
• Wapakoneta, OH:	$ 42,893,670	86	$ 498,764
• Warner Robins, GA:	$ 206,950,595	279	$ 741,758
• Warren, PA:	$ 44,848,416	94	$ 477,111
• Warrensburg, MO:	$ 45,420,237	77	$ 589,873
• Warsaw, IN:	$ 89,324,281	166	$ 538,098
• Washington, DC-VA-MD-WV:	$11,556,174,775	11,504	$1,004,535

•	Washington, NC:	$ 47,473,130	58	$ 818,502
•	Washington, IN:	$ 15,561,055	58	$ 268,294
•	Washington Court House, OH:	$ 37,034,625	51	$ 726,169
•	Waterloo-Cedar Falls, IA:	$ 229,865,067	365	$ 629,767
•	Watertown, SD:	$ 43,636,232	89	$ 490,295
•	Watertown-Fort Atkinson, WI:	$ 96,930,386	162	$ 598,336
•	Watertown-Fort Drum, NY:	$ 135,854,899	217	$ 626,059
•	Wauchula, FL:	$ 12,604,818	34	$ 370,730
•	Wausau, WI:	$ 172,077,924	289	$ 595,425
•	Waycross, GA:	$ 58,600,218	89	$ 658,429
•	Weatherford, OK:	$ 29,296,251	64	$ 457,754
•	Wenatchee-East Wenatchee, WA:	$ 109,925,369	204	$ 538,850
•	West Plains, MO:	$ 43,645,848	86	$ 507,510
•	West Point, MS:	$ 12,938,203	38	$ 340,479
•	Wheeling, WV-OH:	$ 207,918,183	371	$ 560,426
•	Whitewater, WI:	$ 131,068,821	274	$ 478,353
•	Wichita, KS:	$ 857,220,617	1,338	$ 640,673
•	Wichita Falls, TX:	$ 220,885,885	280	$ 788,878
•	Williamsport, PA:	$ 121,266,702	282	$ 430,024
•	Willimantic, CT:	$ 127,330,262	211	$ 603,461
•	Williston, ND:	$ 21,861,763	54	$ 404,847
•	Willmar, MN:	$ 40,756,424	64	$ 636,819
•	Wilmington, NC:	$ 634,797,555	942	$ 673,883
•	Wilmington, OH:	$ 39,668,364	65	$ 610,283
•	Wilson, NC:	$ 107,983,197	149	$ 724,719
•	Winchester, VA-WV:	$ 197,731,877	279	$ 708,716
•	Winfield, KS:	$ 26,333,701	66	$ 398,995
•	Winona, MN:	$ 53,669,597	100	$ 536,696
•	Winston-Salem, NC:	$ 706,817,925	940	$ 751,934
•	Woodward, OK:	$ 25,155,988	47	$ 535,234
•	Wooster, OH:	$ 107,710,264	168	$ 641,133
•	Worcester, MA:	$ 1,328,726,129	1,712	$ 776,125
•	Worthington, MN:	$ 19,409,115	39	$ 497,670
•	Yakima, WA:	$ 212,892,767	412	$ 516,730
•	Yankton, SD:	$ 33,307,102	57	$ 584,335
•	Yazoo City, MS:	$ 2,796,042	34	$ 82,237
•	York-Hanover, PA:	$ 445,555,800	779	$ 571,959
•	Youngstown-Warren, OH-PA:	$ 775,679,813	1,255	$ 618,072
•	Yuba City, CA:	$ 137,249,137	265	$ 517,921
•	Yuma, AZ:	$ 203,133,208	260	$ 781,282
•	Zanesville, OH:	$ 154,075,031	175	$ 880,429

11

CONSUMER SPENDING AT RESTAURANTS

11.1 Overview

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

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

Combined, there are 942 MSAs and µSAs.

11.2 Per Capita Spending

Per capita income, restaurant sales per capita, and restaurant sales as percentage of per capita income for each for each MSA and µSA are as follows (source: *Restaurant Business* [February 2013]):

	Per Capita Income	Restaurant Spending	Pct. of Income
• Abbeville, LA:	$19,260	$ 598	3.10%
• Aberdeen, WA:	$20,121	$1,220	6.06%
• Aberdeen, SD:	$23,419	$1,285	5.49%
• Abilene, TX:	$19,976	$1,673	8.38%
• Ada, OK:	$18,800	$ 640	3.40%
• Adrian, MI:	$22,376	$1,146	5.12%
• Akron, OH:	$25,739	$1,545	6.00%
• Alamogordo, NM:	$17,421	$ 982	5.64%
• Albany, GA:	$19,596	$1,302	6.64%
• Albany-Lebanon, OR:	$21,000	$1,104	5.25%
• Albany-Schenectady-Troy, NY:	$28,579	$1,445	5.06%
• Albemarle, NC:	$20,319	$ 808	3.98%
• Albert Lea, MN:	$22,082	$ 930	4.21%
• Albertville, AL:	$19,108	$1,491	7.80%
• Albuquerque, NM:	$24,190	$1,658	6.85%
• Alexander City, AL:	$19,485	$ 564	2.89%
• Alexandria, LA:	$19,938	$1,123	5.63%
• Alexandria, MN:	$23,360	$1,149	4.92%
• Alice, TX:	$15,861	$1,293	8.15%

• Allegan, MI:	$22,345	$ 910	4.07%
• Allentown-Bethlehem, PA-NJ:	$26,905	$1,249	4.64%
• Alma, MI:	$18,511	$1,174	6.34%
• Alpena, MI:	$19,498	$ 735	3.77%
• Altoona, PA:	$20,490	$1,349	6.58%
• Altus, OK:	$19,261	$1,163	6.04%
• Amarillo, TX:	$21,393	$1,515	7.08%
• Americus, GA:	$16,710	$1,128	6.75%
• Ames, IA:	$23,194	$1,266	5.46%
• Amsterdam, NY:	$21,675	$1,005	4.64%
• Anchorage, AK:	$30,481	$2,083	6.83%
• Anderson, IN:	$21,846	$1,294	5.92%
• Anderson, SC:	$21,212	$ 964	4.54%
• Andrews, TX:	$20,422	$1,238	6.06%
• Angola, IN:	$22,140	$1,154	5.21%
• Ann Arbor, MI:	$30,856	$1,518	4.92%
• Anniston-Oxford, AL:	$20,836	$1,321	6.34%
• Appleton, WI:	$25,882	$1,622	6.27%
• Arcadia, FL:	$15,255	$ 304	1.99%
• Ardmore, OK:	$19,752	$1,006	5.09%
• Arkadelphia, AR:	$16,237	$1,180	7.27%
• Asheville, NC:	$23,628	$1,619	6.85%
• Ashland, OH:	$20,388	$ 699	3.43%
• Ashtabula, OH:	$19,352	$ 891	4.60%
• Astoria, OR:	$22,597	$2,491	11.02%
• Atchison, KS:	$18,733	$ 584	3.12%
• Athens, OH:	$16,786	$1,024	6.10%
• Athens, TN:	$18,971	$1,219	6.43%
• Athens, TX:	$20,659	$ 775	3.75%
• Athens-Clarke County, GA:	$21,332	$1,478	6.93%
• Atlanta-Sandy Springs, GA:	$27,492	$1,762	6.41%
• Atlantic City-Hammonton, NJ:	$25,171	$2,593	10.30%
• Auburn, IN:	$21,482	$1,341	6.24%
• Auburn, NY:	$22,433	$ 983	4.38%
• Auburn-Opelika, AL:	$21,676	$1,272	5.87%
• Augusta-Richmond County, GA-SC:	$21,971	$1,430	6.51%
• Augusta-Waterville, ME:	$22,743	$1,222	5.37%
• Austin, MN:	$22,766	$1,003	4.41%
• Austin-Round Rock-San Marcos, TX:	$27,535	$1,675	6.08%
• Bainbridge, GA:	$16,768	$ 759	4.53%
• Bakersfield-Delano, CA:	$19,063	$1,242	6.52%
• Baltimore-Towson, MD:	$31,528	$1,834	5.82%
• Bangor, ME:	$21,963	$1,320	6.01%
• Baraboo, WI:	$23,875	$2,630	11.02%

• Barnstable Town, MA:	$31,813	$3,139	9.87%
• Barre, VT:	$27,467	$1,255	4.57%
• Bartlesville, OK:	$24,407	$1,376	5.64%
• Bastrop, LA:	$16,468	$ 787	4.78%
• Batavia, NY:	$22,169	$1,036	4.67%
• Batesville, AR:	$18,777	$1,041	5.54%
• Baton Rouge, LA:	$23,067	$1,267	5.49%
• Battle Creek, MI:	$20,594	$1,072	5.20%
• Bay City, MI:	$22,628	$1,816	8.02%
• Bay City, TX:	$19,097	$1,012	5.30%
• Beatrice, NE:	$21,051	$1,024	4.87%
• Beaumont-Port Arthur, TX:	$21,792	$1,285	5.89%
• Beaver Dam, WI:	$23,413	$ 609	2.60%
• Beckley, WV:	$20,743	$1,494	7.20%
• Bedford, IN:	$20,435	$ 986	4.83%
• Beeville, TX:	$12,576	$ 745	5.93%
• Bellefontaine, OH:	$22,683	$ 998	4.40%
• Bellingham, WA:	$23,604	$1,437	6.09%
• Bemidji, MN:	$19,621	$1,056	5.38%
• Bend, OR:	$27,269	$1,704	6.25%
• Bennettsville, SC:	$14,323	$ 334	2.33%
• Bennington, VT:	$26,040	$1,516	5.82%
• Berlin, NH-VT:	$20,843	$1,459	7.00%
• Big Rapids, MI:	$18,271	$1,021	5.59%
• Big Spring, TX:	$17,860	$1,030	5.77%
• Billings, MT:	$24,599	$1,758	7.15%
• Binghamton, NY:	$23,123	$1,394	6.03%
• Birmingham-Hoover, AL:	$25,350	$1,395	5.50%
• Bishop, CA:	$25,338	$2,615	10.32%
• Bismarck, ND:	$25,225	$1,308	5.18%
• Blackfoot, ID:	$17,341	$ 458	2.64%
• Blacksburg, VA:	$21,451	$1,507	7.03%
• Bloomington, IN:	$21,441	$1,572	7.33%
• Bloomington-Normal, IL:	$26,711	$1,662	6.22%
• Bloomsburg-Berwick, PA:	$21,371	$1,509	7.06%
• Bluefield, WV-VA:	$19,085	$1,268	6.64%
• Blytheville, AR:	$17,028	$ 867	5.09%
• Bogalusa, LA:	$16,127	$ 573	3.56%
• Boise City-Nampa, ID:	$23,416	$1,368	5.84%
• Bonham, TX:	$18,861	$ 586	3.11%
• Boone, IA:	$23,245	$ 498	2.14%
• Boone, NC:	$20,028	$2,372	11.84%
• Borger, TX:	$21,191	$1,225	5.78%
• Boston-Cambridge-Quincy, MA-NH:	$34,530	$2,132	6.18%

• Boulder, CO:	$34,080	$2,014	5.91%
• Bowling Green, KY:	$21,785	$1,713	7.86%
• Bozeman, MT:	$24,611	$1,987	8.07%
• Bradford, PA:	$19,322	$ 765	3.96%
• Brainerd, MN:	$22,174	$1,528	6.89%
• Branson, MO:	$20,568	$1,977	9.61%
• Bremerton-Silverdale, WA:	$28,140	$1,166	4.14%
• Brenham, TX:	$21,398	$1,337	6.25%
• Brevard, NC:	$21,716	$ 915	4.22%
• Bridgeport-Stamford-Norwalk, CT:	$42,983	$1,604	3.73%
• Brigham City, UT:	$18,658	$ 430	2.30%
• Brookhaven, MS:	$18,026	$1,163	6.45%
• Brookings, OR:	$21,790	$1,807	8.29%
• Brookings, SD:	$21,466	$1,494	6.96%
• Brownsville, TN:	$17,148	$ 457	2.67%
• Brownsville-Harlingen, TX:	$12,732	$ 954	7.50%
• Brownwood, TX:	$19,296	$ 950	4.92%
• Brunswick, GA:	$24,675	$2,467	10.00%
• Bucyrus, OH:	$20,149	$ 933	4.63%
• Buffalo-Niagara Falls, NY:	$24,536	$1,568	6.39%
• Burley, ID:	$16,792	$ 637	3.79%
• Burlington, IA-IL:	$21,876	$1,156	5.28%
• Burlington, NC:	$21,297	$1,796	8.43%
• Burlington-South Burlington, VT:	$27,712	$1,595	5.75%
• Butte-Silver Bow, MT:	$21,403	$1,451	6.78%
• Cadillac, MI:	$19,055	$1,165	6.11%
• Calhoun, GA:	$18,943	$1,229	6.49%
• Cambridge, OH:	$18,045	$1,367	7.58%
• Cambridge, MD:	$23,827	$ 913	3.83%
• Camden, AR:	$17,199	$ 464	2.70%
• Campbellsville, KY:	$18,449	$1,199	6.50%
• Canon City, CO:	$18,945	$ 732	3.86%
• Canton, IL:	$20,583	$ 665	3.23%
• Canton-Massillon, OH:	$22,812	$1,490	6.53%
• Cape Coral-Fort Myers, FL:	$28,797	$2,112	7.33%
• Cape Girardeau-Jackson, MO-IL:	$21,418	$2,269	10.59%
• Carbondale, IL:	$19,518	$1,420	7.27%
• Carlsbad-Artesia, NM:	$21,189	$ 995	4.70%
• Carson City, NV:	$24,673	$1,650	6.69%
• Casper, WY:	$25,080	$1,716	6.84%
• Cedar City, UT:	$16,385	$1,024	6.25%
• Cedar Rapids, IA:	$25,937	$1,213	4.68%
• Cedartown, GA:	$17,954	$ 625	3.48%
• Celina, OH:	$22,107	$1,049	4.74%

• Central City, KY:	$17,966	$1,028	5.72%
• Centralia, IL:	$19,530	$ 837	4.28%
• Centralia, WA:	$20,526	$1,030	5.02%
• Chambersburg, PA:	$23,912	$ 982	4.11%
• Champaign-Urbana, IL:	$23,349	$1,320	5.66%
• Charleston, SC:	$24,545	$2,008	8.18%
• Charleston, WV:	$23,654	$1,235	5.22%
• Charleston-Mattoon, IL:	$19,420	$1,230	6.33%
• Charlotte-Gastonia, NC-SC:	$27,241	$1,726	6.34%
• Charlottesville, VA:	$30,434	$2,197	7.22%
• Chattanooga, TN-GA:	$22,977	$1,759	7.65%
• Chester, SC:	$16,923	$ 580	3.43%
• Cheyenne, WY:	$25,262	$1,842	7.29%
• Chicago, IL-IN-WI:	$28,187	$1,871	6.64%
• Chico, CA:	$21,405	$1,400	6.54%
• Chillicothe, OH:	$19,663	$1,249	6.35%
• Cincinnati-Middletown, OH-KY-IN:	$26,758	$1,604	6.00%
• Claremont, NH:	$26,560	$ 474	1.79%
• Clarksburg, WV:	$20,030	$1,332	6.65%
• Clarksdale, MS:	$14,381	$ 555	3.86%
• Clarksville, TN-KY:	$20,110	$1,226	6.10%
• Clearlake, CA:	$21,508	$ 589	2.74%
• Cleveland, MS:	$13,999	$1,197	8.55%
• Cleveland, TN:	$20,106	$1,134	5.64%
• Cleveland-Elyria-Mentor, OH:	$25,720	$1,615	6.28%
• Clewiston, FL:	$14,727	$ 755	5.13%
• Clinton, IA:	$21,341	$ 911	4.27%
• Clovis, NM:	$18,373	$1,253	6.82%
• Coeur d’Alene, ID:	$21,812	$1,255	5.76%
• Coffeyville, KS:	$19,782	$ 906	4.58%
• Coldwater, MI:	$19,263	$1,669	8.67%
• College Station-Bryan, TX:	$19,987	$1,554	7.77%
• Colorado Springs, CO:	$26,300	$1,531	5.82%
• Columbia, TN:	$22,056	$1,373	6.22%
• Columbia, MO:	$23,932	$1,494	6.24%
• Columbia, SC:	$24,408	$1,349	5.53%
• Columbus, GA-AL:	$21,354	$1,898	8.89%
• Columbus, IN:	$25,092	$1,342	5.35%
• Columbus, MS:	$18,863	$1,709	9.06%
• Columbus, NE:	$22,196	$1,084	4.89%
• Columbus, OH:	$26,995	$1,946	7.21%
• Concord, NH:	$28,743	$1,345	4.68%
• Connersville, IN:	$19,284	$1,152	5.97%
• Cookeville, TN:	$17,478	$1,553	8.88%

• Coos Bay, OR:	$20,764	$1,238	5.96%
• Corbin, KY:	$15,450	$2,369	15.33%
• Cordele, GA:	$16,602	$1,716	10.34%
• Corinth, MS:	$17,940	$1,115	6.22%
• Cornelia, GA:	$19,731	$1,233	6.25%
• Corning, NY:	$22,352	$ 947	4.24%
• Corpus Christi, TX:	$20,366	$1,634	8.02%
• Corsicana, TX:	$17,974	$ 817	4.55%
• Cortland, NY:	$20,896	$1,327	6.35%
• Corvallis, OR:	$26,219	$1,317	5.02%
• Coshocton, OH:	$18,804	$ 583	3.10%
• Crawfordsville, IN:	$22,196	$1,082	4.87%
• Crescent City, CA:	$17,521	$ 856	4.89%
• Crestview, FL:	$26,986	$3,154	11.69%
• Crossville, TN:	$20,175	$ 844	4.18%
• Crowley, LA:	$17,482	$ 630	3.60%
• Cullman, AL:	$19,863	$1,034	5.20%
• Culpeper, VA:	$27,056	$1,060	3.92%
• Cumberland, MD-WV:	$19,831	$ 988	4.98%
• Dallas-Fort Worth-Arlington, TX:	$26,929	$1,710	6.35%
• Dalton, GA:	$18,546	$1,056	5.69%
• Danville, IL:	$19,279	$ 933	4.84%
• Danville, KY:	$19,243	$1,436	7.46%
• Danville, VA:	$19,670	$1,010	5.14%
• Daphne-Fairhope-Foley, AL:	$25,827	$1,402	5.43%
• Davenport-Moline, IA-IL:	$24,394	$1,515	6.21%
• Dayton, OH:	$24,675	$1,798	7.29%
• Decatur, AL:	$21,628	$ 926	4.28%
• Decatur, IL:	$23,747	$1,555	6.55%
• Decatur, IN:	$18,634	$ 718	3.85%
• Defiance, OH:	$21,973	$1,340	6.10%
• Del Rio, TX:	$15,484	$1,290	8.33%
• Deltona-Daytona Beach, FL:	$23,173	$1,905	8.22%
• Deming, NM:	$13,885	$1,157	8.33%
• Denver-Aurora-Broomfield, CO:	$29,944	$1,825	6.10%
• DeRidder, LA:	$20,403	$ 499	2.44%
• Des Moines-West Des Moines, IA:	$28,009	$1,374	4.91%
• Detroit-Warren-Livonia, MI:	$26,226	$1,471	5.61%
• Dickinson, ND:	$22,532	$1,704	7.56%
• Dillon, SC:	$14,989	$ 771	5.14%
• Dixon, IL:	$22,705	$1,025	4.51%
• Dodge City, KS:	$17,663	$1,011	5.72%
• Dothan, AL:	$20,855	$1,312	6.29%
• Douglas, GA:	$16,239	$1,642	10.11%

• Dover, DE:	$22,834	$ 785	3.44%
• Dublin, GA:	$18,613	$1,113	5.98%
• DuBois, PA:	$18,665	$ 969	5.19%
• Dubuque, IA:	$23,665	$1,417	5.99%
• Duluth, MN-WI:	$22,610	$1,440	6.37%
• Dumas, TX:	$17,496	$ 728	4.16%
• Duncan, OK:	$21,449	$1,145	5.34%
• Dunn, NC:	$19,002	$ 574	3.02%
• Durango, CO:	$29,022	$1,891	6.52%
• Durant, OK:	$17,558	$ 775	4.41%
• Durham-Chapel Hill, NC:	$26,968	$1,713	6.35%
• Dyersburg, TN:	$18,791	$1,122	5.97%
• Eagle Pass, TX:	$11,332	$ 592	5.22%
• East Liverpool-Salem, OH:	$19,074	$ 707	3.71%
• East Stroudsburg, PA:	$23,896	$1,241	5.19%
• Easton, MD:	$36,327	$2,617	7.20%
• Eau Claire, WI:	$22,481	$1,250	5.56%
• Edwards, CO:	$32,710	$4,016	12.28%
• Effingham, IL:	$21,919	$2,400	10.95%
• El Campo, TX:	$19,173	$ 953	4.97%
• El Centro, CA:	$14,978	$ 969	6.47%
• El Dorado, AR:	$19,888	$ 860	4.32%
• El Paso, TX:	$15,671	$1,330	8.49%
• Elizabeth City, NC:	$20,082	$1,352	6.73%
• Elizabethtown, KY:	$22,175	$1,579	7.12%
• Elk City, OK:	$21,226	$1,149	5.41%
• Elkhart-Goshen, IN:	$21,538	$1,198	5.56%
• Elko, NV:	$23,527	$ 941	4.00%
• Ellensburg, WA:	$22,451	$1,608	7.16%
• Elmira, NY:	$21,702	$1,431	6.59%
• Emporia, KS:	$17,928	$ 904	5.04%
• Enid, OK:	$21,371	$1,207	5.65%
• Enterprise-Ozark, AL:	$21,254	$ 836	3.93%
• Erie, PA:	$21,145	$1,413	6.68%
• Escanaba, MI:	$21,752	$1,634	7.51%
• Espanola, NM:	$19,575	$1,239	6.33%
• Eufaula, AL-GA:	$15,979	$ 650	4.07%
• Eugene-Springfield, OR:	$22,970	$1,566	6.82%
• Eureka-Arcata-Fortuna, CA:	$21,163	$1,304	6.16%
• Evanston, WY:	$23,505	$ 679	2.89%
• Evansville, IN-KY:	$23,558	$1,401	5.95%
• Fairbanks, AK:	$28,002	$1,572	5.61%
• Fairmont, MN:	$22,805	$1,249	5.48%
• Fairmont, WV:	$20,471	$ 934	4.56%

• Fallon, NV:	$23,219	$1,193	5.14%
• Fargo, ND-MN:	$25,157	$1,324	5.26%
• Faribault-Northfield, MN:	$23,344	$1,219	5.22%
• Farmington, MO:	$17,953	$1,187	6.61%
• Farmington, NM:	$18,816	$1,059	5.63%
• Fayetteville, AR-MO:	$21,430	$1,220	5.69%
• Fayetteville, NC:	$20,399	$1,260	6.18%
• Fergus Falls, MN:	$21,432	$ 792	3.70%
• Fernley, NV:	$21,659	$ 481	2.22%
• Findlay, OH:	$24,839	$1,935	7.79%
• Fitzgerald, GA:	$16,269	$ 486	2.98%
• Flagstaff, AZ:	$22,767	$2,487	10.92%
• Flint, MI:	$21,823	$1,246	5.71%
• Florence, SC:	$20,731	$1,147	5.53%
• Florence-Muscle Shoals, AL:	$21,237	$1,158	5.45%
• Fond du Lac, WI:	$23,448	$1,137	4.85%
• Forest City, NC:	$18,355	$1,332	7.26%
• Forrest City, AR:	$13,494	$ 800	5.93%
• Fort Collins-Loveland, CO:	$27,887	$1,733	6.22%
• Fort Dodge, IA:	$21,139	$1,285	6.08%
• Fort Leonard Wood, MO:	$17,825	$1,555	8.72%
• Fort Madison-Keokuk, IA-MO:	$20,945	$ 948	4.52%
• Fort Morgan, CO:	$17,752	$ 910	5.12%
• Fort Payne, AL:	$17,331	$ 935	5.39%
• Fort Polk South, LA:	$18,713	$ 917	4.90%
• Fort Smith, AR-OK:	$18,745	$1,010	5.39%
• Fort Valley, GA:	$18,602	$1,456	7.83%
• Fort Wayne, IN:	$23,736	$1,384	5.83%
• Frankfort, IN:	$20,439	$1,054	5.16%
• Frankfort, KY:	$24,499	$1,241	5.07%
• Fredericksburg, TX:	$27,497	$1,418	5.16%
• Freeport, IL:	$21,569	$1,408	6.53%
• Fremont, OH:	$22,702	$1,684	7.42%
• Fremont, NE:	$21,038	$1,372	6.52%
• Fresno, CA:	$18,692	$1,073	5.74%
• Gadsden, AL:	$19,789	$1,124	5.68%
• Gaffney, SC:	$18,247	$ 832	4.56%
• Gainesville, FL:	$22,802	$1,410	6.18%
• Gainesville, GA:	$21,148	$1,030	4.87%
• Gainesville, TX:	$22,797	$1,225	5.37%
• Galesburg, IL:	$19,751	$1,127	5.70%
• Gallup, NM:	$12,954	$1,645	12.70%
• Garden City, KS:	$18,371	$1,619	8.81%
• Gardnerville Ranchos, NV:	$32,208	$1,783	5.54%

• Georgetown, SC:	$25,501	$2,075	8.14%
• Gettysburg, PA:	$23,356	$1,042	4.46%
• Gillette, WY:	$30,041	$1,188	3.96%
• Glasgow, KY:	$19,232	$1,181	6.14%
• Danville, IL:	$19,279	$ 933	4.84%
• Glens Falls, NY:	$24,390	$1,180	4.84%
• Gloversville, NY:	$21,366	$ 636	2.98%
• Goldsboro, NC:	$20,307	$1,181	5.81%
• Granbury, TX:	$27,093	$1,004	3.71%
• Grand Forks, ND-MN:	$21,748	$1,526	7.02%
• Grand Island, NE:	$20,679	$1,155	5.58%
• Grand Junction, CO:	$24,980	$1,443	5.78%
• Grand Rapids-Wyoming, MI:	$22,910	$1,228	5.36%
• Grants, NM:	$15,373	$1,130	7.35%
• Grants Pass, OR:	$19,797	$1,335	6.75%
• Great Bend, KS:	$20,948	$1,067	5.09%
• Great Falls, MT:	$22,129	$1,638	7.40%
• Greeley, CO:	$22,711	$ 951	4.19%
• Green Bay, WI:	$24,778	$1,307	5.28%
• Greeneville, TN:	$18,928	$1,028	5.43%
• Greensboro-High Point, NC:	$23,286	$1,541	6.62%
• Greensburg, IN:	$21,717	$1,338	6.16%
• Greenville, NC:	$20,788	$1,338	6.44%
• Greenville, MS:	$15,212	$ 936	6.15%
• Greenville, OH:	$21,519	$ 738	3.43%
• Greenville-Mauldin-Easley, SC:	$23,330	$1,475	6.32%
• Greenwood, MS:	$14,008	$ 798	5.70%
• Greenwood, SC:	$19,731	$1,338	6.78%
• Grenada, MS:	$16,342	$1,286	7.87%
• Gulfport-Biloxi, MS:	$21,666	$1,156	5.33%
• Guymon, OK:	$17,650	$ 892	5.05%
• Hagerstown-Martinsburg, MD-WV:	$24,066	$1,258	5.23%
• Hammond, LA:	$18,620	$1,255	6.74%
• Hanford-Corcoran, CA:	$18,740	$ 742	3.96%
• Hannibal, MO:	$20,080	$ 866	4.31%
• Harriman, TN:	$22,736	$ 616	2.71%
• Harrisburg, IL:	$18,200	$ 850	4.67%
• Harrisburg-Carlisle, PA:	$27,331	$1,484	5.43%
• Harrison, AR:	$18,769	$ 866	4.61%
• Harrisonburg, VA:	$20,759	$1,451	6.99%
• Hartford-West Hartford, CT:	$32,373	$1,667	5.15%
• Hastings, NE:	$20,979	$1,107	5.28%
• Hattiesburg, MS:	$19,670	$1,826	9.28%
• Havre, MT:	$20,137	$1,140	5.66%

• Hays, KS:	$23,433	$2,222	9.48%
• Heber, UT:	$24,659	$ 771	3.13%
• Helena, MT:	$24,261	$1,299	5.35%
• Helena-West Helena, AR:	$14,657	$ 505	3.45%
• Henderson, NC:	$17,844	$1,563	8.76%
• Hereford, TX:	$15,364	$ 928	6.04%
• Hickory-Lenoir-Morganton, NC:	$19,715	$1,153	5.85%
• Hilo, HI:	$25,392	$1,634	6.43%
• Hilton Head Island-Beaufort, SC:	$28,491	$2,273	7.98%
• Hinesville-Fort Stewart, GA:	$16,753	$1,193	7.12%
• Hobbs, NM:	$19,383	$1,261	6.51%
• Holland-Grand Haven, MI:	$23,384	$1,050	4.49%
• Homosassa Springs, FL:	$21,273	$ 973	4.57%
• Honolulu, HI:	$28,274	$2,426	8.58%
• Hood River, OR:	$21,388	$1,837	8.59%
• Hope, AR:	$16,257	$ 609	3.74%
• Hot Springs, AR:	$21,161	$1,445	6.83%
• Houghton, MI:	$17,532	$ 994	5.67%
• Houma-Bayou Cane-Thibodaux, LA:	$21,232	$1,264	5.95%
• Houston-Sugar Land-Baytown, TX:	$25,789	$1,424	5.52%
• Hudson, NY:	$28,217	$1,074	3.81%
• Humboldt, TN:	$18,143	$ 872	4.81%
• Huntingdon, PA:	$18,692	$ 441	2.36%
• Huntington, IN:	$21,077	$1,127	5.35%
• Huntington-Ashland, WV-KY-OH:	$20,010	$1,152	5.76%
• Huntsville, AL:	$26,944	$1,569	5.82%
• Huntsville, TX:	$15,935	$ 707	4.43%
• Huron, SD:	$22,048	$ 673	3.05%
• Hutchinson, KS:	$20,976	$1,255	5.98%
• Hutchinson, MN:	$24,543	$ 875	3.56%
• Idaho Falls, ID:	$21,454	$1,210	5.64%
• Indiana, PA:	$19,122	$1,425	7.45%
• Indianapolis-Carmel, IN:	$27,001	$1,773	6.57%
• Indianola, MS:	$11,662	$ 173	1.48%
• Iowa City, IA:	$26,972	$1,412	5.23%
• Iron Mountain, MI-WI:	$21,469	$1,291	6.01%
• Ithaca, NY:	$24,402	$1,902	7.79%
• Jackson, MI:	$21,402	$1,091	5.10%
• Jackson, MS:	$22,265	$1,735	7.79%
• Jackson, TN:	$21,242	$2,436	11.47%
• Jackson, WY-ID:	$37,399	$2,962	7.92%
• Jacksonville, FL:	$26,194	$1,792	6.84%
• Jacksonville, IL:	$21,510	$1,490	6.93%
• Jacksonville, NC:	$18,661	$1,304	6.99%

• Jacksonville, TX:	$16,774	$ 661	3.94%
• Jamestown, ND:	$22,605	$ 924	4.09%
• Jamestown-Dunkirk-Fredonia, NY:	$20,315	$1,022	5.03%
• Janesville, WI:	$23,412	$1,337	5.71%
• Jasper, IN:	$22,962	$1,188	5.18%
• Jefferson City, MO:	$22,769	$1,301	5.71%
• Jennings, LA:	$18,576	$1,030	5.54%
• Jesup, GA:	$18,340	$1,513	8.25%
• Johnson City, TN:	$20,673	$1,250	6.04%
• Johnstown, PA:	$19,783	$ 991	5.01%
• Jonesboro, AR:	$19,729	$1,199	6.08%
• Joplin, MO:	$19,279	$1,228	6.37%
• Juneau, AK:	$33,476	$1,394	4.16%
• Kahului-Wailuku, HI:	$27,671	$3,443	12.44%
• Kalamazoo-Portage, MI:	$22,813	$1,633	7.16%
• Kalispell, MT:	$22,411	$1,883	8.40%
• Kankakee-Bradley, IL:	$22,023	$1,294	5.87%
• Kansas City, MO-KS:	$27,498	$1,378	5.01%
• Kapaa, HI:	$27,454	$2,635	9.60%
• Kearney, NE:	$21,769	$1,253	5.75%
• Keene, NH:	$25,515	$1,458	5.71%
• Kendallville, IN:	$19,811	$ 609	3.07%
• Kennett, MO:	$16,291	$1,026	6.30%
• Kennewick-Pasco-Richland, WA:	$22,232	$1,063	4.78%
• Kerrville, TX:	$23,993	$1,248	5.20%
• Ketchikan, AK:	$29,574	$1,788	6.05%
• Key West, FL:	$31,539	$6,885	21.83%
• Kill Devil Hills, NC:	$29,354	$5,285	18.00%
• Killeen-Temple-Fort Hood, TX:	$20,536	$1,151	5.60%
• Kingsport-Bristol-Bristol, TN-VA:	$21,329	$1,320	6.19%
• Kingston, NY:	$26,929	$1,066	3.96%
• Kingsville, TX:	$16,161	$2,218	13.72%
• Kinston, NC:	$18,370	$1,319	7.18%
• Kirksville, MO:	$17,640	$1,112	6.30%
• Klamath Falls, OR:	$20,851	$1,150	5.52%
• Knoxville, TN:	$25,036	$1,928	7.70%
• Kodiak, AK:	$26,206	$1,093	4.17%
• Kokomo, IN:	$23,756	$1,489	6.27%
• La Crosse, WI-MN:	$24,142	$1,152	4.77%
• La Follette, TN:	$16,158	$ 517	3.20%
• La Grande, OR:	$20,939	$1,087	5.19%
• Laconia, NH:	$27,888	$2,062	7.39%
• Lafayette, IN:	$21,741	$1,401	6.44%
• Lafayette, LA:	$23,254	$2,051	8.82%

• LaGrange, GA:	$19,871	$1,496	7.53%
• Lake Charles, LA:	$22,051	$1,324	6.01%
• Lake City, FL:	$17,542	$1,004	5.72%
• Lake Havasu City-Kingman, AZ:	$19,720	$1,503	7.62%
• Lakeland-Winter Haven, FL:	$21,589	$1,045	4.84%
• Lamesa, TX:	$16,459	$ 739	4.49%
• Lancaster, PA:	$24,625	$1,120	4.55%
• Lancaster, SC:	$17,869	$ 547	3.06%
• Lansing-East Lansing, MI:	$24,307	$1,547	6.36%
• Laramie, WY:	$23,115	$2,110	9.13%
• Laredo, TX:	$13,283	$1,282	9.65%
• Las Cruces, NM:	$16,755	$ 940	5.61%
• Las Vegas, NM:	$17,425	$ 765	4.39%
• Las Vegas-Paradise, NV:	$25,683	$2,601	10.13%
• Laurel, MS:	$17,129	$ 945	5.52%
• Laurinburg, NC:	$16,365	$1,313	8.02%
• Lawrence, KS:	$23,454	$1,341	5.72%
• Lawrenceburg, TN:	$17,195	$1,193	6.94%
• Lawton, OK:	$19,915	$1,590	7.98%
• Lebanon, MO:	$18,448	$1,237	6.70%
• Lebanon, NH-VT:	$27,176	$1,566	5.76%
• Lebanon, PA:	$24,204	$ 794	3.28%
• Levelland, TX:	$19,916	$ 740	3.72%
• Lewisburg, PA:	$20,385	$1,613	7.91%
• Lewisburg, TN:	$19,047	$ 665	3.49%
• Lewiston, ID-WA:	$22,011	$1,170	5.31%
• Lewiston-Auburn, ME:	$22,577	$1,269	5.62%
• Lewistown, PA:	$18,062	$ 454	2.51%
• Lexington, NE:	$18,049	$ 972	5.39%
• Lexington Park, MD:	$30,507	$1,162	3.81%
• Lexington-Fayette, KY:	$26,625	$1,789	6.72%
• Liberal, KS:	$16,367	$1,158	7.07%
• Lima, OH:	$20,721	$2,034	9.82%
• Lincoln, IL:	$21,170	$ 848	4.01%
• Lincoln, NE:	$24,915	$1,346	5.40%
• Lincolnton, NC:	$22,161	$ 642	2.90%
• Little Rock, AR:	$23,973	$1,477	6.16%
• Lock Haven, PA:	$19,204	$ 961	5.01%
• Logan, UT-ID:	$17,561	$ 864	4.92%
• Logansport, IN:	$20,403	$ 953	4.67%
• London, KY:	$17,702	$ 770	4.35%
• Longview, TX:	$21,632	$1,181	5.46%
• Longview, WA:	$21,418	$1,255	5.86%
• Los Alamos, NM:	$45,416	$ 912	2.01%

• Los Angeles-Long Beach, CA:	$26,048	$1,777	6.82%
• Louisville-Jefferson Co., KY-IN:	$25,073	$1,482	5.91%
• Lubbock, TX:	$21,469	$1,292	6.02%
• Lufkin, TX:	$18,184	$1,041	5.73%
• Lumberton, NC:	$13,905	$ 968	6.96%
• Lynchburg, VA:	$22,527	$1,237	5.49%
• Macomb, IL:	$16,852	$1,702	10.10%
• Macon, GA:	$21,078	$1,349	6.40%
• Madera-Chowchilla, CA:	$17,122	$ 490	2.86%
• Madison, IN:	$20,723	$1,126	5.43%
• Madison, WI:	$29,753	$1,646	5.53%
• Madisonville, KY:	$20,910	$1,169	5.59%
• Magnolia, AR:	$19,052	$ 753	3.95%
• Malone, NY:	$20,081	$ 657	3.27%
• Manchester-Nashua, NH:	$31,017	$1,602	5.17%
• Manhattan, KS:	$20,739	$1,541	7.43%
• Manitowoc, WI:	$23,772	$ 836	3.52%
• Mankato-North Mankato, MN:	$23,606	$1,530	6.48%
• Mansfield, OH:	$20,744	$1,324	6.38%
• Marble Falls, TX:	$22,837	$ 886	3.88%
• Marinette, WI-MI:	$20,891	$ 876	4.19%
• Marion, IN:	$19,583	$1,441	7.36%
• Marion, OH:	$19,219	$ 908	4.72%
• Marion-Herrin, IL:	$21,399	$1,759	8.22%
• Marquette, MI:	$21,380	$1,177	5.51%
• Marshall, MN:	$21,510	$1,358	6.31%
• Marshall, MO:	$19,264	$ 568	2.95%
• Marshall, TX:	$20,738	$ 872	4.21%
• Marshalltown, IA:	$22,288	$ 957	4.29%
• Marshfield-Wisconsin Rapids, WI:	$23,940	$1,109	4.63%
• Martin, TN:	$17,628	$ 542	3.07%
• Martinsville, VA:	$19,252	$1,085	5.63%
• Maryville, MO:	$18,889	$1,275	6.75%
• Mason City, IA:	$23,198	$1,386	5.98%
• Mayfield, KY:	$18,834	$ 708	3.76%
• Maysville, KY:	$18,011	$1,660	9.21%
• McAlester, OK:	$19,899	$1,329	6.68%
• McAllen-Edinburg-Mission, TX:	$12,261	$ 875	7.14%
• McComb, MS:	$16,628	$ 952	5.72%
• McMinnville, TN:	$17,943	$ 706	3.93%
• McPherson, KS:	$22,553	$ 756	3.35%
• Meadville, PA:	$19,274	$1,306	6.77%
• Medford, OR:	$23,289	$1,661	7.13%
• Memphis, TN-MS-AR:	$23,040	$1,441	6.25%

• Menomonie, WI:	$21,079	$ 880	4.18%
• Merced, CA:	$16,556	$ 901	5.44%
• Meridian, MS:	$17,377	$1,088	6.26%
• Merrill, WI:	$21,753	$ 640	2.94%
• Mexico, MO:	$18,601	$ 878	4.72%
• Miami, OK:	$16,740	$ 617	3.69%
• Miami-Fort Lauderdale, FL:	$25,711	$1,781	6.93%
• Michigan City-La Porte, IN:	$21,194	$1,185	5.59%
• Middlesborough, KY:	$14,361	$1,291	8.99%
• Midland, MI:	$26,827	$1,219	4.54%
• Midland, TX:	$26,403	$1,689	6.40%
• Milledgeville, GA:	$17,417	$1,268	7.28%
• Milwaukee-Waukesha-W. Allis, WI:	$27,214	$1,482	5.45%
• Minden, LA:	$19,229	$ 553	2.88%
• Mineral Wells, TX:	$19,391	$1,084	5.59%
• Minneapolis, MN-WI:	$31,162	$1,747	5.60%
• Minot, ND:	$23,025	$1,473	6.40%
• Missoula, MT:	$21,876	$1,819	8.31%
• Mitchell, SD:	$22,161	$1,295	5.84%
• Moberly, MO:	$17,702	$ 741	4.19%
• Mobile, AL:	$20,455	$1,366	6.68%
• Modesto, CA:	$20,013	$1,453	7.26%
• Monroe, LA:	$20,137	$1,341	6.66%
• Monroe, MI:	$24,812	$1,164	4.69%
• Monroe, WI:	$24,784	$ 889	3.59%
• Montgomery, AL:	$22,721	$1,305	5.74%
• Montrose, CO:	$21,259	$ 935	4.40%
• Morehead City, NC:	$26,353	$1,861	7.06%
• Morgan City, LA:	$18,617	$ 892	4.79%
• Morgantown, WV:	$21,035	$1,344	6.39%
• Morristown, TN:	$19,268	$1,037	5.38%
• Moscow, ID:	$19,895	$1,017	5.11%
• Moses Lake, WA:	$17,484	$ 925	5.29%
• Moultrie, GA:	$16,616	$ 718	4.32%
• Mount Airy, NC:	$18,920	$1,285	6.79%
• Mount Pleasant, MI:	$18,522	$1,068	5.77%
• Mount Pleasant, TX:	$17,573	$1,213	6.90%
• Mount Sterling, KY:	$18,561	$ 775	4.17%
• Mount Vernon, IL:	$19,711	$1,213	6.15%
• Mount Vernon, OH:	$20,337	$ 864	4.25%
• Mount Vernon-Anacortes, WA:	$24,868	$1,423	5.72%
• Mountain Home, AR:	$20,137	$ 948	4.71%
• Mountain Home, ID:	$20,325	$1,041	5.12%
• Muncie, IN:	$20,367	$1,412	6.93%

• Murray, KY:	$19,825	$1,433	7.23%
• Muscatine, IA:	$23,109	$ 731	3.16%
• Muskegon-Norton Shores, MI:	$19,386	$1,125	5.80%
• Muskogee, OK:	$17,770	$1,370	7.71%
• Myrtle Beach, SC:	$23,467	$2,861	12.19%
• Nacogdoches, TX:	$17,706	$1,139	6.43%
• Napa, CA:	$31,531	$2,671	8.47%
• Naples-Marco Island, FL:	$34,711	$2,314	6.67%
• Nashville-Davidson, TN:	$26,449	$1,581	5.98%
• Natchez, MS-LA:	$16,813	$1,267	7.53%
• Natchitoches, LA:	$16,764	$1,729	10.32%
• New Bern, NC:	$22,306	$1,463	6.56%
• New Castle, IN:	$20,997	$1,029	4.90%
• New Castle, PA:	$20,724	$ 867	4.18%
• New Haven-Milford, CT:	$29,825	$1,534	5.14%
• New Iberia, LA:	$18,979	$ 734	3.87%
• New Orleans-Metairie-Kenner, LA:	$23,995	$1,922	8.01%
• New Philadelphia-Dover, OH:	$20,057	$1,024	5.11%
• New Ulm, MN:	$23,774	$ 991	4.17%
• New York, NY-NJ-PA:	$31,414	$1,679	5.34%
• Newberry, SC:	$19,747	$ 455	2.30%
• Newport, TN:	$15,970	$ 867	5.43%
• Newton, IA:	$22,602	$1,048	4.64%
• Niles-Benton Harbor, MI:	$22,201	$1,263	5.69%
• Nogales, AZ:	$16,518	$1,021	6.18%
• Norfolk, NE:	$20,153	$ 968	4.80%
• North Platte, NE:	$22,669	$1,361	6.01%
• North Port-Bradenton, FL:	$29,453	$1,785	6.06%
• North Vernon, IN:	$19,521	$ 642	3.29%
• North Wilkesboro, NC:	$18,447	$1,162	6.30%
• Norwalk, OH:	$20,732	$ 822	3.97%
• Norwich-New London, CT:	$30,898	$1,958	6.34%
• Oak Harbor, WA:	$26,881	$ 995	3.70%
• Oak Hill, WV:	$17,280	$ 600	3.47%
• Ocala, FL:	$21,279	$1,441	6.77%
• Ocean City, NJ:	$30,847	$3,375	10.94%
• Ocean Pines, MD:	$28,412	$5,480	19.29%
• Odessa, TX:	$20,120	$1,529	7.60%
• Ogden-Clearfield, UT:	$22,977	$ 875	3.81%
• Ogdensburg-Massena, NY:	$19,858	$ 864	4.35%
• Oil City, PA:	$19,703	$ 586	2.97%
• Okeechobee, FL:	$17,591	$1,288	7.32%
• Oklahoma City, OK:	$23,562	$1,430	6.07%
• Olean, NY:	$20,093	$1,000	4.98%

• Olympia, WA:	$27,940	$1,250	4.47%
• Omaha-Council Bluffs, NE-IA:	$26,379	$1,498	5.68%
• Oneonta, NY:	$21,447	$1,424	6.64%
• Ontario, OR-ID:	$17,198	$ 750	4.36%
• Opelousas-Eunice, LA:	$15,583	$ 505	3.24%
• Orangeburg, SC:	$17,030	$1,182	6.94%
• Orlando-Kissimmee-Sanford, FL:	$24,262	$2,299	9.47%
• Oshkosh-Neenah, WI:	$24,913	$1,037	4.16%
• Oskaloosa, IA:	$21,437	$ 788	3.68%
• Ottawa-Streator, IL:	$23,388	$1,363	5.83%
• Ottumwa, IA:	$20,046	$ 823	4.10%
• Owatonna, MN:	$24,367	$ 990	4.06%
• Owensboro, KY:	$21,778	$2,090	9.60%
• Owosso, MI:	$20,897	$ 876	4.19%
• Oxford, MS:	$20,954	$2,087	9.96%
• Oxnard-Thousand Oaks-Ventura, CA:	$30,325	$1,437	4.74%
• Paducah, KY-IL:	$22,472	$1,996	8.88%
• Pahrump, NV:	$21,481	$ 623	2.90%
• Palatka, FL:	$18,034	$1,043	5.78%
• Palestine, TX:	$16,516	$ 706	4.27%
• Palm Bay-Melbourne, FL:	$25,829	$1,723	6.67%
• Palm Coast, FL:	$26,086	$ 751	2.88%
• Pampa, TX:	$20,802	$ 931	4.47%
• Panama City-Lynn Haven, FL:	$24,200	$2,674	11.05%
• Paragould, AR:	$18,515	$ 747	4.03%
• Paris, TX:	$19,317	$1,467	7.60%
• Paris, TN:	$18,552	$1,013	5.46%
• Parkersburg-Marietta-Vienna, WV:	$21,491	$1,668	7.76%
• Parsons, KS:	$18,470	$ 683	3.70%
• Pascagoula, MS:	$21,098	$1,150	5.45%
• Payson, AZ:	$19,856	$1,074	5.41%
• Pecos, TX:	$13,736	$ 753	5.48%
• Pella, IA:	$22,687	$ 737	3.25%
• Pendleton-Hermiston, OR:	$19,603	$ 983	5.02%
• Pensacola-Ferry Pass-Brent, FL:	$22,651	$1,502	6.63%
• Peoria, IL:	$25,818	$1,267	4.91%
• Peru, IN:	$19,394	$ 686	3.54%
• Philadelphia, PA-NJ-DE-MD:	$29,599	$1,473	4.98%
• Phoenix Lake-Cedar Ridge, CA:	$25,990	$1,376	5.29%
• Phoenix-Mesa-Glendale, AZ:	$25,173	$1,534	6.10%
• Picayune, MS:	$18,303	$ 781	4.27%
• Pierre, SD:	$25,757	$1,372	5.33%
• Pierre Part, LA:	$19,586	$ 180	0.92%
• Pine Bluff, AR:	$17,322	$ 818	4.72%

• Pittsburg, KS:	$18,967	$1,545	8.14%
• Pittsburgh, PA:	$25,729	$1,550	6.02%
• Pittsfield, MA:	$26,690	$1,777	6.66%
• Plainview, TX:	$15,609	$1,312	8.40%
• Platteville, WI:	$20,135	$ 573	2.84%
• Plattsburgh, NY:	$22,588	$1,120	4.96%
• Plymouth, IN:	$21,891	$ 982	4.49%
• Pocatello, ID:	$20,296	$1,090	5.37%
• Point Pleasant, WV-OH:	$18,501	$ 758	4.10%
• Ponca City, OK:	$20,560	$1,180	5.74%
• Pontiac, IL:	$21,981	$ 863	3.93%
• Poplar Bluff, MO:	$18,974	$1,403	7.40%
• Port Angeles, WA:	$23,853	$1,359	5.70%
• Port St. Lucie, FL:	$26,200	$1,445	5.51%
• Portales, NM:	$15,893	$1,199	7.55%
• Portland, ME:	$28,281	$1,858	6.57%
• Portland-Vancouver, OR-WA:	$27,349	$1,687	6.17%
• Portsmouth, OH:	$17,589	$1,260	7.17%
• Pottsville, PA:	$21,200	$ 733	3.46%
• Poughkeepsie-Newburgh, NY:	$28,186	$1,136	4.03%
• Prescott, AZ:	$23,869	$1,224	5.13%
• Price, UT:	$19,458	$ 835	4.29%
• Prineville, OR:	$20,127	$ 904	4.49%
• Providence, RI-MA:	$26,749	$1,799	6.73%
• Provo-Orem, UT:	$18,542	$ 640	3.45%
• Pueblo, CO:	$20,337	$1,307	6.43%
• Pullman, WA:	$19,391	$ 895	4.61%
• Punta Gorda, FL:	$27,246	$1,310	4.81%
• Quincy, IL-MO:	$21,207	$1,277	6.02%
• Racine, WI:	$24,727	$1,126	4.55%
• Raleigh-Cary, NC:	$28,617	$1,327	4.64%
• Rapid City, SD:	$23,278	$1,634	7.02%
• Raymondville, TX:	$10,213	$ 576	5.64%
• Reading, PA:	$24,808	$ 977	3.94%
• Red Bluff, CA:	$18,799	$1,388	7.38%
• Red Wing, MN:	$26,548	$1,345	5.07%
• Redding, CA:	$21,775	$1,397	6.41%
• Reno-Sparks, NV:	$27,474	$1,773	6.45%
• Rexburg, ID:	$14,302	$ 525	3.67%
• Richmond, IN:	$20,332	$1,874	9.22%
• Richmond, VA:	$28,548	$1,410	4.94%
• Richmond-Berea, KY:	$19,302	$1,086	5.63%
• Rio Grande City-Roma, TX:	$ 9,249	$ 660	7.14%
• Riverside, CA:	$21,253	$1,320	6.21%

• Riverton, WY:	$22,075	$ 934	4.23%
• Roanoke, VA:	$25,821	$1,712	6.63%
• Roanoke Rapids, NC:	$16,409	$ 912	5.56%
• Rochelle, IL:	$24,350	$ 573	2.35%
• Rochester, MN:	$29,609	$1,306	4.41%
• Rochester, NY:	$25,321	$1,294	5.11%
• Rock Springs, WY:	$28,385	$1,373	4.84%
• Rockford, IL:	$23,020	$1,328	5.77%
• Rockingham, NC:	$15,865	$ 903	5.69%
• Rockland, ME:	$25,246	$1,617	6.41%
• Rocky Mount, NC:	$19,743	$1,355	6.86%
• Rolla, MO:	$20,080	$1,685	8.39%
• Rome, GA:	$20,054	$2,009	10.02%
• Roseburg, OR:	$20,023	$1,163	5.81%
• Roswell, NM:	$18,109	$ 926	5.11%
• Ruidoso, NM:	$25,280	$2,227	8.81%
• Russellville, AR:	$18,124	$ 863	4.76%
• Ruston, LA:	$17,839	$1,065	5.97%
• Rutland, VT:	$23,508	$1,472	6.26%
• Sacramento-Arden, CA:	$27,630	$1,590	5.75%
• Safford, AZ:	$16,693	$ 754	4.52%
• Saginaw-Saginaw Township N., MI:	$20,967	$1,561	7.44%
• Salem, OR:	$20,949	$1,301	6.21%
• Salina, KS:	$21,483	$1,217	5.67%
• Salinas, CA:	$23,594	$1,670	7.08%
• Salisbury, MD:	$23,157	$1,319	5.70%
• Salisbury, NC:	$20,592	$ 997	4.84%
• Salt Lake City, UT:	$24,159	$1,310	5.42%
• San Angelo, TX:	$20,946	$1,346	6.43%
• San Antonio-New Braunfels, TX:	$21,912	$1,666	7.60%
• San Diego-Carlsbad, CA:	$28,675	$2,087	7.28%
• San Francisco-Oakland, CA:	$37,278	$2,244	6.02%
• San Jose-Sunnyvale, CA:	$37,136	$1,777	4.78%
• San Luis Obispo-Paso Robles, CA:	$28,303	$1,761	6.22%
• Sandusky, OH:	$24,090	$2,050	8.51%
• Sanford, NC:	$20,930	$1,210	5.78%
• Santa Barbara, CA:	$27,748	$2,038	7.34%
• Santa Cruz-Watsonville, CA:	$31,442	$1,873	5.96%
• Santa Fe, NM:	$29,188	$1,958	6.71%
• Santa Rosa-Petaluma, CA:	$30,785	$1,541	5.00%
• Sault Ste. Marie, MI:	$18,262	$ 914	5.01%
• Savannah, GA:	$24,433	$1,979	8.10%
• Sayre, PA:	$20,192	$ 750	3.71%
• Scottsbluff, NE:	$20,606	$1,102	5.35%

• Scottsboro, AL:	$19,068	$ 742	3.89%
• Scottsburg, IN:	$18,801	$ 918	4.88%
• Scranton--Wilkes-Barre, PA:	$22,565	$1,596	7.07%
• Seaford, DE:	$25,125	$1,901	7.57%
• Searcy, AR:	$18,628	$1,307	7.02%
• Seattle-Tacoma-Bellevue, WA:	$31,935	$1,689	5.29%
• Sebastian-Vero Beach, FL:	$31,049	$1,520	4.89%
• Sebring, FL:	$18,336	$ 661	3.61%
• Sedalia, MO:	$18,467	$1,411	7.64%
• Selinsgrove, PA:	$20,326	$1,562	7.69%
• Selma, AL:	$16,218	$ 742	4.57%
• Seneca, SC:	$22,006	$1,067	4.85%
• Seneca Falls, NY:	$21,251	$ 920	4.33%
• Sevierville, TN:	$20,829	$4,404	21.14%
• Seymour, IN:	$21,233	$1,054	4.96%
• Shawnee, OK:	$18,354	$1,477	8.05%
• Sheboygan, WI:	$24,949	$ 971	3.89%
• Shelby, NC:	$18,817	$ 924	4.91%
• Shelbyville, TN:	$17,665	$ 611	3.46%
• Shelton, WA:	$22,386	$ 809	3.61%
• Sheridan, WY:	$26,889	$1,211	4.50%
• Sherman-Denison, TX:	$21,932	$1,373	6.26%
• Show Low, AZ:	$15,507	$ 979	6.31%
• Shreveport-Bossier City, LA:	$21,220	$1,376	6.48%
• Sidney, OH:	$23,266	$1,179	5.07%
• Sierra Vista-Douglas, AZ:	$21,195	$1,189	5.61%
• Sikeston, MO:	$18,437	$1,409	7.64%
• Silver City, NM:	$18,761	$ 649	3.46%
• Silverthorne, CO:	$34,064	$4,857	14.26%
• Sioux City, IA-NE-SD:	$21,690	$1,257	5.80%
• Sioux Falls, SD:	$25,009	$1,663	6.65%
• Snyder, TX:	$20,399	$ 984	4.82%
• Somerset, KY:	$18,110	$1,205	6.65%
• Somerset, PA:	$18,454	$1,141	6.18%
• South Bend-Mishawaka, IN-MI:	$21,927	$1,491	6.80%
• Southern Pines-Pinehurst, NC:	$25,680	$1,369	5.33%
• Paris, TX:	$19,317	$1,467	7.60%
• Spartanburg, SC:	$21,062	$1,696	8.05%
• Spearfish, SD:	$21,742	$2,103	9.67%
• Spencer, IA:	$23,015	$1,013	4.40%
• Spirit Lake, IA:	$26,889	$1,240	4.61%
• Spokane, WA:	$23,317	$1,341	5.75%
• Springfield, IL:	$27,058	$2,373	8.77%
• Springfield, MA:	$24,328	$1,378	5.66%

- Springfield, MO: $21,931 $1,502 6.85%
- Springfield, OH: $21,695 $1,467 6.76%
- St. Cloud, MN: $23,496 $1,450 6.17%
- St. George, UT: $20,378 $1,320 6.48%
- St. Joseph, MO-KS: $20,466 $1,107 5.41%
- St. Louis, MO-IL: $26,708 $1,704 6.38%
- St. Marys, GA: $19,975 $1,136 5.69%
- St. Marys, PA: $21,532 $ 814 3.78%
- Starkville, MS: $17,843 $1,466 8.22%
- State College, PA: $22,191 $1,604 7.23%
- Statesboro, GA: $18,205 $1,494 8.21%
- Statesville-Mooresville, NC: $24,302 $1,655 6.81%
- Staunton-Waynesboro, VA: $23,612 $1,117 4.73%
- Stephenville, TX: $19,600 $2,047 10.44%
- Sterling, CO: $19,462 $ 943 4.85%
- Sterling, IL: $21,876 $ 753 3.44%
- Steubenville-Weirton, OH-WV: $20,618 $ 944 4.58%
- Stevens Point, WI: $24,642 $1,414 5.74%
- Stillwater, OK: $18,754 $1,541 8.22%
- Stockton, CA: $20,978 $1,205 5.74%
- Storm Lake, IA: $19,366 $ 709 3.66%
- Sturgis, MI: $19,999 $ 603 3.01%
- Sulphur Springs, TX: $20,214 $ 616 3.05%
- Summerville, GA: $15,783 $ 361 2.29%
- Sumter, SC: $18,846 $ 996 5.28%
- Sunbury, PA: $19,962 $ 631 3.16%
- Susanville, CA: $18,463 $ 545 2.95%
- Sweetwater, TX: $18,116 $1,537 8.48%
- Syracuse, NY: $24,848 $1,541 6.20%
- Tahlequah, OK: $15,846 $ 680 4.29%
- Talladega-Sylacauga, AL: $18,638 $ 786 4.22%
- Tallahassee, FL: $23,660 $1,504 6.36%
- Tallulah, LA: $12,724 $ 160 1.26%
- Tampa-St. Petersburg, FL: $25,348 $1,662 6.56%
- Taos, NM: $23,042 $1,928 8.37%
- Taylorville, IL: $20,642 $ 755 3.66%
- Terre Haute, IN: $19,838 $1,564 7.88%
- Texarkana, AR: $20,124 $1,754 8.72%
- The Dalles, OR: $20,112 $1,500 7.46%
- The Villages, FL: $22,394 $1,284 5.74%
- Thomaston, GA: $17,832 $1,011 5.67%
- Thomasville, GA: $19,506 $1,103 5.66%
- Thomasville-Lexington, NC: $20,723 $ 924 4.46%
- Tiffin, OH: $20,024 $ 714 3.56%

• Tifton, GA:	$19,164	$1,808	9.43%
• Toccoa, GA:	$18,018	$ 920	5.11%
• Toledo, OH:	$23,619	$1,552	6.57%
• Topeka, KS:	$23,722	$1,477	6.22%
• Torrington, CT:	$33,558	$1,011	3.01%
• Traverse City, MI:	$24,574	$1,621	6.60%
• Trenton-Ewing, NJ:	$33,767	$1,776	5.26%
• Troy, AL:	$17,334	$1,674	9.65%
• Truckee-Grass Valley, CA:	$30,036	$1,327	4.42%
• Tucson, AZ:	$23,427	$1,467	6.26%
• Tullahoma, TN:	$20,667	$ 653	3.16%
• Tulsa, OK:	$23,684	$1,329	5.61%
• Tupelo, MS:	$19,514	$1,114	5.71%
• Tuscaloosa, AL:	$21,482	$1,296	6.03%
• Tuskegee, AL:	$15,884	$1,417	8.92%
• Twin Falls, ID:	$19,139	$1,124	5.87%
• Tyler, TX:	$22,144	$1,605	7.25%
• Ukiah, CA:	$22,819	$1,295	5.68%
• Union, SC:	$18,340	$ 570	3.11%
• Union City, TN-KY:	$19,328	$1,537	7.95%
• Urbana, OH:	$21,689	$ 738	3.40%
• Utica-Rome, NY:	$22,140	$1,004	4.53%
• Uvalde, TX:	$15,499	$1,045	6.74%
• Valdosta, GA:	$19,452	$2,452	12.61%
• Vallejo-Fairfield, CA:	$26,903	$1,574	5.85%
• Valley, AL:	$17,326	$ 710	4.10%
• Van Wert, OH:	$21,283	$ 481	2.26%
• Vermillion, SD:	$18,051	$ 956	5.30%
• Vernal, UT:	$21,032	$ 721	3.43%
• Vernon, TX:	$19,441	$ 899	4.63%
• Vicksburg, MS:	$20,308	$1,030	5.07%
• Victoria, TX:	$21,494	$1,112	5.17%
• Vidalia, GA:	$17,283	$1,077	6.23%
• Vincennes, IN:	$19,763	$1,404	7.10%
• Vineland-Millville-Bridgeton, NJ:	$20,698	$ 960	4.64%
• Virginia Beach, VA-NC:	$26,040	$1,651	6.34%
• Visalia-Porterville, CA:	$16,515	$ 701	4.25%
• Wabash, IN:	$20,817	$ 714	3.43%
• Waco, TX:	$19,606	$1,462	7.46%
• Wahpeton, ND-MN:	$21,427	$1,199	5.60%
• Walla Walla, WA:	$20,437	$ 890	4.36%
• Walterboro, SC:	$17,595	$ 701	3.99%
• Wapakoneta, OH:	$23,743	$ 919	3.87%
• Warner Robins, GA:	$23,649	$1,528	6.46%

• Warren, PA:	$20,967	$1,107	5.28%
• Warrensburg, MO:	$20,087	$ 858	4.27%
• Warsaw, IN:	$23,148	$1,158	5.00%
• Washington, DC-VA-MD-WV:	$39,272	$2,059	5.24%
• Washington, IN:	$19,030	$ 501	2.63%
• Washington, NC:	$20,866	$1,013	4.86%
• Washington Court House, OH:	$21,140	$1,322	6.25%
• Waterloo-Cedar Falls, IA:	$22,819	$1,372	6.01%
• Watertown, SD:	$21,502	$1,371	6.38%
• Watertown-Fort Atkinson, WI:	$24,531	$1,186	4.83%
• Watertown-Fort Drum, NY:	$20,556	$1,146	5.57%
• Wauchula, FL:	$14,267	$ 431	3.02%
• Wausau, WI:	$25,198	$1,273	5.05%
• Waycross, GA:	$17,583	$1,093	6.22%
• Weatherford, OK:	$20,025	$1,069	5.34%
• Wenatchee-East Wenatchee, WA:	$22,035	$ 983	4.46%
• West Plains, MO:	$17,025	$1,120	6.58%
• West Point, MS:	$17,229	$ 629	3.65%
• Wheeling, WV-OH:	$20,355	$1,435	7.05%
• Whitewater, WI:	$24,193	$1,283	5.30%
• Wichita, KS:	$23,733	$1,367	5.76%
• Wichita Falls, TX:	$21,003	$1,478	7.04%
• Williamsport, PA:	$21,008	$1,034	4.92%
• Willimantic, CT:	$25,115	$1,061	4.22%
• Williston, ND:	$25,774	$1,012	3.93%
• Willmar, MN:	$24,030	$ 986	4.10%
• Wilmington, NC:	$25,611	$1,725	6.74%
• Wilmington, OH:	$21,659	$ 918	4.24%
• Wilson, NC:	$20,167	$1,357	6.73%
• Winchester, VA-WV:	$25,370	$1,544	6.09%
• Winfield, KS:	$20,003	$ 787	3.93%
• Winona, MN:	$21,402	$1,082	5.06%
• Winston-Salem, NC:	$24,269	$1,424	5.87%
• Woodward, OK:	$22,024	$1,229	5.58%
• Wooster, OH:	$21,165	$ 942	4.45%
• Worcester, MA:	$29,419	$1,661	5.65%
• Worthington, MN:	$20,127	$ 952	4.73%
• Yakima, WA:	$18,199	$ 881	4.84%
• Yankton, SD:	$21,420	$1,515	7.07%
• Yazoo City, MS:	$13,123	$ 101	0.77%
• York-Hanover, PA:	$25,938	$1,017	3.92%
• Youngstown-Warren, OH-PA:	$21,489	$1,393	6.48%
• Yuba City, CA:	$20,196	$ 816	4.04%
• Yuma, AZ:	$18,094	$1,024	5.66%
• Zanesville, OH:	$19,749	$1,820	9.22%

12

MARKET GROWTH POTENTIAL

12.1 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 10.1 of this handbook).

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

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

12.2 Growth Potential for MSAs

The 2012 Restaurant Growth Index for each MSA and µSA is as follows:

1.	Corbin, KY:	692.39
2.	Key West, FL:	670.31
3.	Sevierville, TN:	540.00
4.	Valdosta, GA:	341.03
5.	Gallup, NM:	332.15
6.	Ocean Pines, MD:	316.50
7.	Kahului-Wailuku, HI:	303.43
8.	Crestview, FL:	292.23
9.	Kingsville, TX:	287.00
10.	Kill Devil Hills, NC:	281.60
11.	Cape Girardeau-Jackson, MO-IL:	273.69
12.	Jackson, TN:	268.40
13.	Tuskegee, AL:	265.12
14.	Edwards, CO:	264.13
15.	Las Vegas-Paradise, NV:	255.67
16.	Owensboro, KY:	249.21
17.	Silverthorne, CO:	249.12
18.	Douglas, GA:	249.09

19.	Flagstaff, AZ:	236.95
20.	Napa, CA:	235.74
21.	Rome, GA:	234.34
22.	Troy, AL:	233.20
23.	Effingham, IL:	229.93
24.	Kapaa, HI:	229.57
25.	Orlando-Kissimmee-Sanford, FL:	228.97
26.	Garden City, KS:	227.64
27.	Lima, OH:	225.69
28.	Ocean City, NJ:	215.89
29.	Baraboo, WI:	214.99
30.	Atlantic City-Hammonton, NJ:	212.80
31.	Panama City-Lynn Haven, FL:	210.28
32.	Natchitoches, LA:	209.42
33.	Maysville, KY:	202.35
34.	Coldwater, MI:	199.55
35.	Barnstable Town, MA:	196.60
36.	Honolulu, HI:	193.94
37.	Boone, NC:	193.69
38.	Tifton, GA:	192.11
39.	Brunswick, GA:	191.70
40.	Zanesville, OH:	189.24
41.	Stephenville, TX:	187.29
42.	Henderson, NC:	186.49
43.	Shawnee, OK:	184.18
44.	Columbus, MS:	182.73
45.	Hattiesburg, MS:	181.95
46.	Laramie, WY:	180.51
47.	Cordele, GA:	179.22
48.	Plainview, TX:	178.55
49.	Columbus, GA-AL:	178.50
50.	Oxford, MS:	177.40
51.	Texarkana, AR:	175.43
52.	Macomb, IL:	175.30
53.	Myrtle Beach, SC:	174.85
54.	Cheyenne, WY:	174.68
55.	Lewisburg, PA:	174.43
56.	Springfield, IL:	172.43
57.	Burlington, NC:	171.04
58.	Hays, KS:	170.78
59.	Deltona-Daytona Beach, FL:	170.47
60.	Abilene, TX:	169.47
61.	Danville, KY:	169.40
62.	Jesup, GA:	168.30

63.	Jacksonville, NC:	167.27
64.	Indiana, PA:	167.20
65.	Bishop, CA:	166.73
66.	Richmond, IN:	166.70
67.	Paris, TX:	166.01
68.	Astoria, OR:	164.88
69.	Knoxville, TN:	164.56
70.	Lafayette, LA:	163.76
71.	Charleston, SC:	163.22
72.	Jackson, MS:	162.24
73.	Union City, TN-KY:	161.54
74.	Spartanburg, SC:	161.11
75.	Fort Valley, GA:	160.44
76.	Starkville, MS:	158.31
77.	Cookeville, TN:	158.14
78.	San Diego-Carlsbad, CA:	158.11
79.	Selinsgrove, PA:	157.73
80.	Laredo, TX:	157.44
81.	Paducah, KY-IL:	157.22
82.	Laurinburg, NC:	156.74
83.	Jackson, WY-ID:	156.48
84.	Rolla, MO:	156.38
85.	Spearfish, SD:	155.64
86.	Escanaba, MI:	155.56
87.	Cape Coral-Fort Myers, FL:	155.02
88.	Marion, IN:	154.56
89.	Bay City, MI:	153.41
90.	Sikeston, MO:	152.62
91.	Lawton, OK:	152.08
92.	Fort Leonard Wood, MO:	151.57
93.	Bowling Green, KY:	150.98
94.	Stillwater, OK:	150.69
95.	Hilton Head Island-Beaufort, SC:	150.55
96.	Charlottesville, VA:	150.26
97.	Portales, NM:	149.76
98.	Cleveland, MS:	149.44
99.	Findlay, OH:	149.38
100.	Dayton, OH:	149.18
101.	Manhattan, KS:	148.73
102.	Marion-Herrin, IL:	148.53
103.	Elizabethtown, KY:	148.18
104.	Middlesborough, KY:	147.49
105.	Columbus, OH:	145.69
106.	Saginaw-Saginaw Township, MI:	145.60

107.	Albertville, AL:	144.93
108.	Sandusky, OH:	144.11
109.	Grants, NM:	143.78
110.	Albuquerque, NM:	143.68
111.	Calhoun, GA:	142.71
112.	Santa Barbara, CA:	142.56
113.	Deming, NM:	141.83
114.	Ithaca, NY:	141.46
115.	Anchorage, AK:	141.25
116.	Forest City, NC:	141.02
117.	Del Rio, TX:	140.74
118.	Tyler, TX:	140.15
119.	Fremont, OH:	140.10
120.	El Paso, TX:	140.09
121.	Chattanooga, TN-GA:	139.70
122.	Sedalia, MO:	139.61
123.	San Antonio-New Braunfels, TX:	139.18
124.	North Wilkesboro, NC:	139.03
125.	Lawrenceburg, TN:	138.52
126.	Terre Haute, IN:	137.91
127.	Indianapolis-Carmel, IN:	137.79
128.	Orangeburg, SC:	137.74
129.	Easton, MD:	137.38
130.	Naples-Marco Island, FL:	137.02
131.	Modesto, CA:	136.86
132.	Ocala, FL:	136.46
133.	Savannah, GA:	136.23
134.	Miami-Fort Lauderdale, FL:	135.83
135.	Pittsburg, KS:	135.33
136.	Georgetown, SC:	134.74
137.	Corpus Christi, TX:	134.54
138.	Minneapolis, MN-WI:	134.51
139.	Muskogee, OK:	134.42
140.	Parkersburg-Marietta-Vienna, WV:	134.24
141.	Kalamazoo-Portage, MI:	133.92
142.	Poplar Bluff, MO:	133.75
143.	Atlanta-Sandy Springs, GA:	133.68
144.	Cambridge, OH:	133.59
145.	Statesville-Mooresville, NC:	133.51
146.	Lexington-Fayette, KY:	132.99
147.	Espanola, NM:	132.66
148.	Elmira, NY:	132.52
149.	Bloomington, IN:	132.20
150.	Palm Bay-Melbourne, FL:	132.03

151.	Missoula, MT:	131.96
152.	Muncie, IN:	131.17
153.	Sweetwater, TX:	130.95
154.	Chicago, IL-IN-WI:	130.85
155.	Sioux Falls, SD:	130.00
156.	Durham-Chapel Hill, NC:	129.95
157.	New Orleans-Metairie-Kenner, LA:	129.86
158.	Wichita Falls, TX:	129.46
159.	Okeechobee, FL:	129.02
160.	Boston-Cambridge-Quincy, MA-NH:	128.70
161.	Bloomsburg-Berwick, PA:	128.65
162.	Jacksonville, FL:	128.58
163.	Phoenix-Mesa-Glendale, AZ:	128.40
164.	Bozeman, MT:	128.11
165.	Pensacola-Ferry Pass-Brent, FL:	128.06
166.	Campbellsville, KY:	128.04
167.	Statesboro, GA:	127.99
168.	Alice, TX:	127.84
169.	Searcy, AR:	127.83
170.	State College, PA:	127.80
171.	Greenwood, SC:	127.57
172.	McAlester, OK:	127.27
173.	Springfield, OH:	127.06
174.	Harrisonburg, VA:	126.95
175.	Blacksburg, VA:	126.76
176.	Tucson, AZ:	126.53
177.	Billings, MT:	126.49
178.	Roanoke, VA:	126.10
179.	Charlotte-Gastonia, NC-SC:	125.96
180.	St. Louis, MO-IL:	125.87
181.	Odessa, TX:	125.77
182.	Dallas-Fort Worth-Arlington, TX:	125.61
183.	Kalispell, MT:	125.25
184.	Laconia, NH:	125.01
185.	Red Bluff, CA:	124.73
186.	College Station-Bryan, TX:	124.67
187.	St. George, UT:	124.07
188.	Salinas, CA:	123.70
189.	Fort Dodge, IA:	123.27
190.	Denver-Aurora-Broomfield, CO:	122.96
191.	Kinston, NC:	122.93
192.	Waco, TX:	122.88
193.	Washington, DC-VA-MD-WV:	122.85
194.	Los Angeles-Long Beach, CA:	122.64

195.	Casper, WY:	122.51
196.	Elizabeth City, NC:	122.36
197.	Mount Vernon, IL:	121.37
198.	Tampa-St. Petersburg, FL:	121.31
199.	Mobile, AL:	121.05
200.	Mount Pleasant, TX:	120.75
201.	Lumberton, NC:	120.69
202.	Ponca City, OK:	120.54
203.	Branson, MO:	120.50
204.	Rocky Mount, NC:	120.05
205.	South Bend-Mishawaka, IN-MI:	120.02
206.	Greensboro-High Point, NC:	119.51
207.	Santa Fe, NM:	119.21
208.	Reno-Sparks, NV:	119.15
209.	The Villages, FL:	119.09
210.	Meadville, PA:	118.90
211.	Hood River, OR:	118.83
212.	Providence, RI-MA:	118.72
213.	Baltimore-Towson, MD:	118.14
214.	Murray, KY:	118.08
215.	Kokomo, IN:	117.96
216.	Lake Havasu City-Kingman, AZ:	117.68
217.	New Bern, NC:	117.40
218.	Ruidoso, NM:	117.35
219.	Grand Forks, ND-MN:	117.22
220.	Midland, TX:	116.95
221.	Beckley, WV:	116.66
222.	Hinesville-Fort Stewart, GA:	116.57
223.	Seaford, DE:	116.23
224.	Springfield, MO:	116.12
225.	Lansing-East Lansing, MI:	115.92
226.	Rapid City, SD:	115.90
227.	Grenada, MS:	115.72
228.	North Port-Bradenton, FL:	115.69
229.	Boulder, CO:	115.60
230.	Kingsport-Bristol-Bristol, TN-VA:	115.57
231.	Clovis, NM:	115.01
232.	San Francisco-Oakland, CA:	114.95
233.	Albany, GA:	114.73
234.	Bloomington-Normal, IL:	114.65
235.	Cincinnati-Middletown, OH-KY-IN:	114.50
236.	Ruston, LA:	113.93
237.	Memphis, TN-MS-AR:	113.75
238.	Norwich-New London, CT:	113.72

239.	Wilson, NC:	113.71
240.	Portsmouth, OH:	113.64
241.	Cullman, AL:	113.57
242.	Virginia Beach, VA-NC:	113.48
243.	Asheville, NC:	113.01
244.	Austin-Round Rock-San Marcos, TX:	112.94
245.	Clarksburg, WV:	112.73
246.	Great Falls, MT:	112.44
247.	Mankato-North Mankato, MN:	111.95
248.	Brookhaven, MS:	111.83
249.	Athens, TN:	111.83
250.	Riverside, CA:	111.82
251.	Warner Robins, GA:	111.78
252.	LaGrange, GA:	111.61
253.	Bakersfield-Delano, CA:	111.59
254.	Salisbury, MD:	110.63
255.	Vincennes, IN:	110.51
256.	Bastrop, LA:	110.42
257.	Topeka, KS:	110.37
258.	Fort Collins-Loveland, CO:	110.23
259.	Vallejo-Fairfield, CA:	110.10
260.	Huntsville, AL:	109.90
261.	Bartlesville, OK:	109.85
262.	Greenville, NC:	109.80
263.	Madisonville, KY:	109.78
264.	Farmington, MO:	109.53
265.	Canton-Massillon, OH:	109.24
266.	Chillicothe, OH:	109.22
267.	Decatur, IL:	109.12
268.	Arkadelphia, AR:	109.07
269.	Tallahassee, FL:	109.06
270.	Batesville, AR:	108.99
271.	Defiance, OH:	108.93
272.	Pueblo, CO:	108.80
273.	St. Cloud, MN:	108.67
274.	Somerset, KY:	108.50
275.	Martinsville, VA:	108.47
276.	Lafayette, IN:	108.43
277.	Columbia, TN:	108.32
278.	Athens-Clarke County, GA:	107.72
279.	Jacksonville, IL:	107.69
280.	Lebanon, MO:	107.40
281.	Medford, OR:	107.38
282.	Amarillo, TX:	107.10

283.	Anderson, IN:	106.90
284.	Augusta-Richmond County, GA-SC:	106.35
285.	Milledgeville, GA:	106.34
286.	Colorado Springs, CO:	105.92
287.	Wilmington, NC:	105.90
288.	Washington Court House, OH:	105.88
289.	El Centro, CA:	105.79
290.	Maryville, MO:	105.60
291.	Bluefield, WV-VA:	105.45
292.	Goldsboro, NC:	105.38
293.	Akron, OH:	105.32
294.	Little Rock, AR:	105.13
295.	Sanford, NC:	105.11
296.	Nashville-Davidson, TN:	104.32
297.	Berlin, NH-VT:	104.26
298.	Taos, NM:	104.21
299.	Toledo, OH:	104.18
300.	Louisville-Jefferson Co., KY-IN:	104.13
301.	Cleveland-Elyria-Mentor, OH:	103.93
302.	Santa Cruz-Watsonville, CA:	103.74
303.	Rockland, ME:	103.56
304.	Sacramento--Arden, CA:	103.42
305.	Carson City, NV:	103.31
306.	Portland-Vancouver, OR-WA:	103.26
307.	Yuma, AZ:	103.10
308.	Grand Junction, CO:	102.99
309.	Winston-Salem, NC:	102.93
310.	Alma, MI:	102.91
311.	Anniston-Oxford, AL:	102.88
312.	Greenville-Mauldin-Easley, SC:	102.64
313.	Port St. Lucie, FL:	102.42
314.	Erie, PA:	102.36
315.	Worcester, MA:	102.23
316.	Rockford, IL:	102.08
317.	Monroe, LA:	101.78
318.	Buffalo-Niagara Falls, NY:	101.76
319.	Sherman-Denison, TX:	101.56
320.	Auburn, IN:	101.22
321.	Americus, GA:	101.08
322.	Tuscaloosa, AL:	101.07
323.	Winchester, VA-WV:	100.60
324.	Columbus, IN:	100.44
325.	Eugene-Springfield, OR:	100.39
326.	The Dalles, OR:	100.35

327.	Hickory-Lenoir-Morganton, NC:	100.32
328.	Richmond-Berea, KY:	99.61
329.	Meridian, MS:	99.52
330.	Salem, OR:	99.34
331.	Chico, CA:	99.27
332.	Birmingham-Hoover, AL:	99.17
333.	Brainerd, MN:	99.07
334.	Bend, OR:	98.82
335.	Portland, ME:	98.64
336.	Traverse City, MI:	98.62
337.	Carbondale, IL:	98.59
338.	Fayetteville, NC:	98.37
339.	Brookings, OR:	98.21
340.	Beaumont-Port Arthur, TX:	98.13
341.	Gadsden, AL:	98.13
342.	Fort Wayne, IN:	97.47
343.	Beeville, TX:	97.43
344.	Shreveport-Bossier City, LA:	97.42
345.	Killeen-Temple-Fort Hood, TX:	97.23
346.	Hutchinson, KS:	97.21
347.	Burlington-South Burlington, VT:	97.15
348.	Gainesville, FL:	96.73
349.	Omaha-Council Bluffs, NE-IA:	96.53
350.	Keene, NH:	96.47
351.	Yankton, SD:	96.39
352.	Huntington-Ashland, WV-KY-OH:	96.29
353.	Nacogdoches, TX:	95.97
354.	Bangor, ME:	95.83
355.	Hilo, HI:	95.81
356.	Rio Grande City-Roma, TX:	95.79
357.	Forrest City, AR:	95.77
358.	Detroit-Warren-Livonia, MI:	95.69
359.	Scottsburg, IN:	95.56
360.	Waycross, GA:	95.46
361.	San Jose-Sunnyvale, CA:	95.45
362.	Brownsville-Harlingen, TX:	95.33
363.	Columbia, MO:	95.05
364.	Liberal, KS:	94.99
365.	Boise City-Nampa, ID:	94.90
366.	Macon, GA:	94.44
367.	Appleton, WI:	94.34
368.	Syracuse, NY:	94.11
369.	Montgomery, AL:	94.02
370.	Evansville, IN-KY:	94.02

371.	Jefferson City, MO:	93.98
372.	Stockton, CA:	93.88
373.	Adrian, MI:	93.86
374.	Faribault-Northfield, MN:	93.68
375.	Mansfield, OH:	93.62
376.	McAllen-Edinburg-Mission, TX:	93.54
377.	Clarksville, TN-KY:	93.53
378.	Youngstown-Warren, OH-PA:	93.43
379.	Bellingham, WA:	93.28
380.	Alamogordo, NM:	93.28
381.	Raymondville, TX:	93.26
382.	Las Cruces, NM:	93.26
383.	Dodge City, KS:	93.11
384.	Manchester-Nashua, NH:	93.06
385.	Gainesville, TX:	92.91
386.	Mount Airy, NC:	92.78
387.	Washington, NC:	92.70
388.	Lake Charles, LA:	92.65
389.	Oklahoma City, OK:	92.57
390.	Houston-Sugar Land-Baytown, TX:	92.41
391.	Gardnerville Ranchos, NV:	92.41
392.	Pittsburgh, PA:	92.32
393.	Wheeling, WV-OH:	92.18
394.	Hobbs, NM:	92.13
395.	Morehead City, NC:	92.08
396.	San Angelo, TX:	91.99
397.	Lynchburg, VA:	91.88
398.	Freeport, IL:	91.74
399.	Jonesboro, AR:	91.68
400.	Hartford-West Hartford, CT:	91.37
401.	Morristown, TN:	90.95
402.	Natchez, MS-LA:	90.94
403.	Palatka, FL:	90.62
404.	Sierra Vista-Douglas, AZ:	90.59
405.	Dickinson, ND:	90.48
406.	Trenton-Ewing, NJ:	90.31
407.	Elkhart-Goshen, IN:	90.14
408.	Grants Pass, OR:	89.85
409.	Salt Lake City, UT:	89.80
410.	Cleveland, TN:	89.76
411.	Fort Payne, AL:	89.54
412.	Johnson City, TN:	89.46
413.	Columbia, SC:	89.37
414.	Kansas City, MO-KS:	89.32

415.	Hammond, LA:	89.13
416.	Seneca, SC:	89.13
417.	Springfield, MA:	88.81
418.	Janesville, WI:	88.67
419.	Marshall, MN:	88.61
420.	Somerset, PA:	88.45
421.	Waterloo-Cedar Falls, IA:	88.31
422.	Longview, WA:	88.20
423.	Fayetteville, AR-MO:	88.15
424.	Altoona, PA:	88.08
425.	Frankfort, IN:	87.97
426.	Cornelia, GA:	87.94
427.	Farmington, NM:	87.79
428.	Connersville, IN:	87.76
429.	Jennings, LA:	87.75
430.	Scranton--Wilkes-Barre, PA:	87.65
431.	Lubbock, TX:	87.65
432.	Idaho Falls, ID:	87.61
433.	Oneonta, NY:	87.54
434.	Harrisburg-Carlisle, PA:	87.53
435.	Hot Springs, AR:	87.39
436.	Duluth, MN-WI:	87.30
437.	Milwaukee-Waukesha-W. Allis, WI:	86.80
438.	Redding, CA:	86.70
439.	Logan, UT-ID:	86.68
440.	Davenport-Moline, IA-IL:	86.60
441.	Bismarck, ND:	86.45
442.	Alexandria, LA:	86.27
443.	Wichita, KS:	86.10
444.	Cedar City, UT:	85.95
445.	New Castle, IN:	85.83
446.	Spokane, WA:	85.78
447.	Pascagoula, MS:	85.74
448.	Quincy, IL-MO:	85.73
449.	Flint, MI:	85.57
450.	Auburn-Opelika, AL:	85.53
451.	Joplin, MO:	85.27
452.	Red Wing, MN:	85.13
453.	Monroe, MI:	84.97
454.	Seattle-Tacoma-Bellevue, WA:	84.76
455.	Madison, WI:	84.42
456.	Tulsa, OK:	84.35
457.	Richmond, VA:	84.20
458.	Nogales, AZ:	83.95

459.	Pittsfield, MA:	83.64
460.	Vineland-Millville-Bridgeton, NJ:	83.51
461.	San Luis Obispo-Paso Robles, CA:	83.33
462.	Brookings, SD:	83.31
463.	Fairbanks, AK:	83.26
464.	Lakeland-Winter Haven, FL:	83.06
465.	Fremont, NE:	82.48
466.	Greensburg, IN:	82.27
467.	Stevens Point, WI:	82.21
468.	Pierre, SD:	82.19
469.	Florence, SC:	82.07
470.	Andrews, TX:	81.98
471.	Fresno, CA:	81.69
472.	Cortland, NY:	81.57
473.	Binghamton, NY:	81.45
474.	Watertown-Fort Drum, NY:	81.40
475.	Dyersburg, TN:	81.21
476.	Bainbridge, GA:	80.75
477.	Sebastian-Vero Beach, FL:	80.66
478.	Muskegon-Norton Shores, MI:	80.60
479.	Uvalde, TX:	80.59
480.	Glasgow, KY:	80.59
481.	Ann Arbor, MI:	80.34
482.	North Platte, NE:	80.26
483.	Ames, IA:	80.12
484.	Grand Rapids-Wyoming, MI:	80.12
485.	Merced, CA:	80.08
486.	Salisbury, NC:	79.91
487.	Dublin, GA:	79.90
488.	Kirksville, MO:	79.86
489.	Sidney, OH:	79.55
490.	Laurel, MS:	79.42
491.	Kennewick-Pasco-Richland, WA:	79.32
492.	Mount Pleasant, MI:	79.26
493.	Corvallis, OR:	79.09
494.	Dothan, AL:	79.00
495.	Lake City, FL:	78.72
496.	Iron Mountain, MI-WI:	78.67
497.	Lawrence, KS:	78.55
498.	Greenville, MS:	78.42
499.	Salina, KS:	78.37
500.	Brenham, TX:	78.35
501.	Ellensburg, WA:	78.35
502.	Hagerstown-Martinsburg, MD-WV:	78.32

503.	Longview, TX:	78.19
504.	Charleston-Mattoon, IL:	78.16
505.	Baton Rouge, LA:	78.08
506.	Thomasville, GA:	77.99
507.	Central City, KY:	77.94
508.	West Plains, MO:	77.88
509.	Lebanon, NH-VT:	77.80
510.	Roswell, NM:	77.72
511.	Florence-Muscle Shoals, AL:	77.71
512.	Show Low, AZ:	77.66
513.	Iowa City, IA:	77.46
514.	Lufkin, TX:	77.41
515.	Lewiston-Auburn, ME:	77.34
516.	St. Marys, GA:	77.24
517.	Twin Falls, ID:	77.22
518.	Holland-Grand Haven, MI:	77.12
519.	Danville, VA:	77.08
520.	Pine Bluff, AR:	76.96
521.	Concord, NH:	76.95
522.	Durango, CO:	76.94
523.	Greeneville, TN:	76.85
524.	Kearney, NE:	76.83
525.	New York, NY-NJ-PA:	76.81
526.	Culpeper, VA:	76.71
527.	Augusta-Waterville, ME:	76.55
528.	Pocatello, ID:	76.55
529.	Lincoln, NE:	76.44
530.	Fairmont, MN:	76.42
531.	Houma-Bayou Cane-Thibodaux, LA:	76.37
532.	Columbus, NE:	76.30
533.	Roanoke Rapids, NC:	76.23
534.	Mountain Home, ID:	76.17
535.	Fargo, ND-MN:	75.94
536.	Oxnard-Thousand Oaks-Ventura, CA:	75.87
537.	Cadillac, MI:	75.78
538.	Rockingham, NC:	75.71
539.	McComb, MS:	75.40
540.	New Haven-Milford, CT:	75.39
541.	Morgantown, WV:	75.30
542.	Homosassa Springs, FL:	75.23
543.	Bedford, IN:	75.20
544.	Raleigh-Cary, NC:	74.90
545.	Duncan, OK:	74.85
546.	Wahpeton, ND-MN:	74.61

547.	Thomasville-Lexington, NC:	74.57
548.	Philadelphia, PA-NJ-DE-MD:	74.44
549.	Daphne-Fairhope-Foley, AL:	74.42
550.	Mount Vernon-Anacortes, WA:	74.32
551.	Borger, TX:	74.24
552.	Rochester, MN:	74.24
553.	Dalton, GA:	74.23
554.	Dubuque, IA:	74.00
555.	Minot, ND:	73.78
556.	Frankfort, KY:	73.73
557.	Niles-Benton Harbor, MI:	73.64
558.	Southern Pines-Pinehurst, NC:	73.53
559.	Madison, IN:	73.39
560.	Fredericksburg, TX:	73.29
561.	St. Joseph, MO-KS:	73.24
562.	Fallon, NV:	73.05
563.	Kennett, MO:	73.03
564.	Watertown, SD:	72.92
565.	Champaign-Urbana, IL:	72.84
566.	Eureka-Arcata-Fortuna, CA:	72.82
567.	Corinth, MS:	72.69
568.	Kankakee-Bradley, IL:	72.52
569.	Bemidji, MN:	72.49
570.	Des Moines-West Des Moines, IA:	72.39
571.	Charleston, WV:	72.17
572.	Sioux City, IA-NE-SD:	72.08
573.	Mexico, MO:	72.03
574.	Santa Rosa-Petaluma, CA:	71.85
575.	Vidalia, GA:	71.54
576.	Coeur d’Alene, ID:	71.43
577.	Austin, MN:	71.10
578.	Bennington, VT:	71.05
579.	Big Rapids, MI:	70.90
580.	Enid, OK:	70.87
581.	Jackson, MI:	70.76
582.	Albany-Schenectady-Troy, NY:	70.75
583.	Gainesville, GA:	70.70
584.	Rochester, NY:	70.66
585.	Allentown-Bethlehem, PA-NJ:	70.34
586.	Tupelo, MS:	70.33
587.	Greenwood, MS:	70.27
588.	Huntington, IN:	70.16
589.	Wausau, WI:	70.15
590.	Midland, MI:	70.08

591.	Punta Gorda, FL:	69.93
592.	Crawfordsville, IN:	69.91
593.	Woodward, OK:	69.65
594.	Port Angeles, WA:	69.59
595.	Fort Smith, AR-OK:	69.44
596.	Rutland, VT:	69.37
597.	Marshall, TX:	69.20
598.	Coos Bay, OR:	69.07
599.	Albany-Lebanon, OR:	68.98
600.	Lancaster, PA:	68.77
601.	Helena, MT:	68.73
602.	Selma, AL:	68.59
603.	Mason City, IA:	68.33
604.	Prineville, OR:	68.28
605.	Aberdeen, WA:	68.21
606.	East Stroudsburg, PA:	68.03
607.	Aberdeen, SD:	67.52
608.	Watertown-Fort Atkinson, WI:	67.47
609.	Phoenix Lake-Cedar Ridge, CA:	67.31
610.	Russellville, AR:	67.27
611.	Klamath Falls, OR:	67.02
612.	Altus, OK:	66.81
613.	Lewiston, ID-WA:	66.77
614.	Hastings, NE:	66.67
615.	Fond du Lac, WI:	66.61
616.	Staunton-Waynesboro, VA:	66.55
617.	Wooster, OH:	66.54
618.	Prescott, AZ:	66.41
619.	Payson, AZ:	66.30
620.	Ottawa-Streator, IL:	66.15
621.	Kerrville, TX:	66.10
622.	Brownwood, TX:	66.00
623.	Michigan City-La Porte, IN:	65.91
624.	Mitchell, SD:	65.78
625.	Gulfport-Biloxi, MS:	65.60
626.	Battle Creek, MI:	65.59
627.	Alexandria, MN:	65.50
628.	Moses Lake, WA:	65.27
629.	El Dorado, AR:	64.70
630.	Paris, TN:	64.68
631.	Shelby, NC:	64.63
632.	Olympia, WA:	64.57
633.	Hereford, TX:	64.26
634.	Cedar Rapids, IA:	64.21

635.	Butte-Silver Bow, MT:	64.21
636.	Green Bay, WI:	64.13
637.	Vicksburg, MS:	64.13
638.	Gillette, WY:	64.03
639.	Marquette, MI:	64.00
640.	Sumter, SC:	63.99
641.	Burlington, IA-IL:	63.65
642.	Pendleton-Hermiston, OR:	63.45
643.	Fort Morgan, CO:	63.43
644.	Lexington Park, MD:	63.42
645.	Roseburg, OR:	63.35
646.	Winona, MN:	63.31
647.	Galesburg, IL:	63.13
648.	Magnolia, AR:	62.99
649.	Warsaw, IN:	62.77
650.	Eau Claire, WI:	62.60
651.	Marshfield-Wisconsin Rapids, WI:	62.38
652.	Carlsbad-Artesia, NM:	62.36
653.	Danville, IL:	62.27
654.	Mount Sterling, KY:	62.23
655.	Ardmore, OK:	62.05
656.	Palestine, TX:	62.04
657.	Cumberland, MD-WV:	61.91
658.	Thomaston, GA:	61.85
659.	Mineral Wells, TX:	61.71
660.	Athens, OH:	61.51
661.	Big Spring, TX:	61.49
662.	Peoria, IL:	61.29
663.	Great Bend, KS:	61.22
664.	Blytheville, AR:	61.21
665.	Gettysburg, PA:	61.00
666.	Willmar, MN:	60.95
667.	Clewiston, FL:	60.78
668.	Grand Island, NE:	60.74
669.	Seymour, IN:	60.66
670.	Logansport, IN:	60.61
671.	Wilmington, OH:	60.35
672.	Olean, NY:	60.14
673.	Greeley, CO:	60.10
674.	Rock Springs, WY:	59.99
675.	Jasper, IN:	59.99
676.	Newport, TN:	59.81
677.	Racine, WI:	59.64
678.	Eagle Pass, TX:	59.52

679.	Willimantic, CT:	59.44
680.	Plymouth, IN:	59.43
681.	Whitewater, WI:	59.17
682.	Ogden-Clearfield, UT:	59.17
683.	Plattsburgh, NY:	59.14
684.	Bucyrus, OH:	59.13
685.	Crescent City, CA:	59.07
686.	Fort Polk South, LA:	59.05
687.	Warrensburg, MO:	58.77
688.	Warren, PA:	58.77
689.	Amsterdam, NY:	58.61
690.	Ukiah, CA:	58.35
691.	Yakima, WA:	58.34
692.	Norfolk, NE:	58.32
693.	Corning, NY:	58.31
694.	Victoria, TX:	58.19
695.	Newton, IA:	58.00
696.	Ketchikan, AK:	57.93
697.	Decatur, AL:	57.66
698.	Marshalltown, IA:	57.59
699.	Barre, VT:	57.27
700.	Montrose, CO:	57.16
701.	Weatherford, OK:	57.01
702.	Bridgeport-Stamford-Norwalk, CT:	56.94
703.	Gaffney, SC:	56.69
704.	Chambersburg, PA:	56.40
705.	Wenatchee-East Wenatchee, WA:	56.09
706.	Bremerton-Silverdale, WA:	55.80
707.	Coffeyville, KS:	55.45
708.	Toccoa, GA:	55.15
709.	Owosso, MI:	55.13
710.	Hope, AR:	55.12
711.	Angola, IN:	55.12
712.	Bay City, TX:	55.11
713.	Beatrice, NE:	55.05
714.	Centralia, WA:	55.02
715.	Moscow, ID:	55.02
716.	Worthington, MN:	54.92
717.	La Grande, OR:	54.47
718.	Harrison, AR:	54.14
719.	Norwalk, OH:	54.05
720.	Scottsbluff, NE:	53.97
721.	Picayune, MS:	53.89
722.	Corsicana, TX:	53.80

723.	Truckee-Grass Valley, CA:	53.56
724.	Oak Harbor, WA:	53.41
725.	Sterling, CO:	53.29
726.	Centralia, IL:	53.22
727.	Dillon, SC:	53.18
728.	Lexington, NE:	53.08
729.	Houghton, MI:	52.97
730.	Pampa, TX:	52.97
731.	DuBois, PA:	52.91
732.	Celina, OH:	52.86
733.	Batavia, NY:	52.67
734.	Kodiak, AK:	52.59
735.	Humboldt, TN:	52.52
736.	York-Hanover, PA:	52.32
737.	Canon City, CO:	52.32
738.	Allegan, MI:	52.14
739.	Guymon, OK:	52.05
740.	Albert Lea, MN:	51.93
741.	Havre, MT:	51.86
742.	Jamestown-Dunkirk-Fredonia, NY:	51.85
743.	Talladega-Sylacauga, AL:	51.80
744.	Anderson, SC:	51.61
745.	Elk City, OK:	51.40
746.	Safford, AZ:	51.33
747.	La Crosse, WI-MN:	51.00
748.	Moultrie, GA:	50.78
749.	Athens, TX:	50.71
750.	Pecos, TX:	50.62
751.	Owatonna, MN:	50.61
752.	Lamesa, TX:	50.39
753.	Hanford-Corcoran, CA:	50.27
754.	Mount Vernon, OH:	50.01
755.	Auburn, NY:	49.78
756.	Lock Haven, PA:	49.76
757.	Marion, OH:	49.69
758.	Vermillion, SD:	49.50
759.	Williamsport, PA:	49.36
760.	Juneau, AK:	49.14
761.	Yuba City, CA:	48.82
762.	Morgan City, LA:	48.76
763.	Price, UT:	48.55
764.	Johnstown, PA:	48.40
765.	Mountain Home, AR:	47.86
766.	Ontario, OR-ID:	47.82

767.	Parsons, KS:	47.58
768.	Sault Ste. Marie, MI:	47.25
769.	Bellefontaine, OH:	47.20
770.	Sheridan, WY:	47.19
771.	Utica-Rome, NY:	46.89
772.	New Philadelphia-Dover, OH:	46.80
773.	El Campo, TX:	46.62
774.	Decatur, IN:	46.58
775.	Oshkosh-Neenah, WI:	46.13
776.	Point Pleasant, WV-OH:	46.02
777.	Provo-Orem, UT:	46.01
778.	Moberly, MO:	45.96
779.	Ogdensburg-Massena, NY:	45.92
780.	Clinton, IA:	45.60
781.	Emporia, KS:	45.45
782.	Walla Walla, WA:	45.45
783.	New Castle, PA:	45.28
784.	Tahlequah, OK:	45.12
785.	Wapakoneta, OH:	45.02
786.	Pullman, WA:	44.99
787.	Scottsboro, AL:	44.80
788.	Granbury, TX:	44.76
789.	Harriman, TN:	44.50
790.	Ottumwa, IA:	44.48
791.	Hudson, NY:	44.44
792.	McMinnville, TN:	44.12
793.	Las Vegas, NM:	43.90
794.	Huntsville, TX:	43.72
795.	Reading, PA:	43.52
796.	Visalia-Porterville, CA:	43.38
797.	New Ulm, MN:	43.20
798.	Fairmont, WV:	43.17
799.	Urbana, OH:	43.08
800.	Harrisburg, IL:	42.67
801.	Vernal, UT:	42.62
802.	Fort Madison-Keokuk, IA-MO:	42.57
803.	Jacksonville, TX:	42.52
804.	Shelton, WA:	42.40
805.	North Vernon, IN:	42.06
806.	Glens Falls, NY:	42.01
807.	Crossville, TN:	41.97
808.	Paragould, AR:	41.85
809.	Hutchinson, MN:	41.73
810.	Valley, AL:	41.61

811.	Mayfield, KY:	41.30
812.	Menomonie, WI:	41.22
813.	London, KY:	41.13
814.	Vernon, TX:	40.98
815.	Poughkeepsie-Newburgh, NY:	40.81
816.	New Iberia, LA:	40.78
817.	Shelbyville, TN:	40.77
818.	Cambridge, MD:	40.27
819.	Jamestown, ND:	40.15
820.	Enterprise-Ozark, AL:	40.03
821.	Lebanon, PA:	39.77
822.	Ashtabula, OH:	39.76
823.	Albemarle, NC:	39.67
824.	Seneca Falls, NY:	39.45
825.	Riverton, WY:	39.15
826.	Lewisburg, TN:	38.90
827.	Eufaula, AL-GA:	38.73
828.	Dixon, IL:	38.70
829.	Brevard, NC:	38.66
830.	Spencer, IA:	38.59
831.	Walterboro, SC:	38.33
832.	Spirit Lake, IA:	37.99
833.	Levelland, TX:	37.80
834.	Clarksdale, MS:	37.75
835.	Peru, IN:	37.64
836.	Hannibal, MO:	37.59
837.	Ada, OK:	37.48
838.	Fergus Falls, MN:	37.33
839.	Sheboygan, WI:	37.21
840.	Williston, ND:	37.08
841.	Lincoln, IL:	36.89
842.	Durant, OK:	36.82
843.	Pontiac, IL:	36.76
844.	Winfield, KS:	36.61
845.	Elko, NV:	36.61
846.	Marble Falls, TX:	36.54
847.	Oskaloosa, IA:	36.51
848.	Snyder, TX:	36.23
849.	St. Marys, PA:	36.16
850.	Steubenville-Weirton, OH-WV:	36.11
851.	East Liverpool-Salem, OH:	36.11
852.	Sebring, FL:	35.42
853.	Greenville, OH:	34.95
854.	Dunn, NC:	33.89

855.	Kingston, NY:	33.88
856.	Bogalusa, LA:	33.59
857.	Lancaster, SC:	33.53
858.	Manitowoc, WI:	33.16
859.	Cedartown, GA:	33.02
860.	Oak Hill, WV:	32.90
861.	Torrington, CT:	32.88
862.	Monroe, WI:	32.88
863.	Sayre, PA:	32.86
864.	Helena-West Helena, AR:	32.82
865.	Crowley, LA:	32.81
866.	Palm Coast, FL:	32.57
867.	Dover, DE:	32.54
868.	Muscatine, IA:	32.38
869.	Miami, OK:	32.32
870.	Dumas, TX:	32.08
871.	Tiffin, OH:	32.06
872.	Pahrump, NV:	31.61
873.	Ashland, OH:	31.56
874.	Bradford, PA:	30.70
875.	Heber, UT:	30.60
876.	Chester, SC:	30.54
877.	Bonham, TX:	30.23
878.	Sunbury, PA:	30.07
879.	Marinette, WI-MI:	29.95
880.	Wabash, IN:	29.88
881.	Pella, IA:	29.71
882.	Opelousas-Eunice, LA:	29.55
883.	Alexander City, AL:	29.47
884.	Lincolnton, NC:	29.13
885.	McPherson, KS:	29.00
886.	West Point, MS:	28.97
887.	Kendallville, IN:	28.58
888.	Susanville, CA:	28.18
889.	La Follette, TN:	27.92
890.	Storm Lake, IA:	27.83
891.	Abbeville, LA:	27.68
892.	Alpena, MI:	27.38
893.	DeRidder, LA:	26.71
894.	Coshocton, OH:	26.69
895.	Union, SC:	26.61
896.	Rexburg, ID:	26.48
897.	Wauchula, FL:	26.14
898.	Sulphur Springs, TX:	25.97

899.	Taylorville, IL:	25.82
900.	Madera-Chowchilla, CA:	25.76
901.	Tullahoma, TN:	25.71
902.	Sterling, IL:	25.52
903.	Pottsville, PA:	25.29
904.	Burley, ID:	25.14
905.	Blackfoot, ID:	25.13
906.	Silver City, NM:	24.14
907.	Los Alamos, NM:	23.58
908.	Canton, IL:	23.51
909.	Fitzgerald, GA:	23.29
910.	Atchison, KS:	22.60
911.	Malone, NY:	22.38
912.	Marshall, MO:	22.19
913.	Martin, TN:	21.66
914.	Beaver Dam, WI:	21.58
915.	Brigham City, UT:	21.17
916.	Camden, AR:	21.00
917.	Oil City, PA:	20.91
918.	Sturgis, MI:	20.84
919.	Minden, LA:	20.76
920.	Huron, SD:	20.11
921.	Merrill, WI:	19.11
922.	Fernley, NV:	17.89
923.	Evanston, WY:	17.83
924.	Clearlake, CA:	17.50
925.	Newberry, SC:	17.20
926.	Gloversville, NY:	17.15
927.	Washington, IN:	16.48
928.	Huntingdon, PA:	16.28
929.	Brownsville, TN:	16.11
930.	Boone, IA:	15.94
931.	Rochelle, IL:	15.78
932.	Summerville, GA:	15.13
933.	Van Wert, OH:	14.92
934.	Lewistown, PA:	14.79
935.	Platteville, WI:	13.96
936.	Bennettsville, SC:	13.47
937.	Claremont, NH:	11.82
938.	Arcadia, FL:	11.37
939.	Indianola, MS:	4.80
940.	Pierre Part, LA:	4.14
941.	Tallulah, LA:	3.70
942.	Yazoo City, MS:	1.47

12.3 Market Resources

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

13

TOP MARKETS FOR QSR GROWTH

13.1 Top 40 Markets For Quick-Service Restaurant Expansion

According to *QSR* (January 2013), based on an assessment by The NPD Group (www.npd.com), the top 40 markets for quick-service restaurant expansion through 2016 are as follows:

	QSR Traffic Grow th Forecast	QSR Units	Projected Population Change
Large Markets			
• Denver, CO:	11.1%	4,789	6%
• Washington, DC:	10.9%	6,292	8%
• Charlotte, NC:	9,0%	2,915	9%
• Houston, TX:	8.9%	6,508	10%
• Orlando-Daytona Beach-Melbourne, FL:	8.0%	3,659	8%
• Nashville, TN:	7.6%	2,579	7%
• Minneapolis-Saint Paul, MN:	7.2%	3,945	4%
• San Diego, CA:	6.4%	3,584	6%
• Dallas-Ft. Worth, TX:	5.5%	8,002	6%
• Indianapolis, IN:	5.0%	2,940	5%
• Miami-Ft. Lauderdale, FL:	4.8%	3,961	1%
• Raleigh-Durham, NC:	4.6%	2,748	10%
• San Antonio, TX:	4.4%	2,361	12%
• Seattle-Tacoma, WA:	4.0%	5,739	7%
• Salt Lake City, UT:	3.6%	2,731	8%
Medium Markets			
• Waco-Temple-Bryan, TX:	21.0%	985	13%
• Las Vegas, NV:	17.7%	2,323	12%
• Greenville-Spartanburg-Asheville-Anderson, SC-NC:	13.2%	2,095	7%
• Huntsville-Decatur, Florence, AL:	12.5%	878	8%
• Austin, TX:	11.8%	2,023	13%
• Ft. Myers-Naples, FL:	11.3%	1,145	9%
• Tulsa, Ok:	11.2%	1,516	6%
• Harlingen-Weslaco-Brownsville-McAllen, TX:	11.2%	1,011	13%

• Buffalo, NY:	10.0%	1,531	1%
• Albuquerque-Santa Fe, NM:	9.6%	1,760	8%
• Wichita-Hutchinson, KS:	9.6%	1,224	5%
• Fresno-Visalia, CA:	9.3%	1,778	8%
• Columbus, OH:	9.3%	2,651	7%
• Rochester, NY:	8.2%	1,030	4%
• Jacksonville-Brunswick, FL-GA:	7.6%	1,831	7%

Small Markets

• Yuma-El Centro, AZ-CA:	19.6%	276	10%
• Fargo-Valley City, ND:	16.0%	512	6%
• Odessa-Midland, TX:	16.0%	413	12%
• Medford-Klamath Falls, OR:	15.1%	500	4%
• Laredo, TX:	14.7%	229	13%
• Helena, MT:	14.4%	70	11%
• Wilmington, NC:	14.4%	453	12%
• Bakersfield, CA:	13.5%	732	12%
• Columbus, GA:	13.4%	566	6%
• Palm Springs, CA:	13.2%	441	12%

PART IV: MARKET SEGMENTS

14

CASUAL-DINING RESTAURANTS

14.1 Profile

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

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

According to *2012 Chain Restaurant Operators*, published by Chain Store Guide (www.chainstoreguide.com), there are 35,909 casual-dining chain restaurants in the United States.

14.2 Overview

Few consumer business segments were hit harder by the recent economic woes than casual-dining restaurants. The segment began to recover in 2012. Surveys by Dectiva (www.dectiva.com) found consumers spending 41.1% of their dining dollars at casual-dining restaurants in 2012 compared with 38.7% a year prior. For comparison, spending at limited-service restaurants dropped four percentage points during the same timeframe.

> **"After years of being pummeled by the economy, casual-dining operators are shaking off the hits and starting to win back the tight-fisted consumers who spurred them for lower-priced fast-casual and quick-service options."**
>
> *Nation's Restaurant News,* 6/11/12

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

"Casual-dining chains aim to drive sales with beverages, gift cards, and healthful menu items."

Nation's Restaurant News, 6/11/12

Major chains across the casual-dining concept are re-imaging, changing with the times, and refocusing on the post-recession consumer. For some, this involves a brand makeover rather than simply adding new menu items and making cosmetic changes. Among the chains refreshing their brand image is Applebee's Neighborhood Bar & Grill, which renovated all of its 1,900 locations, with an investment that averaged over $200,000 per location.

"The industry's casual-dining segment is known for concepts that can be costly to build and complicated to run, but they are also known to be high sales generators."

Nation's Restaurant News, 6/25/12

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

15

CATERING & BANQUETS

15.1 Profile

The National Restaurant Association (www.restaurant.org) forecasts social caterers' sales at $8.38 billion for 2013, a 5.6% increase over 2012. For comparison, the overall commercial restaurant sector is projected to grow 3.8% in 2013. Including hotel and on-premise banquets and other types of catering, the segment generates an estimated $15 billion, according to the association.

With a broader definition of the market, Technomic (www.technomic.com) pegs the catering market at $33.3 billion, with restaurants holding a 69% marketshare, followed by caterers, supermarkets, warehouse clubs, and other retailers.

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.

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

15.2 Overview

A survey of the catering industry was recently conducted by the Department of Food and Beverage Management, School of Hotel Administration, Cornell University, and *Catersource*. A total of 327 caterers responded to the survey, with 79% reporting that off-premise catering was their primary business focus. The caterers reported typical party size as follows (percentage of survey respondents):

- Less than 100: 14%
- 100-to-250: 68%
- More than 250: 17%

An overwhelming majority of the survey respondents indicated labor issues as their biggest concern – including the hiring of chefs and kitchen personnel, service staff (both-full and part-time), and sales staff. The operators also cited being concerned about their ability to continue to grow their businesses amid increased competition.

While the catering market for corporate conventions and events declined during the economic downturn, the drop was more than offset by increased demand for in-home catering. A survey by Technomic found that 40% of consumers were increasing their entertainment activities at home, and when doing so are just as likely to source food for these occasions from restaurants as from food retailers. This demand has drawn more restaurants into the catering marketplace.

Another growing part of the catering business is the restaurant banquet business, also known as private dining, which has attracted several major chains as well as multi-concept operators and fine-dining independents. One example is Buckhead Life Group (www.buckheadrestaurants.com), the largest fine-dining operator in Atlanta, which converted 103 West, one of its 11 restaurants, from fine-dining to private dining. The facility can accommodate parties from six to 600 and caters to business meetings and events, bar/bat mitzvahs, engagement parties and showers, rehearsal dinners, and wedding receptions. Fleming's Prime Steakhouse & Wine Bar (www.flemingssteakhouse.com), a 164-unit chain that is part of the Outback Steakhouse family, derives upward of 15% of sales from private parties.

Similar to the trend in restaurants, caterers are experiencing increased demand for healthful items and locally sourced menu items. There is also an increasing demand for cultural and international items on catering menus.

15.3 Market Resources

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

16

COFFEESHOPS

16.1 Profile

According to *Coffee Shops Industry Profile*, published in November 2012 by First Research (www.firstresearch.com), there are approximately 20,000 coffeeshops in the United States. This count does not include coffee served at quick-service restaurants. Starbucks, with over 11,000 locations, dominates the segment. Caribou Coffee and Peet's Coffee & Tea, with 486 and 196 locations, respectively, are the only other coffeeshop chains ranking among the 200 largest restaurant chains. There are about 8,000 independent coffeeshops in the U.S.

According to The NPD Group (www.npd.com), six billion servings of coffee are served 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.

16.2 Overview

Coffee-drinking patterns appear to be regional. In the West, for example, 42% of people typically drink their coffee in coffeeshops, while only 27% of Southerners do so. According to Mintel (www.mintel.com), the following is where consumers, by region, prefer to get their coffee outside the home:

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

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

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

A persistent challenge for coffeeshops is to expand business beyond the morning and early afternoon hours. Starbucks locations report 70% of business is before 2 p.m. Efforts to increase day-long consumption, which have included coffee served at varying temperatures and flavored with a wide range of ingredients, have been successful. The NPD Group reported that the number of coffee servings ordered in the afternoon was up 4% for the twelve-month period ending June 2012; orders for specialty coffees were up 4.6%.

In 2012, Starbucks added beer, wine, and food offerings to select stores in the Atlanta, Chicago, and Southern California markets. The concept was tested in 2011 in five Seattle and one Portland store. The food menu includes flatbreads, small plates, and snacks.

Starbucks plans to open 1,600 U.S. locations from 2013 through 2017; 60% will include drive thrus.

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

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

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

17

CONTRACT-MANAGED FOODSERVICE

17.1 Profile

The National Restaurant Association (www.restaurant.org) projects food and drink revenue for contract-managed foodservices at $45.62 billion for 2013, a 4.0% increase over 2012. Distribution is as follows (change from previous year in parenthesis):

- Colleges and universities: $14.54 billion (3.2%)
- Manufacturing and industrial plants: $ 7.78 billion (5.2%)
- Primary and secondary schools: $ 6.46 billion (3.8%)
- Recreation and sports centers: $ 6.08 billion (4.0%)
- Hospitals and nursing homes: $ 5.65 billion (5.5%)
- Commercial and office buildings: $ 2.82 billion (2.8%)
- In-transit foodservice (airlines): $ 2.28 billion (3.2%)

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 accounted for 34% of total U.S. foodservice sales in 2012, garnering over $200 billion in sales (retail sales equivalent)."

Technomic, 2/21/13

Technomic (www.technomic.com) defines the noncommercial segment as including colleges and universities, K-12 school districts, healthcare, retail meal solutions, convenience stores, travel centers, lodging/hotels, recreation, travel, business and industry, military, corrections, daycare, group purchasing organizations, and foodservice management firms.

17.2 Overview

For 2013 Technomic expects the strongest growth in the healthcare (4.5%) and business & industry (4.0%) subsegments. As a whole, noncommercial foodservice operations are forecast to grow 3.7%.

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

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

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

18

CONVENIENCE STORE FOODSERVICE

18.1 Profile

According to the National Association of Convenience Stores (NACS, www.nacsonline.com), there were 149,220 convenience stores (c-stores) in the United States at year-end 2012.

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

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

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

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

18.2 Overview

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%

"C-stores account for 22% of the snack market in the U.S. while fast-food chains account for 20%."

The NPD Group
Advertising Age, 1/2/12

Market Intelligence Report: Convenience Stores, a November 2012 report by Technomic (www.technomic.com), provides the following assessment of c-store foodservice:

- Fifty-two percent (52%) of consumers pick up snacks from prepared-food sections of convenience stores or mini-marts, an increase from 37% who did so in 2010.
- Twenty-two percent (22%) of consumers occasionally have breakfast from a c-store during the week, an increase from 12% who did so in 2010.
- Thirteen percent (13%) purchase breakfast from c-stores on the weekend, an increase from 7% who did so in 2010.
- During the week, 17% of consumers say they purchase lunch from a convenience store. For comparison, 56% purchase lunch from a quick-service restaurant and 20% do so from a grocery store.
- While c-stores score well with consumers in terms of convenience, portability, speed of food preparation, and service, the healthfulness of the food is considered satisfactory to only 28% of consumers.
- C-store foodservice is projected to grow nominally by 2.5% in 2013 and 2014.

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

"As revenues from gasoline and tobacco products fall, foodservice sales are increasingly becoming convenience stores' most profitable category."

Technomic, 11/28/12

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-brand with c-stores.

19

FAMILY-DINING RESTAURANTS

19.1 Profile

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

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

Fifteen (15) family-dining chains ranked among the 200 largest U.S. restaurant chains in 2012, according to *Nation's Restaurant News*. Their combined sales were $12.86 billion; they operated 8,683 units.

19.2 Overview

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

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

Until the current economic downturn, the family-dining segment had been losing business to upscale casual-dining restaurants as well as to less expensive, quick-service restaurants. The trend of consumers migrating from family-dining reversed with the economic downturn. The return of customers to family-dining is attributed to an expanded focus by major chains as well as emphasis on value. 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.

> **"Business-building efforts such as upgrading ingredient quality and introducing menu items with on-trend appeal appear to be paying dividends for family brands. Patrons no longer have to shop outside the segment to find premium steaks, gourmet burgers, locally raised produce, and ethnic favorites."**
>
> *Nation's Restaurant News*, 7/23/12

20

FAST-CASUAL RESTAURANTS

20.1 Profile

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

> **"Everyone understands the system: interactive service with food made in front of you; customizable upscale options; bolder flavors; distinctive, contemporary decor; more youthful appeal than dinnerhouses but more mature than fast-food plasticity; prices about half-again as much as fast-food; and consumers tolerating slower service in exchange for better quality."**
>
> Michael Whiteman, Chairman
> Baum + Whiteman, 12/12

Sales for the fast-casual segment were $27 billion in 2011 (most recent data available). The largest 150 fast-casual chains account for $21.5 billion of this amount, according to *Fast Casual Top 150 Chain Restaurant Report*, published in May 2012 by Technomic (www.technomic.com).

Technomic estimates there are about 22,000 restaurants in the fast-casual segment.

20.2 Overview

According to the Technomic, menu focus within the fast-casual segment is as follows:

- Mexican: 20%
- Bakery cafe: 18%
- Sandwiches other than burgers: 16%
- Hamburger: 11%
- Chicken: 9%
- Specialty*: 9%
- Pizza: 7%
- Asian: 6%

  * Includes: Barbecue, healthful, Italian, other ethnic, and soup

The NPD Group (www.npd.com) segments fast-casual customers as follows:

- Switchers: 40%
  Go where new items and promotions are; skew to females, younger adults, middle-aged adults, and higher incomes

- Loyals: 38%
  Visit same brands regardless of special offers; skew to males and higher incomes

- Lapsed: 14%
  Seldom go or don't think about it; skew to older adults and lower incomes

- Price Sensitive: 8%
  Go for lowest price/discounts; skew to lower incomes

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

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

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

> **“Everyone wants to be the next Chipotle. We’re seeing fast-casual service systems applied to pizza, fish and chicken, Greek food, noodles, Asian food, hot dogs, and taquerias.”**
>
> Michael Whiteman, Chairman
> Baum + Whiteman, 12/12

20.3 Comparison of Quick-Service and Fast-Casual

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

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

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

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

The following are other findings of Technomic’s study:

- Seventy-two percent (72%) of consumers visit fast-food restaurants once a week or more, while 49% visit fast-casual restaurants, in part because there are fewer locations but also because they are more attractive to higher income consumers.
- Consumers visit fast-food and fast-casual restaurants for lunch more often than for any other daypart; 21% purchase fast-food lunches at least twice a week and 19% visit fast-casual restaurants, largely due to time pressures.

- Breakfast sandwiches have grown by 35% at fast-food restaurants and by 29% at fast-casual chains, showing the strength of breakfast entrèes at LSRs.
- Gluten-free options and the growing importance of better-for-you kids' meals continue to guide better-for-you LSR menu development.
- Street food influences continue. Rustic, handheld street foods with a global spin have helped LSR menu developers create unique and craveable offerings. Consumers are looking for new flavor supplements for their sophisticated palettes.

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

21

FINE-DINING

21.1 Profile

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

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

21.2 Overview

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

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

Fifty-one percent (51%) of fine-dining operators experienced increased sales in 2012, the highest among all full-service segments, according to the National Restaurant Association (www.restaurant.org). Fifty-seven percent (57%) anticipate increased sales in 2013.

“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, 11/12/12

No restaurant segment has benefitted more from the uptick in business and leisure travel than fine-dining. Travelers and tourists represent an average of 29% of sales for fine-dining operators, according to the National Restaurant Association. Americans took 2.04 person-trips in 2012, surpassing the pre-recession mark set in 2007, according to the U.S. Travel Association (www.ustravel.org). Traveler spending also rebounded to pre-recession levels in 2012. The increase in spending was twice that of the number of trips, indicating that those who do travel for business and leisure are spending more freely on things such as fine dining.

Still, while visits to fine-dining restaurants increased 4% in 2012, traffic has yet to return to pre-recession levels, according to The NPD Group (www.npd.com). 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, 11/12/12

A new segment, polished casual, is emerging to satisfy customers wanting fine-dining quality in a less formal environment.

“Fine- and casual-dining meet in the middle to create an accessible upscale segment.”

Nation’s Restaurant News, 11/12/12

22

FOOD CONCESSIONS AT AIRPORTS

22.1 Profile

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

The following airports have the highest food and beverage sales:

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

22.2 Overview

Despite the reduction in air traffic at some of the larger airports, travelers are spending more at airport restaurants as they become increasingly aware of the good dining options that are available.

According to Amy Snow, Concessions Manager at Los Angeles International Airport, travelers are spending more per transaction at airport-based restaurants, an indication that they are increasingly choosing upscale dining options.

According to Chain Store Guide (www.chainstoreguide.com), there are 124 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.delawrenorth.com)
- HMSHost (www.hmshost.com)
- SSP America (www.foodtravelexperts.com)

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

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

Austin-Bergstrom International Airport (Austin, TX)
- The Salt Lick (West Concourse)

Baltimore Washington International Airport (Baltimore, MD)
- Obrycki's (Concourse B)

Boston Logan International Airport (Boston, MA)
- Bonfire (Termonal B)
- Legal Test Kitchen (Terminal A)

Charlotte/Douglas International Airport (Charlotte, NC)
- Brookwood Farms BBQ (Main Terminal Atrium)
- Yadkin Valley Wine Bar (Connector Between Terminals D and E)

Chicago O'Hare International Airport (Chicago, IL)
- Berghoff Café (Terminal 1)
- Tortas Frontera (Terminal 1)

Dallas/Fort Worth International Airport (Dallas, TX)
- Cousin's Barbecue (Terminals B and D)
- La Bodega Winery (Terminals A and D)
- Pappadeaux Seafood Kitchen (Terminal A)

Denver International Airport (Denver, CO)
- New Belgium Hub (Concourse B)
- Tamales by La Casita (Concourse C)

General Mitchell International Airport (Milwaukee, WI)
- Usinger's (Concourse D)

George Bush Intercontinental Airport (Houston, TX)
- Pappadeaux Seafood Kitchen (Terminal E)

Hartsfield-Jackson Atlanta International Airport (Atlanta, GA)
- One Flew South (Terminal E)
- Paschal's Restaurant (Concourse A food court; Main Terminal Atrium)

John F. Kennedy International Airport (New York, NY)
- Aeronuova (Terminal 5)
- Brasserie La Vie (Terminal 5)
- Deep Blue (Terminal 5)
- Piquillo (Terminal 5)

LaGuardia International Airport (New York, NY)
- Custom Burgers by Pat LaFrieda (Terminal D)
- Figs (Central Terminal Building; between Concourses B & C)
- Prime Tavern (Terminal D)
- Tagliare (Terminal D)

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

Memphis International Airport (Memphis, TN)
- Corky's BBQ (Terminals A and C)

Miami International Airport (Miami, FL)
- Beaudevin (Terminal D)
- La Carreta (Terminal D)

Minneapolis-St. Paul International Airport (St. Paul, MN)
- French Meadow Bakery & Café (Concourse F)
- Ike's Food and Cocktails (The Mall; across from Checkpoint 1)

Newark Liberty International Airport (Newark, NJ)
- Gallagher's Steak House (Terminal C)
- Vino Volo (Terminal C)

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

Phoenix Sky Harbor International Airport (Phoenix, AZ)
- El Bravo (Terminal 4)

Portland International Airport (Portland, OR)
- Rogue Ales (Concourse D)

San Antonio International Airport (San Antonio, TX)
- Vino Volo (Terminal A)

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

Seattle-Tacoma International Airport (Seattle, WA)
- Anthony's (Central Terminal)
- Dish D'Lish (Central Terminal)

Washington Dulles International Airport (Dulles, VA)
- Five Guys Burgers and Fires (Terminals A and B)
- Vino Volo (Concourses B and C)

22.3 Market Resources

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

23

FOOD CONCESSIONS AT SPORTS VENUES

23.1 Market Assessment

SportsBusiness Journal estimates revenue from on-site game-day concessions, merchandise, and parking at approximately $11 billion.

Of 133 major league facilities, 122 had contracts with independent companies to operate their general concessions in 2012; 11 had in-house operations, according to *SportsBusiness Journal*. For premium-seat catering, 123 facilities contracted with outside suppliers; 8 handled this service in-house.

Premium concessions are probably the most lucrative aspect of sports food-service. The NFL's suite/club seating market alone yields approximately $2 billion annually, according to the Association of Luxury Suite Directors (www.alsd.com).

According to *SportsBusiness Journal's 2013 Resource Guide & Fact Book*, the sports concessions business is distributed by vendor marketshare as follows:

	General	Premium
• Aramark (www.aramark.com):	26.7%	20.2%
• Levy Restaurants (www.levyrestaurants.com):	25.8%	33.9%
• Delaware North Sportservice (www.delawarenorth.com/sportservice-home.aspx):	20.0%	16.1%
• Centerplate (www.centerplate.com):	16.7%	12.9%
• Legends Hospitality Management (www.legendshm.com):	2.5%	2.4%
• Savor (www.savor.com):	2.5%	2.4%
• Ovations (www.ocfair.com/ovations/):	1.7%	1.8%
• Sodexho (www.sodexhousa.com):	0.8%	0.8%
• Others:	3.3%	8.7%

23.2 Overview

Food courts at many professional sports stadiums and arenas have gone upscale, and many fans look forward to a meal at a game – rather than avoid stadium fare as in years past. The following are some examples:

- At the plaza level of American Airlines Arena in Miami, Bongos Cuban Café, owned by Gloria and Emilio Estefan, offers a unique blend of authentic Cuban cuisine.
- At EverBank Field, home of the Jacksonville Jaguars, Wolfgang Puck Grand Cafe showcases the eclectic dishes and homemade Austrian classics that made Chef Puck famous.

- At Yankee Stadium, NYY Steak, an upscale steakhouse, and Hard Rock Cafe are among the food options. Celebrity chefs will occasionally make appearances at the ballpark's restaurants and help prepare food for fans in premium seating.
- At the Palace of Auburn Hills, home of the Detroit Pistons, the Palace Grille offers elegant dining for up to 250 patrons and includes a lounge area for enjoying cocktails and refreshments before or after events.

Hot dogs remain a favorite at ball parks. The Hot Dog & Sausage Council (www.hot-dog.org) estimated that 20.5 million hot dogs were consumed in major league stadiums during the 2012 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
- Dodger Stadium (Los Angeles Dodgers): 1.4 million

24

FOOD TRUCKS

24.1 Profile

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.

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

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

24.2 Overview

Local regulation of food trucks varies. In some cities trucks must be tethered to pods or parked in designated lots. In others, food trucks can freely cruise and set-up almost anywhere the operators choose.

> **"New Orleans, for example, requires mobile food vendors to change locations after 45 minutes in one spot. Among other restrictions, Chicago's food trucks have had to fight to cook onboard, Washington DC's are technically supposed to vacate once their line of clients clears, LA's have to park within 200 feet of a bathroom where workers can wash hands, New York's got booted from Midtown, and in cities like Atlanta and Austin, trucks have largely been relegated to group parks."**
>
> *The Daily Meal*, 11/13/12

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

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.

The growth of the segment in the cities where the concept pioneered suggests that food trucks are more than a passing fad.

- The first L.A. Street Food Fest was held in downtown Los Angeles in 2010. The 3rd annual event, held in July 2012, attracted several thousand people who waited in line for up an hour for meals served by 30 food trucks.
- Portland, Oregon, has an estimated 600 carts in operation. Some operators have applied for liquor licenses.
- Over 500 food trailers operate in Austin. Most operate from one of more than a dozen food trailer parks that have been designated throughout the city and its suburbs. Most parks are set up with common seating areas and provide power and water facilities for the trucks.

“A year ago, editorial pushback on the trend indicated a peak. Instead, it increased twofold in cities like St. Louis and Boston, while on tested asphalt in Los Angeles and New York, its presence strengthened. Food trucks are here to stay.”

The Daily Meal, 11/13/12

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.

Several restaurant chains including Dairy Queen, Gold Star Chili, Qdoba Mexican Grill, and Sizzler 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.

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.

25

MALL-BASED RESTAURANTS & FOOD COURTS

25.1 Profile

According to the International Council of Shopping Centers (ICSC, www.icsc.org), mall food court sales are $512 per sq. ft., down from a peak of $541 per sq. ft. in 2007 but greater than the average revenue of $373 per sq. ft. for all mall tenants. In fact, foodservice is the second most lucrative segment of non-anchor tenants. By category type, revenue is $777 per sq. ft. for food court tenants, $497 per sq. ft. for other fast-food vendors, and $446 per sq. ft. for restaurants.

25.2 Overview

According to the ICSC, shoppers that visit a mall for less than 30 minutes spend an average of $54.20, or 44% less than the overall average mall spend of $98.40. Shoppers whose mall visits last 180 minutes or longer spent $205.20 per visit, or 52% more than the average.

Shoppers spend an average of 45 minutes more in the mall if there are food options.

Approximately 7% of shoppers go to malls specifically for food. According to Guy Mercurio, Vice President at Macerich Co., 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.

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

One example of the new breed of mall dining is the Dining Deck at Santa Monica Place, a 30-year-old mall just blocks from the beach. Full-service restaurants share space with a food court that includes local fast-casual chains and a farmers market-like gathering of food purveyors. Live music is played in the evening, and diners can enjoy a sunset to the west or view the lights of the city skyline to the east.

At the renovated dining terrace at Century City, in Los Angeles, seating ranges from soft couches to counters to tables, with smaller versions designed for kids. Dine-in meals are served on china with glassware and silverware. The mall experienced close to double-digit sales increases during the 24-months following the remodel.

25.3 Market Resources

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

26

PIZZA

26.1 Profile

The pizza industry is a $40 billion-a-year business, according to the National Association of Pizza Operators (NAPO, www.napo.com), with over 5.5 million pizzas sold in the United States in 2012.

According to *Pizza Today*, published by NAPO, independents control about 46% of the market.

Eleven (11) pizza chains ranked among the 200 largest U.S. restaurant chains in 2012, according to *Nation's Restaurant News*. Their combined sales were $15.22 billion; they operated 23,113 units.

26.2 Trends

According to *Pizza Consumer Trend Report*, an April 2012 report by Technomic (www.technomic.com), 41% of consumers eat pizza once a week, an increase from 26% who did so in 2010.

"Consumers increasingly view pizza as the 'go-to' food when they don't feel like cooking. Pizza consumption has increased over the past two years as leading players revamp menus to include more innovative specialty pizzas, gourmet ingredients and items beyond pizza that help operators drive traffic."

Darren Tristano
Executive Vice President
Technomic, 4/11/12

Technomic identifies the following trends in the pizza restaurant segment:

- The latest menu trends call for authenticity, from Neapolitan, Sicilian, and other regional Italian interpretations, to depth-of-flavor preparations, such as hearth-baked, wood-fired, coal, and brick-oven cooking.
- Combo-meat varieties and calzone-style stuffed pizzas stand out as growth areas at limited-service restaurants (LSR). At full-service restaurants, there has been slight growth in the number of veggie/garden and combo-meat pizzas.
- Chicken's adaptability contributes to its widespread use as the top listed protein topping in the full-service segment and third most-frequently listed protein in limited-service, largely due to barbeque and Buffalo chicken varieties.
- Thirty-seven percent (37%) of consumers order pizza from non-pizza limited-service and fast-casual restaurant locations once a month, signaling room for growth for these concepts and a potential threat for LSR pizza chains.
- Forty-nine percent (49%) of consumers are purchasing pizza from a grocery store once a month, making it the second leading foodservice source for pizza, surpassed only by LSR pizza restaurants (71%).
- All foodservice pizza purchases have increased over the past two years, but carryout and dine-in pizza occasions have increased the most; 68% of consumers now order carryout pizza once a month or more, followed by 45% who say they order pizza for dine-in.

Online ordering and increased use of mobile devices is changing ordering patterns for pizza delivery outlets. Online ordering represents 25% of Domino's sales.

The convenience provided by takeout and delivery remains a major driver in the pizza marketplace. Seventy percent (70%) of Domino's business is delivery.

Several pizza chains operating in a fast-casual format have recently launched. These include Pie Five Pizza Co. (The Colony, TX), Top That! Pizza (Tulsa, OK), and Uncle Maddio's Pizza (Atlanta, GA). They join established fast-casual chains Brixx Wood Fired Pizza, Donatos Pizza, Fazoli's, Jerry's Subs & Pizza, RedBrick Pizza, Straw Hat Pizza, The Loop Pizza Grill, and zpizza.

"Fast-casual pizza is birthing as a category."

Nation's Restaurant News, 3/5/12

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.

27

QUICK-SERVICE RESTAURANTS

27.1 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.

> **"The 15 [largest] burger chains generated $67.99 billion in domestic net sales last year, representing 71.5% of the segment's total."**
>
> *Nation's Restaurant News*, 6/25/12

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%.

27.2 Overview

Visits to quick-service restaurants generally hold up better throughout economic downturns than any other segment. However, competition from the fast-casual segment hindered growth during the Great Recession and prolonged recovery.

"They're chasing the fast-casual segment. That's exactly what's going on. We've been tracking fast-food for well over 30 years, and during every period of recession and economic downturn, fast-food has never experienced this kind of poor performance for this long a period of time. In 2009 the sector experienced negative growth, then leveled off. It's not growing, nor is it forecasted to grow."

Bonnie Riggs, Analyst
The NPD Group, 1/23/13

A comparison of QSRs and fast-casual restaurants is presented in Section 20.3 of this handbook.

The following chains experienced the highest net loss in number of units during the prior three years (source: The NPD Group):

- Quiznos: -1,940
- Blimpie: - 343
- Starbucks: - 323
- KFC: - 223
- Domino's Pizza: - 205
- Baskin Robbins: - 203
- Dairy Queen: - 183
- Arby's: - 153
- Long John Silvers: - 153
- Pizza Hut: - 143

Despite the harsh market conditions, the following chains experienced significant unit growth during the period:

- Subway: 2,691
- Wingstreet: 1,739
- Little Caesars: 826
- Dunkin' Donuts: 792
- Taco Bell: 259
- Papa John's: 243

27.3 The QSR Customer

Understanding Quick-Service Restaurants and Their Customers, an October 2012 report by Technomic (www.technomic.com), provides the following profile of QSR customers:

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

A June 2012 study by Sandelman & Associates assessed metropolitan areas for quick-service dining frequency. The following metropolitan areas are identified as having the highest percentages of adults who eat fast-food 20 or more times per month:

- Dallas, TX: 34.0%
- McAllen, TX: 33.1%
- Providence, RI: 31.5%
- Memphis, TN: 31.1%
- Greensboro, NC: 30.5%
- Charleston/Huntington, WV: 30.4%
- Lexington, KY: 30.0%
- Columbia, SC: 29.8%
- Houston, TX: 29.8%
- Greenville, SC: 29.8%

The following metropolitan areas are identified as having the highest percentages of adults who do not eat fast-food at all:

- Monterey/Salinas, CA: 19.4%
- Eugene, OR: 17.4%
- Hartford, CT: 17.4%
- West Palm Beach, FL: 17.2%
- Boston, MA: 16.5%
- Providence, RI: 16.5%
- Syracuse, NY: 16.5%
- Anchorage, AK: 16.1%
- San Francisco, CA: 15.7%
- Albany, NY: 15.6%

According to The NPD Group, multi-daypart customers – those who visit a QSR for more than one meal – account for a disproportionately high percentage of sales. While multi-daypart buyers comprise 21% of QSR customers, they account for 35% of visits. They visit a QSR 4.6 times monthly, on average, while single-daypart customers average 2.2 visits. The following is a distribution of multi-daypart customer traffic (source: The NPD Group):

- Lunch and supper: 43%
- Morning meal and evening snack: 12%
- Morning meal and lunch: 11%
- Three or more dayparts: 11%
- Lunch and evening snack: 7%
- Supper and evening snack: 7%
- Morning meal and supper: 5%

28

SNACKS

28.1 Profile

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.

The National Restaurant Association (www.restaurant.org) forecasts snack shop and nonalcoholic beverage bar sales at $29.06 billion for 2013, a 4.3% increase over 2012. Coffeeshops (see Chapter 16) account for almost half of the total.

28.2 Overview

According to *Snacking Occasion Consumer Trend Report*, published in March 2012 by Technomic (www.technomic.com), 48% of consumers say they snack at least twice a day, an increase from 25% who did so in 2010. 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.

"Recent consumer research indicates that snacking is becoming a larger part of consumers' daily lives. Pressure from the nutritional disclosure legislation has prompted the foodservice industry to reduce calorie counts in meals. As a result, Americans are now more inclined to 'graze' throughout the day, seeking snacks that provide fuel between traditional meal parts."

Darren Tristano
Executive Vice President
Technomic, 3/12/12

Restaurants garnered 22% of consumers' snacking occasions in 2012, an increase from 17% in 2010, according to Technomic.

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.

> **"Habits of around-the-clock eating, the street-food/food-truck craze, consumers' demand for flexible portions and prices, and operators' need to move beyond price-cutting on core menu items all combine to make snack fare a key trend. Tapas, mezze, and upscale bar bites in full-service restaurants are matched by flavorful novelties in limited-service restaurants, from Spicy Chicken McBites at McDonald's and Chicken Littles at KFC to mini corn dogs at Jack in the Box and cheesecake bites at Sonic."**
>
> Technomic, 11/19/12

28.3 Trends

Until recently the juice bar category included only a handful of small independents across the country. Among them are Daily Juice (Austin, TX), Daily Kitchen & Wellness Bar (Las Vegas, NV), Earthbar (Los Angeles, CA), Kreation Kafe (Los Angeles, CA), Liquiteria (New York, NY), Moon Juice (Los Angeles, CA), and Puree Artisan Juices (Washington, DC).

"The new wave of fresh-juice bars caters to a growing audience of health-minded consumers who don't have the time or equipment to grind and press their own mangos, açai berries, or wheatgrass at home. Small independent operations are opening all over the country with a modern take on juice, targeting a crowd that sees traditional smoothie chains – and those offered at some quick-service chains – as less healthful."

Nation's Restaurant News, 2/6/12

The fresh juice bar concept is on the rise. In 2012, Starbucks announced plans to unveil a new juice bar concept. Juice It Up!, a 90-unit smoothie chain, began retrofitting its stores to add fresh-squeezed juice options.

29

SUPERMARKET FOODSERVICE

29.1 Profile

According to the International Dairy Deli Bakery Association (www.iddba.org), prepared food sales at U.S. supermarkets are approximately $6 billion annually.

Technomic (www.technomic.com) estimates that sales of prepared food in supermarkets are increasing at about 7% annually.

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%

Prepared foods from supermarkets are part of the overall market dubbed 'retail meal solutions' (RMS). According to Technomic, retail meal solutions are a $37 billion market, which includes $10 billion in beverage sales. The category also includes frozen entrèes 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.

29.2 Overview

Most supermarkets provide an in-store area where customers can eat prepared foods. Some stores have taken the concept a step further. The following are examples:

- Many Whole Foods stores feature hot and cold buffet lines, chefs at cooking stations, and pizza ovens, along with expanded dining areas. The 59,000-square-foot Whole Foods store at the Time Warner Center in New York City has a sleek 300-seat dining area. Some Whole Food locations even have live music in the dining area on the weekends.
- Epicure Gourmet Market (Sunny Isles, Florida) has a full-service bar and outdoor patio with umbrella-shaded tables for customers.

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

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

29.3 Trends

According to *Retailer Meal Solutions Consumer Trend Report*, published in January 2013 by Technomic, 38% of consumers say that they purchase RMS from traditional supermarkets each week, a decline from 42% who did so in 2010.

> **"At the height of the economic downturn, many consumers flocked to supermarkets, mass merchandisers, warehouse clubs and other retailers, looking for a deal on prepared foods. But now that the economy is recovering from the recession ... these consumers may be reversing the patterns they set a couple of years ago by heading back to restaurants. For retailers to gain or maintain their share of foodservice dollars, they'll need to clearly stand out from restaurants."**
>
> Darren Tristano
> Executive Vice President
> Technomic, 1/29/13

The following are other findings of the Technomic report:

- Among those who purchase RMS at least once a month, 43% do so four or more times per month.
- Opportunities exist for retailers to leverage their customization options to compete with restaurants; only 38% of consumers say that retail prepared foods allow for more customization than food purchased from a restaurant.

- While half of consumers think the quality of prepared foods has greatly improved since 2010, 40% say they would like to see more name-brand foods that typically denote a higher quality perception.

PART V: MARKET LEADERS

30

LARGEST BAKERY CAFE CHAINS

30.1 Largest Chains

According to *Top 25 Bakery Cafe Chains Restaurant Report*, by Technomic (www.technomic.com), the following are the largest bakery cafe chains in the U.S.:

- Alonti
- Atlanta Bread Company
- Au Bon Pain
- Bear Rock
- Boudin Bakery
- Boudin San Francisco
- Cafe Carolina and Bakery
- Cafe Express
- Camille's Sidewalk Cafe
- Champagne French Bakery Cafe
- Corner Bakery Cafe
- Crispers Fresh Salads and Such
- Einstein Bros. Bagels
- Europa Café
- Frullati Café & Bakery
- Jazzman's Cafe & Bakery
- La Madeline Country French Cafe
- La Boulanger
- Le Pain Quotidien
- Panera Bread
- Paradise Bakery
- Pax Wholesome Foods
- Sandella's Flatbread Cafe
- Specialty's Café & Bakery
- Wildflower Bread Company

30.2 Market Resources

Top 25 Bakery Cafe Chains Restaurant Report, Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)

31

LARGEST BURGER CHAINS

31.1 Largest Chains

According to *Top 75 Limited-Service Burger Chains Restaurant Report*, published by Technomic (www.technomic.com), the following are the largest limited-service burger chains in the U.S.:

- A&W All-American Food
- Arctic Circle Restaurants
- B-BOP'S
- b.good
- Back Yard Burgers
- Bagger Dave's Legendary Burger Tavern
- Baker's Drive Thru
- Beck's Prime
- Better Burger NYC
- Blake's Lotaburger
- Blazing Onion Burger Company
- Boardwalk Fresh Burgers & Fries
- Bobby's Burger Palace
- Burger Hut Burgers
- Burger King
- Burger Lounge
- Burger Street
- Burgerville
- Canyons Burger Company
- Carl's Jr.
- Central Park USA
- Checkers Drive-In Restaurants
- Cheeseburger Bobby's
- Cheeseburger Charley's
- Culver's
- Elevation Burger
- Energy Kitchen
- Evos'...Feel Great Fast Food
- Farmer Boys
- Fatburger
- Five Guys Burgers and Fries

- Flamers Burgers and Chicken
- Foster’s Grille
- Freddy’s Frozen Custard & Steakburgers
- Fuddruckers
- Good Times Burgers & Frozen Custard
- Hardee’s
- Iceberg Drive Inn
- In-N-Out Burger
- Jack in the Box
- Jack’s
- Jake’s Wayback Burgers
- Johnnie’s Charcoal Broiler
- Johnny’s Lunch
- Jollibee
- Kidd Valley
- Krystal Company
- Larkburger
- M Burger
- Martin’s Restaurants
- McDonald’s
- Meatheads Burgers & Fries
- Mighty Fine Burgers, Fries & Shakes
- Mooyah Burgers & Fries
- New York Burger Co.
- Original Hamburger Stand
- Pal’s Sudden Service
- Rally’s Hamburgers
- Remington Grill
- Schoop’s Hamburgers
- Shake Shack
- Showmars Restaurant
- Smashburger
- Sonic Drive-Ins
- Spangles
- The Counter
- The Habit Burger Grill
- Umami Burger
- Village Burger Bar
- Ward’s Food Systems
- Wendy’s
- Whataburger
- White Castle
- Wild Willy’s Burgers

31.2 Market Resources

Top 75 Limited-Service Burger Chains Restaurant Report, Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)

32

LARGEST FAMILY-DINING CHAINS

32.1 Largest Chains

The following are the largest family-dining chains (source: Technomic):

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

32.2 Market Resources

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

33

LARGEST FAST-CASUAL RESTAURANT CHAINS

33.1 Largest Chains

According to *Top 100 Fast-Casual Chain Restaurant Report*, published by Technomic (www.technomic.com), the following are the largest fast-casual chains in the U.S.:

- Alonti
- Atlanta Bread Company
- Au Bon Pain
- Back Yard Burgers
- Baja Fresh Mexican Grill
- Bajio Mexican Grill
- Boston Market
- Brixx Wood Fired Pizza
- Bruegger's Bagel Bakery
- Buona Beef
- Burgerville
- Cafe Express
- Cafe Rio Mexican Grill
- California Tortilla
- Camille's Sidewalk Cafe
- Chipotle Mexican Grill
- Chop't Creative Salad Company
- Corner Bakery Cafe
- Cosí
- Costa Vida Fresh Mexican Grill
- CPK
- Crispers
- D'Angelo Grilled Sandwiches
- Daphne's Greek Cafe
- Donatos Pizza
- Einstein Bros. Bagels
- El Pollo Loco
- Farmer Boys
- Fatburger
- Fazoli's
- Five Guys Burgers and Fries

- Freebirds World Burrito
- Fuddruckers
- Grand Traverse Pie Company
- Great Wraps
- Jake’s Wayback Burgers
- Jason’s Deli
- Jazzman’s Café & Bakery
- Jerry’s Subs & Pizza
- la Madeleine
- La Salsa Fresh Mexican Grill
- Le Pain Quotidien
- Leeann Chin
- Loving Hut
- McAlister’s Deli
- Moe’s Southwest Grill
- Mr. Pickle’s Sandwich Shop
- Nature’s Table Cafe
- Newk’s Express Cafe
- Noodles & Company
- Panchero’s Mexican Grill
- Panda Express
- Pandini’s
- Panera Bread
- Paradise Bakery & Cafe
- Pat & Oscar’s
- Pei Wei Asian Diner
- Pick Up Stix
- Pollo Campero
- Pollo Tropical
- Portillo’s Hot Dogs
- Pret A Manger
- Qdoba Mexican Grill
- Raising Cane’s Chicken Fingers
- RedBrick Pizza
- Rosa’s Cafe Tortilla Factory
- Rubio’s Fresh Mexican Grill
- Rumbi Island Grill
- Salad Creations
- Saladworks
- Salsarita’s Fresh Cantina
- Sandella’s Flatbread Cafe
- SanSai Japanese Grill
- Schlotzsky’s
- Shane’s Rib Shack

- Sharky's Woodfired Mexican Grill
- Showmars Restaurant
- Smashburger
- Smithfield's Chicken 'N Bar-B-Q
- Specialty's Café & Bakery
- Spicy Pickle
- Straw Hat Pizza
- Taco Bueno
- Taco Cabana
- Taco Del Mar
- The Counter
- The Habit Burger Grill
- The Loop Pizza Grill
- Tijuana Flats
- Wahoo's Fish Taco
- Which Wich?
- Wildflower Bread Company
- Wing Zone
- Wings To Go
- Wingstop
- Wolfgang Puck Express
- Zaxby's
- Zoës Kitchen
- Zoup! Fresh Soup Company
- zpizza

33.2 Market Resources

Top 100 Fast-Casual Chain Restaurant Report, Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)

34

LARGEST MEXICAN RESTAURANT CHAINS

34.1 Largest Chains

According to *Top 50 Limited-Service Mexican Chains Restaurant Report,* by Technomic (www.technomic.com), the following are the largest limited-service Mexican restaurant chains in the U.S.:

- 360 Degree Gourmet Burrito
- Baja Fresh Mexican Grill
- Baja Sol Tortilla Grill
- Bajio Mexican Grill
- Barberitos
- Berryhill Baja Grill
- Bobby Salazar's Mexican Restaurant
- Cafe Rio Mexican Grill
- California Tortilla
- Chipotle Mexican Grill
- Chronic Tacos
- Costa Vida
- Currito :: Burritos Without Borders
- Del Taco
- Desert Moon Fresh Mexican Grille
- El Taco Tote
- Filiberto's Mexican Food
- Freebirds World Burrito
- Green Burrito
- High Tech Burrito
- Jimboy's Tacos
- La Bamba
- La Salsa Fresh Mexican Grill
- Lime Fresh Mexican Grill
- Maui Tacos
- Moe's Southwest Grill
- Panchero's Mexican Grill
- Qdoba Mexican Grill
- Rubio's Fresh Mexican Grill
- Salsarita's Fresh Cantina
- Sharky's Woodfired Mexican Grill

- SuperMex Restaurants
- Surf Taco
- Taco Bell
- Taco Bueno
- Taco Cabana
- Taco Casa
- Taco Del Mar
- Taco Fresco
- Taco John's
- Taco Mayo
- Taco Tico
- TacoTime
- The Taco Maker
- Tijuana Flats
- Tin Star
- Una Mas Mexican Grill
- Wahoo's Fish Taco
- Willy's Mexicana Grill

34.2 Market Resources

Top 50 Limited-Service Mexican Chains Restaurant Report, Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)

35

LARGEST PIZZA CHAINS

35.1 Largest Chains

According to *Top 100 Limited-Service Pizza Chains Report*, by Technomic (www.technomic.com), the following are the largest limited-service pizza chains in the U.S.:

- 5 Buck Pizza
- Abby's Legendary Pizza
- Amato's Pizza
- Ameci Pizza and Pasta
- America's Incredible Pizza Company
- Angilo's Pizza
- Anthony's Pizza and Pasta
- BC Pizza
- Bellacino's Pizza & Grinders
- Blackjack Pizza
- Breadeaúx Pizza
- Brixx Wood Fired Pizza
- Buck's Pizza
- Carbone's Pizzeria
- Cassano's
- Chanello's Pizza
- Chuck E. Cheese's
- CiCi's Pizza
- Cottage Inn Pizza
- CPK ASAP
- Dolly's Pizza
- Domino's Pizza
- Donatos Pizza
- East of Chicago Pizza
- Extreme Pizza
- Famous Famiglia
- Figaro's Italian Pizza
- Fox's Pizza Den
- Garlic Jim's Famous Gourmet Pizza
- Gatti's Pizza
- Gionino's Pizzeria
- Godfather's Pizza

- Greek's Pizzeria
- Gumby's Pizza & Wings
- Happy Joe's Pizza and Ice Cream Parlor
- Happy's Pizza
- Homemade Pizza Co.
- Hungry Howie's Pizza & Subs
- Imo's Pizza
- Izzy's Pizza Bar & Classic Buffet
- Jet's Pizza
- John's Incredible Pizza Company
- Ledo Pizza
- Little Caesars
- Mamma Ilardo's
- Marco's Pizza
- Mark's Pizzeria
- Mazzio's Italian Eatery
- Mellow Mushroom
- Me-N-Ed's Pizzeria
- Monical's Pizza Restaurant
- Monkey Joe's Parties and Play
- Mountain Mike's Pizza
- Mr. Jim's Pizza
- Nancy's
- New York Pizzeria
- Nick-N-Willy's Pizza
- Papa Gino's Pizzeria
- Papa John's
- Papa Murphy's Take 'N' Bake Pizza
- Papa Romano's
- Papa's Pizza-To-Go
- Pats Pizza Family Restaurants
- Paul Revere's Pizza International
- Peter Piper Pizza
- Pizza Boli's
- Pizza Factory
- Pizza Guy's
- Pizza Hut
- Pizza Inn
- Pizza Joe's
- Pizza Man
- Pizza Patrón
- Pizza Plus
- Pizza Pro
- Pizza Ranch

- Pizza Shoppe & Pub
- Pizzas of Eight
- Puccini's Smiling Teeth Pizza
- Pudge Bros. Pizza
- RedBrick Pizza
- Rocky Rococo
- Rosati's Pizza
- Round Table Pizza
- Samuel Mancino's Italian Eatery
- San Francisco Oven
- Sbarro
- Shakey's Pizza Parlors
- Simple Simon's Pizza
- Snappy Tomato Pizza
- Straw Hat Pizza
- The Loop Pizza Grill
- The Original Pizza Pan
- Toppers Pizza
- Villa Fresh Italian Kitchen
- Vocelli Pizza
- Westshore Pizza
- Wolfgang Puck Express
- Zeppe's Pizzeria
- zpizza

35.2 Market Resources

Top 100 Limited-Service Pizza Chains Report, Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)

36

LARGEST QUICK-SERVICE RESTAURANT CHAINS

36.1 Top Chains

Based on data from Technomic (www.technomic.com), *QSR Magazine* (July 2012) ranked the largest quick-service restaurant (QSR) chains by systemwide sales as follows:

	Systemwide Sales	Sales Per Unit	Total Units (change in 2011)
• McDonald's:	$34.2 billion	$2.50 million	14,098 (71)
• Subway:	$11.4 billion	$ 469,000	24,722 (872)
• Starbucks:	$ 9.75 billion	$1.14 million	10,821 (-310)
• Wendy's:	$ 8.50 billion	$1.46 million	6,594 (18)
• Burger King:	$ 8.40 billion	$1.25 million	7,231 (-33)
• Taco Bell:	$ 7.00 billion	$1.28 million	5,670 (36)
• Dunkin' Donuts:	$ 6.50 billion	$ 850,000	7,015 (115)
• Pizza Hut:	$ 5.50 billion	$ 875,000	7,600 (58)
• KFC:	$ 4.50 billion	$ 940,000	4,780 (-275)
• Chick-fil-A:	$ 4.05 billion	$2.89 million	1,606 (69)
• Sonic Drive-Ins:	$ 3.68 billion	$1.04 million	3,531 (-11)
• Domino's Pizza:	$ 3.44 billion	$ 679,000	4,907 (-22)
• Panera Bread:	$ 3.40 billion	$2.30 million	1,541 (88)
• Arby's:	$ 3.02 billion	$ 854,000	3,437 (-86)
• Jack in the Box:	$ 2.95 billion	$1.33 million	2,221 (15)
• Dairy Queen:	$ 2.66 billion	$ 545,000	6,187 (-26)
• Chipotle Mexican Grill:	$ 2.27 billion	$2.01 million	1,225 (150)
• Papa John's:	$ 2.21 billion	$ 786,000	3,001 (130)
• Hardee's:	$ 2.10 billion	$1.10 million	1,921 (3)
• Popeyes Louisiana Kitchen:	$ 1.72 billion	$1.13 million	1,627 (58)
• Panda Express:	$ 1.57 billion	$1.16 million	1,420 (97)
• Carl's Jr.:	$ 1.50 billion	$1.40 million	1,116 (64)
• Little Caesars:	$ 1.48 billion	$ 465,000	3,518 (305)
• Whataburger:	$ 1.31 billion	$1.80 million	728 (11)
• Five Guys Burgers & Fries:	$ 950,600	$1.16 million	918 (182)
• Quiznos:	$ 921,600	$ 345,000	2,503 (-334)
• Jimmy John's:	$ 895,000	$ 821,800	1,329 (199)
• Church's Chicken:	$ 864,300	$ 698,600	1,212 (-33)
• Zaxby's:	$ 840,000	$1.60 million	540 (26)

• Steak 'n Shake:	$ 823,900	$1.65 million	491 (4)
• Bojangles':	$ 767,400	$1.60 million	506 (21)
• Culver's:	$ 747,100	$1.71 million	444 (20)
• Papa Murphy's:	$ 695,900	$ 559,500	1,283 (42)
• Checkers/Rally's:	$ 669,000	$ 852,000	780 (-18)
• Long John Silver's:	$ 635,000	$ 670,000	932 (-32)
• White Castle:	$ 631,700	$1.25 million	410 (-5)
• Del Taco:	$ 590,700	$1.10 million	532 (10)
• El Pollo Loco:	$ 545,000	$1.43 million	394 (-18)
• Jason's Deli:	$ 534,100	$2.20 million	233 (12)
• Boston Market:	$ 532,000	$1.10 million	481 (-10)
• Krispy Kreme:	$ 531,700	$2.30 million	234 (5)
• Qdoba Mexican Grill:	$ 528,700	$ 961,000	583 (58)
• CiCi's Pizza:	$ 516,000	$ 895,400	573 (-21)
• In-N-Out Burger:	$ 498,500	$1.93 million	266 (14)
• Baskin-Robbins:	$ 495,900	$ 200,000	2,457 (-43)
• Tim Hortons:	$ 473,000	$1.07 million	714 (112)
• Einstein Bros. Bagels:	$ 439,000	$ 884,000	534 (40)
• Captain D's:	$ 433,300	$ 832,000	519 (-12)
• Sbarro:	$ 420,000	$ 690,000	611 (-70)
• Krystal:	$ 404,900	$1.12 million	357 (-7)

36.2 Largest QSR Chains By Category

Ranked by systemwide sales, the largest QSR chains are as follows (source: *QSR Magazine*):

Asian

- Panda Express: $ 1.57 billion

Burgers

- McDonald's: $34.2 billion
- Wendy's: $ 8.50 billion
- Burger King: $ 8.40 billion
- Sonic Drive-In: $ 3.69 billion
- Jack in the Box: $ 2.95 billion
- Dairy Queen: $ 2.66 billion
- Hardee's: $ 2.10 billion
- Carl's Jr.: $ 1.50 billion
- Whataburger: $ 1.31 billion
- Five Guys Burgers & Fries: $ 950 million
- Steak-N-Shake: $ 824 million
- Culver's: $ 747 million
- Checkers/Rally's: $ 670 million

- White Castle: $ 631 million
- In-N-Out Burger: $ 499 million
- Krystal: $ 405 million

Chicken
- KFC: $ 4.50 billion
- Chick-fil-A: $ 4.05 billion
- Popeyes Louisiana Chicken: $ 1.72 billion
- Church's Chicken: $ 864 million
- Zaxby's: $ 840 million
- Bojangles': $ 767 million
- El Pollo Loco: $ 545 million
- Boston Market: $ 532 million

Mexican
- Taco Bell: $ 7.00 billion
- Chipotle Mexican Grill: $ 2.27 billion
- Del Taco: $ 590 million
- Qdoba Mexican Grill: $ 529 million

Pizza/Pasta
- Pizza Hut: $ 5.50 billion
- Domino's Pizza: $ 3.44 billion
- Papa John's: $ 2.21 billion
- Little Caesars: $ 1.48 billion
- Papa Murphy's: $ 696 million
- CiCi's Pizza: $ 516 million
- Sbarro: $ 420 million

Sandwich
- Subway: $11.40 billion
- Panera Bread: $ 3.40 billion
- Arby's: $ 3.02 billion
- Quiznos: $ 922 million
- Jimmy John's: $ 895 million
- Jason's Deli: $ 534 million
- Einstein Bros. Bagels: $ 439 million

Seafood
- Long John Silver's: $ 635 million
- Captain D's: $ 433 million

Snack

- Starbucks: $ 9.75 billion
- Dunkin' Donuts: $ 6.50 billion
- Baskin-Robbins: $ 496 million
- Tim Hortons: $ 473 million

37

LARGEST SANDWICH CHAINS

37.1 Largest Chains

According to *Top 100 Limited-Service Sandwich Chains Report*, by Technomic (www.technomic.com), the following are the largest limited-service sandwich chains in the U.S.:

- Al's Beef
- Andy's Burgers Shakes & Fries
- Apple Spice Junction
- Arby's
- Bain's Deli
- Baker Bros. American Deli
- Big Town Hero
- Biscuitville
- Blimpie Subs & Salads
- Booeymonger Deli
- Buona Beef
- Capriotti's Sandwich Shop
- Charley's Grilled Subs
- City Bites
- Cosí
- Cousins Subs
- Crazy Bowls & Wraps
- D.P. Dough
- D'Angelo Grilled Sandwiches
- El Meson Sandwiches
- Elliott's Off Broadway Deli
- Erbert & Gerbert's
- Erik's DeliCafe
- Extreme Pita
- Firehouse Subs
- Fresh City
- Gandolfo's Deli
- Gold Coast Dogs
- Great Wraps
- Groucho's Deli
- Heidi's Brooklyn Deli

- Hogi Yogi
- Hot Dog on a Stick
- Jason’s Deli
- Jerry’s Subs & Pizza
- Jersey Mike’s Subs
- Jimmy John’s Gourmet Sandwich Shop
- Jody Maroni’s Sausage Kingdom
- Jreck Subs
- Larry’s Giant Subs
- Lenny’s Sub Shop
- Lion’s Choice
- Maid-Rite
- McAlister’s Deli
- Miami Subs Grill
- Milios Sandwiches
- Mr. Goodcents Subs & Pastas
- Mr. Hero
- Mr. Pickle’s Sandwich Shop
- Mr. Pita
- Mr. Subb
- Mr. Submarine’s
- Murphy’s Deli
- Nathan’s Famous
- Obee’s
- Organic To Go
- Penn Station East Coast Subs
- Pepperjax Grill
- Philly Connection
- Pita Pit
- Planet Sub
- Pockets
- Port of Subs
- Portillo’s Hot Dogs
- Potbelly Sandwich Works
- Pret A Manger
- Quiznos
- Rio Wraps Southwestern Grill
- Roly Poly
- Roy Rogers Restaurants
- Runza
- Schlotzsky’s
- Sheetz
- Silver Mine Subs
- Smiling Moose Deli

- Sneaky Pete's Hot Dogs
- Sobik's Subs
- Spicy Pickle
- Steak Escape
- Sub Station II
- Submarina
- Subway
- Sweet Peppers Deli
- Tacone Flavor Grill
- Texadelphia
- The Great Steak & Potato Co.
- Thundercloud Subs
- Togo's Sandwiches
- TooJay's Original Gourmet Deli
- Tubby's Grilled Submarines
- W.G. Grinders
- Wall Street Deli
- Which Wich?
- wichcraft
- Wienerschnitzel
- WindMill Hot Dog
- Zero's Subs
- Zöes Kitchen

37.2 Market Resources

Top 100 Limited-Service Sandwich Chains Report, Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)

38

TOP 200 CHAINS

38.1 Overview

Nation's Restaurant News annually ranks the largest restaurant chains based on U.S. systemwide sales. Systemwide sales include sales from both corporate-owned and franchised locations.

38.2 Largest Chains

The largest restaurant chains, ranked by U.S. systemwide sales, are as follows (source: *Nation's Restaurant News*, June 2012):

	Sales	Units
• McDonald's:	$34.17 billion	14,098
• Subway:	$11.43 billion	24,722
• Starbucks Coffee:	$ 8.49 billion	10,693
• Burger King:	$ 8.13 billion	7,212
• Wendy's:	$ 8.11 billion	5,876
• Taco Bell	$ 7.00 billion	5,670
• Dunkin' Donuts:	$ 5.93 billion	7,015
• Pizza Hut:	$ 5.50 billion	7,600
• KFC:	$ 4.60 billion	4,780
• Applebee's Neighborhood Grill & Bar:	$ 4.43 billion	1,871
• Chick-fil-A:	$ 3.99 billion	1,592
• Sonic Drive-In:	$ 3.69 billion	3,561
• Olive Garden:	$ 3.59 billion	784
• Chili's Grill & Bar:	$ 3.56 billion	1,283
• Domino's Pizza:	$ 3.44 billion	4,907
• Panera Bread:	$ 3.20 billion	1,432
• Jack in the Box:	$ 2.95 billion	2,221
• Arby's	$ 2.94 billion	3,455
• Dairy Queen:	$ 2.66 billion	4,488
• Red Lobster:	$ 2.63 billion	675
• IHOP:	$ 2.62 billion	1,514
• Denny's	$ 2.33 billion	1,593
• Outback Steakhouse	$ 2.33 billion	775
• Chipotle Mexican Grill:	$ 2.26 billion	1,283
• Papa John's Pizza:	$ 2.20 billion	3,001

• Buffalo Wild Wings Grill & Bar:	$ 2.04 billion	813
• Cracker Barrel Old Country Store:	$ 1.93 billion	603
• Hardee's	$ 1.91 billion	1,695
• T.G.I. Friday's:	$ 1.82 billion	555
• 7-Eleven:	$ 1.77 billion	6,497
• Popeyes Louisiana Kitchen:	$ 1.70 billion	1,627
• Golden Corral:	$ 1.68 billion	482
• The Cheesecake Factory:	$ 1.55 billion	156
• Panda Express:	$ 1.53 billion	1,421
• Disney (theme parks, hotels & resorts):	$ 1.45 billion	27
• Little Caesars Pizza:	$ 1.43 billion	3,455
• Carl's Jr.:	$ 1.40 billion	1,116
• Ruby Tuesday:	$ 1.37 billion	761
• Texas Roadhouse:	$ 1.36 billion	362
• Whataburger:	$ 1.31 billion	728
• Marriott Hotels & Resorts:	$ 1.28 billion	322
• Red Robin Gourmet Burgers & Spirits:	$ 1.23 billion	445
• Hilton Hotels:	$ 1.22 billion	254
• LongHorn Steakhouse:	$ 1.12 billion	385
• Jimmy John's:	$ 1.01 million	1,329
• Waffle House:	$ 960 million	1,603
• Bob Evans Restaurants:	$ 960 million	565
• Five Guys Burgers and Fries:	$ 951 million	918
• P.F. Chang's China Bistro:	$ 930 million	206
• Sheraton Hotels:	$ 916 million	190
• Church's Chicken:	$ 864 million	1,217
• Hooters:	$ 852 million	369
• Holiday Inn:	$ 851 million	2,350
• Quiznos:	$ 849 million	2,326
• Zaxby's	$ 840 million	540
• Steak n Shake:	$ 791 million	489
• Bojangles' Famous Chicken 'n Biscuits:	$ 767 million	506
• Culver's:	$ 748 million	444
• Long John Silver's:	$ 705 million	935
• Papa Murphy's Take 'N' Bake Pizza:	$ 696 million	1,283
• Perkins Restaurant and Bakery:	$ 689 million	412
• Carrabba's Italian Grill:	$ 686 million	232
• California Pizza Kitchen:	$ 681 million	223
• Logan's Roadhouse:	$ 661 million	227
• Romano's Macaroni Grill:	$ 655 million	198
• BJ's Rest. & Brewery/Brewhouse/Pizza & Grill:	$ 621 million	115
• In-N-Out Burger:	$ 596 million	266
• Del Taco:	$ 590 million	532
• Hyatt Hotels:	$ 575 million	131

- Circle K: $ 566 million 3,824
- Friendly's Ice Cream: $ 560 million 411
- El Pollo Loco: $ 558 million 394
- Costco: $ 552 million 425
- Jason Deli: $ 540 million 235
- O'Charley's: $ 533 million 227
- Boston Market: $ 532 million 481
- Krispy Kreme Doughnuts: $ 532 million 234
- Wawa: $ 530 million 574
- Qdoba Mexican Grill: $ 529 million 583
- White Castle: $ 528 million 416
- CiCi's Pizza: $ 516 million 573
- Casey's General Stores: $ 500 million 1,699
- Baskin-Robbins: $ 497 million 2,457
- Famous Dave's: $ 492 million 187
- Tim Hortons: $ 479 million 714
- Ruth's Chris Steak House: $ 476 million 116
- Target Cafe (Target Stores): $ 474 million 1,719
- Westin Hotels & Resorts: $ 470 million 100
- Bonefish Grill: $ 459 million 158
- Sheetz: $ 448 million 406
- Jamba Juice: $ 439 million 750
- Cheddars: $ 438 million 106
- Einstein Bros. Bagels: $ 436 million 626
- Captain D's Seafood: $ 433 million 519
- Checkers: $ 430 million 485
- Sbarro, The Italian Eatery: $ 424 million 611
- Krystal: $ 412 million 359
- Chuck E. Cheese's: $ 407 million 529
- Big Boy Restaurants/Frisch's Big Boy: $ 404 million 249
- On the Border Mexican Grill & Cantina: $ 392 million 146
- Maggiano's Little Italy: $ 387 million 101
- McAllister's Deli: $ 384 million 305
- Auntie Anne's Hand-Rolled Soft Pretzels: $ 383 million 913
- Moe's Southwest Grill: $ 381 million 442
- Wingstop: $ 374 million 489
- Cold Stone Creamery: $ 366 million 1,086
- Mimi's Café: $ 364 million 145
- Ryan's Grill Buffett & Bakery: $ 362 million 162
- Round Table Pizza: $ 357 million 444
- Joe's Crab Shack: $ 350 million 119
- Shoney's: $ 333 million 214
- Harrah's: $ 324 million 16
- Village Inn: $ 323 million 213

- DoubleTree Hotel & Guest Suites: $ 322 million 220
- Ramada Inn: $ 318 million 493
- Au Bon Pain: $ 317 million 192
- The Capital Grille: $ 317 million 46
- Barnes & Noble Cafe: $ 313 million 691
- HomeTown Buffet: $ 313 million 117
- Pei Wei Asian Diner: $ 312 million 172
- Uno Chicago Grill/Pizzeria Uno: $ 310 million 140
- Taco John's: $ 310 million 414
- Old Country Buffet: $ 307 million 103
- Noodles & Company: $ 297 million 284
- McCormick & Shmick's: $ 291 million 77
- Baja Fresh Mexican Grill: $ 289 million 244
- Firehouse Subs: $ 285 million 477
- Morton's, The Steakouse: $ 279 million 70
- Benihana of Tokyo: $ 276 million 74
- Carino's Italian: $ 274 million 138
- Ninety Nine Restaurant & Pub: $ 272 million 105
- Taco Cabana: $ 271 million 163
- Sizzler: $ 270 million 159
- Dave & Buster's: $ 267 million 57
- Hungry Howie's Pizza: $ 267 million 546
- Sam's Café: $ 267 million 600
- Radisson Hotels & Resorts: $ 263 million 105
- Yard House: $ 262 million 35
- Corner Bakery Cafe: $ 261 million 129
- Jersey Mike's Subs: $ 255 million 507
- Fuddruckers: $ 252 million 175
- Caribou Coffee: $ 251 million 486
- Schlotzky's Deli: $ 249 million 337
- Houlihan's: $ 248 million 86
- Potbelly Sandwich Works/Shop: $ 244 million 234
- Wyndham Hotels & Resorts: $ 244 million 69
- Sonny's Real Pit Bar-B-Q: $ 243 million 127
- Buca di Beppo: $ 240 million 86
- Rally's Hamburgers: $ 239 million 300
- Fleming's Prime Steakhouse & Wine Bar: $ 239 million 164
- Godfather's Pizza: $ 239 million 64
- The Melting Pot: $ 233 million 141
- Luby's Cafeteria: $ 232 million 96
- Old Chicago: $ 232 million 99
- Huddle House: $ 232 million 394
- Six Flags Theme Parks: $ 226 million 16
- Braum's Ice Cream & Dairy Stores: $ 223 million 279

- Charley's Grilled Subs: $ 218 million 397
- Wienerschnitzel: $ 218 million 334
- Champps Americana: $ 216 million 59
- Rainforest Café: $ 216 million 25
- Johnny Rockets: $ 213 million 223
- Pollo Tropical Chicken: $ 212 million 94
- Portillo's Hot Dogs: $ 211 million 34
- Legal Sea Foods: $ 210 million 31
- Raising Cane's Chicken Fingers: $ 210 million 119
- Fazolis: $ 207 million 218
- Taco Bueno: $ 207 million 184
- Bruegger's Bagel Bakery: $ 205 million 292
- Chevys Fresh Mex: $ 205 million 74
- Sweet Tomatoes: $ 204 million 81
- Bertucci's Brick Oven Pizzeria: $ 204 million 95
- Brio Tuscan Grille: $ 203 million 45
- A&W All American Food: $ 200 million 773
- Marie Callender's Restaurant & Bakery: $ 197 million 83
- Lone Star Steakhouse & Saloon: $ 196 million 106
- Beef 'O' Brady's Family Sports Pub: $ 194 million 210
- Rubio's Fresh Mexican Grill: $ 188 million 200
- Saltgrass Steak House: $ 188 million 47
- Hard Rock Cafe: $ 183 million 43
- Piccadilly Cafeteria: $ 182 million 87
- Sarku Japan/Sushi Bar/Teriyaki & Sushi Express: $ 179 million 203
- Elephant Bar Restauant: $ 177 million 47
- Smokey Bones Bar & Fire Grill: $ 176 million 66
- Omni Hotels: $ 176 million 44
- Ponderosa Steakhouse: $ 175 million 138
- Claim Jumper: $ 172 million 37
- Eat'n Park: $ 171 million 72
- El Torito: $ 170 million 66
- Houston's: $ 168 million 19
- Donatos Pizza/Pizzeria: $ 166 million 156
- Dickey's Barbecue Pit: $ 165 million 235
- Coco's: $ 162 million 121
- Bravo! Cucina Italiana: $ 162 million 47
- Così: $ 158 million 132
- J. Alexander's: $ 157 million 33
- Peet's Coffee & Tea: $ 156 million 196
- Shari's Restaurants: $ 155 million 103
- Bahama Breeze: $ 155 million 30
- Bubba Gump Shrimp Co.: $ 154 million 23

39

TOP CHAINS BY SEGMENT

39.1 Overview

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

- Bakery-Cafe
- Buffet
- Casual-Dining
- Chicken
- Coffee/Snack
- Family-Dining
- Hotels
- Pizza
- Sandwiches

38.2 Segment Assessment

The following are the largest restaurant chains by segment (source: *Nation's Restaurant News*, June 2012):

	Systemwide Sales	Units
Bakery-Cafe		
• Panera Bread:	$ 3.20 billion	1,432
• Tim Hortons:	$ 479 million	714
• Einstein Bros. Bagels:	$ 436 million	626
• Au Bon Pain:	$ 317 million	192
• Corner Bakery Café:	$ 261 million	129
• Bruegger's Bagel Bakery:	$ 205 million	292
Buffet		
• Golden Corral:	$ 1.68 billion	482
• Ryan's Grill, Buffet & Bakery:	$ 362 million	162
• HomeTown Buffet:	$ 313 million	117
• Old Country Buffet:	$ 307 million	103
• Sizzler:	$ 270 million	159
• Sweet Tomatoes:	$ 204 million	81
• Ponderosa Steakhouse:	$ 175 million	138

Casual-Dining

• Applebee's Neighborhood Grill & Bar:	$ 4.43 billion	1,871
• Chili's Grill & Bar:	$ 3.56 billion	1,283
• Olive Garden:	$ 3.59 billion	784
• Red Lobster:	$ 2.63 billion	675
• Outback Steakhouse:	$ 2.33 billion	775
• Buffalo Wild Wings Grill & Bar:	$ 2.04 billion	813
• T.G.I. Friday's:	$ 1.82 billion	555
• The Cheesecake Factory:	$ 1.55 billion	156
• Ruby Tuesday:	$ 1.36 billion	761
• Texas Roadhouse:	$ 1.36 billion	362
• Red Robin Gourmet Burgers & Spirits:	$ 1.23 billion	445
• LongHorn Steakhouse:	$ 1.12 billion	385
• P.F. Chang's China Bistro:	$ 930 million	206
• Hooters:	$ 852 million	369
• Romano's Macaroni Grill:	$ 655 million	198
• Carrabba's Italian Grill:	$ 686 million	232
• Logan's Roadhouse:	$ 661 million	227
• O'Charley's:	$ 532 million	227
• BJ's Rest. & Brewery/Brewhouse/Pizza & Grill:	$ 621 million	115
• Famous Dave's:	$ 476 million	187
• Ruth's Chris Steak House:	$ 476 million	116
• Bonefish Grill:	$ 459 million	158
• On the Border Mexican Grill & Cantina:	$ 392 million	146
• Maggiano's Little Italy:	$ 387 million	101
• Mimi's Cafe:	$ 364 million	145
• Joe's Crab Shack:	$ 350 million	119
• The Capital Grille:	$ 317 million	46
• Uno Chicago Grill/Pizzeria Uno:	$ 310 million	140
• McCormick & Schmick's:	$ 291 million	79
• Morton's The Steakhouse:	$ 279 million	70
• Benihana of Tokyo:	$ 276 million	74
• Carino's Italian:	$ 274 million	138
• Ninety Nine Restaurant & Pub:	$ 272 million	105
• Dave & Buster's:	$ 267 million	57
• Fuddruckers:	$ 252 million	175
• Houlihan's:	$ 248 million	86
• Buca di Beppo:	$ 240 million	86
• Fleming's Prime Steakhouse & Wine Bar:	$ 239 million	164
• Old Chicago:	$ 234 million	99
• Rainforest Café:	$ 216 million	25
• Champps Americana:	$ 212 million	59
• Yard House:	$ 212 million	35

• Legal Sea Foods:	$	210 million	31
• Chevy's Fresh Mex:	$	205 million	74
• Lone Star Steakhouse & Saloon:	$	196 million	106
• Marie Callender's Restaurant & Bakery:	$	196 million	83
• Beef 'O' Brady's Family Sports Pub:	$	194 million	210
• Claim Jumper:	$	172 million	37
• El Torito:	$	170 million	66

Chicken

• KFC:	$	4.60 billion	4,780
• Chick-fil-A:	$	3.99 billion	1,592
• Popeyes Louisiana Kitchen:	$	1.60 billion	1,580
• Church's Chicken:	$	864 million	1,217
• Zaxby's	$	840 million	540
• Bojangles' Famous Chicken 'n Biscuits:	$	767 million	506
• El Pollo Loco:	$	552 million	425
• Boston Market:	$	532 million	481
• Wingstop:	$	374 million	489
• Pollo Tropical Chicken on the Grill:	$	211 million	94

Coffee/Snack

• Starbucks Coffee:	$	8.49 billion	10,693
• Dunkin' Donuts:	$	5.93 billion	7,015
• Krispy Kreme Doughnuts:	$	432 million	234
• Baskin-Robbins:	$	497 million	2,457
• Jamba Juice:	$	439 million	750
• Auntie Anne's Hand-Rolled Soft Pretzels:	$	383 million	913
• Cold Stone Creamery:	$	366 million	1,086
• Caribou Coffee:	$	251 million	486

Family-Dining

• IHOP:	$	2.62 billion	1,514
• Denny's:	$	2.33 billion	1,593
• Cracker Barrel Old Country Store:	$	1.93 billion	603
• Bob Evans Restaurants:	$	960 million	565
• Waffle House:	$	960 million	1,603
• Steak 'n Shake:	$	791 million	489
• Perkins Restaurant and Bakery:	$	689 million	412
• Friendly's Ice Cream:	$	560 million	411
• Big Boy Restaurants/Frisch's Big Boy:	$	404 million	249
• Shoney's:	$	333 million	214
• Village Inn:	$	323 million	213
• Sonny's Real Pit Bar-B-Q:	$	243 million	127
• Huddle House:	$	232 million	394

• Eat'n Park:	$ 171 million	72
• Coco's:	$ 162 million	121
• Shari's Restaurants:	$ 155 million	103

Hotels

• Marriott Hotels & Resorts:	$ 1.28 billion	322
• Hilton Hotels:	$ 1.22 billion	254
• Sheraton Hotels:	$ 916 million	190
• Holiday Inn:	$ 851 million	2,350
• Hyatt Hotels:	$ 575 million	131
• Westin Hotels & Resorts:	$ 470 million	100
• Harrah's:	$ 324 million	16
• DoubleTree Club & Guest Suites:	$ 322 million	220
• Ramada Inn:	$ 318 million	493
• Radisson Hotels & Resorts:	$ 263 million	105
• Wyndham Hotels and Resorts:	$ 244 million	69

Pizza

• Pizza Hut:	$ 5.50 billion	7,600
• Domino's Pizza:	$ 3.44 billion	4,907
• Papa John's Pizza:	$ 2.20 billion	3,001
• Little Caesars Pizza:	$ 1.43 billion	3,455
• Papa Murphy's Take 'N' Bake Pizza:	$ 696 million	1,283
• California Pizza Kitchen:	$ 681 million	223
• CiCi's Pizza:	$ 516 million	573
• Chuck E. Cheese's:	$ 407 million	529
• Round Table Pizza:	$ 357 million	444
• Hungry Howie's Pizza:	$ 267 million	546
• Godfather's Pizza:	$ 239 million	619
• Donatos Pizza:	$ 166 million	156

Sandwiches

• McDonald's:	$34.17 billion	14,098
• Subway:	$11.43 billion	24,722
• Burger King:	$ 8.13 billion	7,212
• Wendy's:	$ 8.13 billion	5,876
• Taco Bell:	$ 7.00 billion	5,670
• Sonic Drive-In:	$ 3.61 billion	3,561
• Jack in the Box:	$ 2.95 billion	2,221
• Arby's:	$ 2.94 billion	3,555
• Dairy Queen:	$ 2.66 billion	4,588
• Chipotle Mexican Grill:	$ 2.26 billion	1,283
• Hardee's:	$ 1.91 billion	1,695
• Carl's Jr.:	$ 1.40 billion	1,116

• Whataburger:	$ 1.33 billion	728
• Jimmy John's:	$ 1.01 billion	1,329
• Five Guys Burgers and Fries:	$ 951 million	918
• Quiznos:	$ 840 million	2,326
• Culver's:	$ 748 million	444
• In-N-Out Burger:	$ 596 million	266
• Del Taco:	$ 579 million	532
• Jason Deli:	$ 540 million	235
• White Castle:	$ 528 million	416
• Qdoba Mexican Grill:	$ 429 million	583
• Checkers:	$ 430 million	485
• Krystal:	$ 411 million	359
• McAlister's Deli:	$ 384 million	305
• Moe's Southwest Grill:	$ 381 million	442
• Taco John's:	$ 310 million	414
• Baja Fresh Mexican Grill:	$ 289 million	244
• Firehouse Subs:	$ 285 million	477
• Taco Cabana:	$ 271 million	163
• Jersey Mike's Subs:	$ 255 million	507
• Schlotzsky's Deli:	$ 249 million	337
• Potbelly Sandwich Works:	$ 244 million	234
• Rally's Hamburgers:	$ 239 million	300
• Braum's Ice Cream & Dairy Stores:	$ 223 million	279
• Wienerschnitzel:	$ 218 million	334
• Johnny Rockets:	$ 213 million	223
• Taco Bueno:	$ 207 million	184
• A&W All American Food:	$ 200 million	773
• Rubio's Fresh Mexican Grill:	$ 188 million	200

40

TOP FOODSERVICE DISTRIBUTORS

40.1 Ranking By Annual Sales

The largest foodservice distributors, ranked by 2011 (most recent data available) sales, are as follows (source: Technomic [www.technomic.com]):

• Sysco Corp.:	$39.32 billion
• US Foods:	$20.00 billion
• Performance Food Group*:	$12.50 billion
• Gordon Food Service:	$ 8.60 billion
• Reinhart Foodservice*:	$ 4.54 billion***
• Maines Paper & Food Service:	$ 3.08 billion
• Ben E. Keith Foods:	$ 3.08 billion
• Services Group of America:	$ 2.75 billion
• Shamrock Foods Co.:	$ 2.11 billion
• Labatt Food Service:	$ 1.00 billion
• Cheney Brothers Inc.:	$ 1.00 billion
• Glazier Foods:	$ 541 million***
• Merchants Foodservice:	$ 375 million

* acquired IFH - Institution Food House
** acquired Agar Supply Co. Inc.
*** 2010 revenue, most recent available

40.2 Market Resources

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

41

TOP FRANCHISED BRANDS

41.1 Number of Franchised Units

According to Franchising.com (www.franchising.com), the following were the largest franchised restaurant brands at year-end 2012:

	Multi-Unit Franchisees	Total Franchises
• Subway:	3,866	8,062
• McDonald's:	2,185	2,792
• Southern Tsunami:	792	1,720
• Dunkin' Donuts:	778	1,377
• Burger King:	609	1,088
• Little Caesars Pizza:	585	680
• Quiznos:	348	2,106
• Papa John's Pizza:	328	362
• Taco Bell:	324	609
• Arby's:	256	419
• Dunkin' Donuts/Baskin-Robbins:	252	565
• DQ Grill & Chilll/Dairy Queen Grill & Chill:	252	1,268
• Sonic Drive-In:	237	559
• Papa Murphy's:	233	554
• Cold Stone Creamery:	215	723
• Jimmy John's:	213	452
• Firehouse Subs:	183	202
• Baskin-Robbins:	172	740
• Popeyes Louisiana Kitchen:	167	553
• Zaxby's:	145	161

41.2 Market Resources

Franchising.com, 634 N. Santa Cruz Avenue, Suite 200, Los Gatos, CA 95030. (408) 402-5681. (www.franchising.com)

42

TOP RESTAURANT FRANCHISEES

42.1 Market Leaders

According to *Chain Store Guide*, the following were the Top 5 restaurant franchisees in 2012:

	No. Units	Main Concept
• NPC International Inc.:	1,187	Pizza Hut
• Pilot Flying J:	585	Multiple
• Harman Management Corp.:	529	Yum!
• Rottinghaus Company Inc.:	363	Subway
• ADF Companies:	357	Panera

42.2 Top 100 Restaurant Franchise Companies

The following are the 100 largest restaurant franchise companies (source: Technomic):

- ACG Texas LP
- ADF Companies
- AmRest LLC
- Apex Restaurant Management Inc.
- Apple American Group
- Apple Gold Group
- Apple Sauce Inc.
- Apple-Metro Inc.
- AppleCreek Management Co. Inc.
- Austaco Inc.
- B & B Consultants
- Boddie-Noell Enterprises
- Border Foods Companies
- Both Inc.
- BR Associates Inc.
- Bridgeman Foods/ERJ Dining LLC
- BurgerBusters Inc.
- By The Rockies LLC/ Rising Stars LLC
- Carlisle Corporation
- Carolina Restaurant Group
- Carrols Restaurant Group Inc.

- Caspers Company
- Casual Restaurant Concepts
- Cedar Enterprises Inc.
- CFRA Inc.
- CLP Corporation
- Concord Hospitality Inc.
- Covelli Enterprises
- Daland Corporation
- DavCo Restaurants Inc.
- Desert De Oro Foods Inc.
- DL Rogers Corp.
- Doherty Enterprises Inc.
- Emerald Foods Inc.
- Falcon Holdings LLC
- Fourteen Foods
- Friendly Franchisees Corp.
- Frisch's Restaurants Inc.
- Fugate Enterprises
- Hamra Management Company
- Harman Management Corp.
- Heartland Food Corp
- Hospitality Restaurant Group Inc.
- Interfoods of America Inc.
- Jan Companies
- JIB Management Inc.
- JRN Inc.
- Kaizen Group of Companies
- Kazi Management VI LLC
- Kessler Group Inc.
- K-MAC Enterprises
- Luihn Food Systems Inc.
- McEssy Investment Co.
- Metro Corral Partners Inc.
- Missoula Mac Inc.
- Morgan's Foods Inc.
- MRCO LLC
- Muy Brands LLC
- Neighborhood Restaurant Group
- NPC International Inc.
- Pacific Bells Inc.
- Pacific Island Restaurants Inc.
- Palo Alto Inc.
- Paradigm Investment Group
- Pennant Foods Corp.

- Pepper Dining Inc.
- Pilot Flying J
- Pizza Properties Inc./QSR Burgers LLC
- PJ United Inc.
- QK Inc.
- Quality Dining Inc.
- Quality Restaurant Concepts LLC
- REE Inc.
- Restaurant Management Co.
- RPM Pizza
- Scarbrough Management
- Sizzling Platter Inc.
- Southern Bells Inc.
- Southern California Pizza Company
- Southern Multifoods Inc.
- SSCP Management Inc.
- Strang Corporation
- Strategic Restaurants Acquisition Corp.
- Sun Holdings LLC
- Sunshine Restaurant Partners LLC
- T-Bird Restaurant Group
- T.L. Cannon Companies
- Tacala LLC
- Tar Heel Capital
- The Bistro Group
- The Briad Group
- The Rose Group
- Thomas and King Inc.
- Treadwell Enterprises
- United States Beef Corp.
- V & J Holding Companies Inc.
- Valenti Management
- Wendy's of Colorado Springs
- Western Reserve Restaurant Management
- Wisconsin Hospitality Group

42.3 Market Resources

Top 400 Restaurant Franchise Company Report, Technomic, Inc., 300 South Riverside Plaza, Suite 1940 South, Chicago, IL 60606. (312) 876-0004. (www.technomic.com)

43

TOP GROWTH CHAINS

43.1 Systemwide Sales Growth

According to Nation's Restaurant News (www.nrn.com), the following chains reported the highest systemwide sales growth at the end of their last fiscal year (2011/2012):

Beverage-Snack Chains

- Krispy Kreme Doughnuts: 10.0%
- Dunkin' Donuts: 9.4%
- Caribou Coffee: 7.0%
- Starbucks Coffee: 6.7%
- Auntie Anne's Hand-Rolled Soft Pretzels: 6.7%
- Peet's Coffee & Tea: 5.7%
- Jamba Juice: 4.5%
- Baskin-Robbins: 0.6%
- Cold Stone Creamery: -5.2%

Buffet Chains

- Sweet Tomatoes: 4.3%
- HomeTown Buffet: -10.1%
- Old Country Buffet: -14.3%
- Ryan's Grill, Buffet & Bakery: -16.1%

Casual-Dining Chains

- Yard House: 23.6%
- BJ's Restaurant & Brewhouse: 20.8%
- Cheddar's Casual Cafe: 20.5%
- Buffalo Wild Wings Grill & Bar: 19.8%
- The Capital Grille: 14.4%
- LongHorn Steakhouse: 13.8%
- Saltgrass Steak House: 13.6%
- Bahama Breeze: 12.3%
- Brio Tuscan Grille: 11.6%
- Bonefish Grill: 9.6%
- Joe's Crab Shack: 9.6%
- Texas Roadhouse: 9.1%
- Benihana of Tokyo: 8.7%

- Red Robin Gourmet Burger: 7.8%
- Bubba Gump Shrimp Co.: 7.7%
- Red Lobster: 7.3%
- Fleming's Prime Steakhouse & Wine Bar: 7.2%
- The Cheesecake Factory: 6.7%
- Ruth's Chris Steakhouse: 6.3%
- Logan's Roadhouse: 6.1%
- J. Alexander's: 5.5%
- The Melting Pot: 5.1%
- Buca di Beppo: 4.4%
- Carrabba's Italian Grill: 4.4%
- Famous Dave's: 4.4%
- Carino's Italian: 4.1%
- Legal Sea Foods: 4.0%
- Maggiano's Little Italy: 3.5%
- Olive Garden Italian Restaurant: 3.3%
- Outback Steakhouse: 3.2%
- Bravo! Cucina Italiana: 3.1%
- Hard Rock Cafe: 2.9%
- Maggiano's Little Italy: 2.6%
- Morton's The Steakhouse: 2.6%
- Applebee's: 2.6%
- Bertucci's Italian Restaurant: 2.1%
- Chammps American: 1.9%
- Dave & Buster's: 1.9%
- Chili's Grill & Bar: 1.5%
- T.G.I.Friday's: 1.2%
- Rainforest Cafe: 0.9%
- Smokey Bones Bar & Fire Grill: 0.7%
- On the Border: 0.3%
- California Pizza Kitchen: 0.3%
- Ninety Nine Restaurant & Pub: -0.4%
- Romano's Macaroni Grill: -0.5%
- Elephant Bar Restaurant: -0.6%
- Old Chicago: -0.9%
- P.F. Chang's Chicago Bistro: -0.9%
- Hooters: -0.9%
- Houston's: -1.1%
- McCormick & Schmick's: -1.7%
- Beef 'O' Brady's Family Sports Pub: -1.7%
- Houlihan's: -3.2%
- O'Charley's: -3.7%
- Uno Chicago Grill/Pizzeria Uno: -4.7%
- Chevys Fresh Mex: -5.1%

- Ruby Tuesday: -5.4%
- Mimi's Cafe: -5.7%
- El Torito: -6.8%
- Lone Star Steakhouse & Saloon: -12.2%
- Marie Callender's Restaurant & Bakery: -20.9%
- Claim Jumper: -21.6%

Chicken Chains
- Chick-fil-A: 13.2%
- Zaxby's: 5.1%
- Bojangles' Famous Chicken 'n Biscuits: 7.7%
- Popeyes Louisiana Kitchen: 6.0%
- Boston Market: 4.1%
- El Pollo Loco: 0.2%
- Church's Chicken: -0.9%
- KFC: -2.1%

Family Chains
- Denny's: 6.9%
- Steak n Shake: 3.5%
- IHOP: 1.7%
- Waffle House: 1.5%
- Cracker Barrel Old Country Store: 1.2%
- Big Boy Restaurants/Frisch's Big Boy: 0.3%
- Bob Evans Restaurant: 0.2%
- Perkins Restaurant & Bakery: -4.5%
- Friendly's Ice Cream: -6.3%

Pizza Chains
- Little Caesars Pizza: 12.4%
- Papa Murphy's: 7.6%
- Hungry Howie's Pizza: 6.9%
- Papa John's Pizza: 5.1%
- Domino's Pizza: 3.7%
- Donatos Pizza/Pizzeria: 3.1%
- Godfather's Pizza: 2.1%
- Pizza Hut: 1.9%
- Chuck E. Cheese's: -2.6%
- CiCi's Pizza: -5.2%
- Round Table: -5.5%

Quick-Service Restaurant Chains
- Five Guys Burgers and Fries: 31.8%
- Jimmy John's: 30.0%

• Chipotle Mexican Grill:	23.6%
• Jersey Mike's Subs:	16.6%
• Firehouse Subs:	11.6%
• Qdoba Mexican Grill:	10.0%
• Moe's Southwest Grill:	9.9%
• Portillo's Hot Dogs:	8.7%
• Culver's:	8.5%
• Potbelly Sandwich Works/Shop:	7.8%
• In-N-Out Burger:	7.8%
• McAlister's Deli:	7.6%
• Subway:	7.5%
• Jason's Deli:	7.3%
• Charley's Grilled Subs:	7.2%
• Whataburger:	7.0%
• McDonald's:	5.5%
• Taco Cabana:	5.5%
• Taco John's:	4.6%
• Hardee's:	4.1%
• Schlotzsky's Deli:	3.2%
• Arby's:	3.0%
• Krystal:	2.8%
• Braum's Ice Cream & Dairy Stores:	2.4%
• Wienerschnitzel:	2.3%
• Wendy's:	2.1%
• Del Taco:	2.0%
• Sonic America's Drive-In:	1.9%
• Rally's Hamburgers:	1.7%
• Carl's Jr.:	1.7%
• Checkers Drive-In:	1.6%
• White Castle:	1.5%
• Taco Bell:	1.5%
• Jack in the Box:	0.4%
• Così:	0.2%
• Taco Bueno:	0.2%
• A&W All American Food:	0.0%
• Dairy Queen:	0.0%
• Johnny Rockets:	-0.1%
• Rubio's Fresh Mexican Grill:	-0.7%
• Baja Fresh Mexican Grill:	-1.0%
• Burger King:	-3.6%
• Fuddruckers:	-8.7%
• Quiznos:	-24.7%

43.2 Market Resources

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

44

TOP INDEPENDENT RESTAURANTS

44.1 Rank By Annual Gross Revenue

According to *Forbes* (August 2012), the following independent restaurants have the highest annual gross revenue:

• Bob Chinn's Crab House (Wheeling, IL):	$24.0 million
• The Grill On Main (Edgartown, MA):	$23.5 million
• Sparks Steak House (New York, NY):	$23.0 million
• Tony's Restaurant & Catering (Houston, TX):	$20.0 million
• Athenian Inn (Seattle, WA):	$19.2 million
• Joe's Stone Crab (Miami Beach, FL):	$19.0 million
• Rickey's Restaurant (Novato, CA):	$18.7 million
• Bridgewater Grill (Golden, CO):	$18.4 million
• Elizabeth on 37th (Savannah, GA):	$17.4 million
• Jeeves & Co. (Scottsburg, IN):	$15.9 million

"The highest grossing restaurant in the U.S. is not in some swank corner of Manhattan or on a glittery Los Angeles boulevard, but in the unassuming Chicago suburb of Wheeling."

Forbes, 8/6/12

45

TOP MULTI-CHAIN OPERATORS

45.1 Largest Multi-Brand Restaurant Companies

Ranked by annual U.S. systemwide sales, the following are the largest restaurant companies operating multiple chain brands:

- Yum! Brands Inc. (www.yum.com): $17.10 billion
  Brands: KFC, Pizza Hut, Taco Bell

- Darden Restaurants Inc. (www.darden.com): $ 7.80 billion
  Brands: Bahama Breeze, LongHorn Steakhouse, Olive Garden, Red Lobster, Seasons 52, The Capital Grille

- DineEquity (www.dineequity.com): $ 7.05 billion
  Brands: Applebee's Neighborhood Grill & Bar, IHOP

- Roark Capital Group (www.roarkcapital.com): $ 4.97 billion
  Brands: Arby's, Auntie Annie's, Carvel Ice Cream, Cinnabon, Corner Bakery Cafe, Il Fornaio, McAlister's Deli, Moe's Southwest Grill, Schlotzsky's Deli, Seattle's Best Coffee, Wingstop

- Bloomin' Brands (www.blomminbrands.com): $ 4.00 billion
  Brands: Outback Steakhouse, Carrabba's Italian Grill, Roy's, Fleming's Prime Steakhouse, Bonefish Grill

- Brinker International Inc. (www.brinker.com): $ 3.95 billion
  Brands: Chili's Grill & Bar, Maggiano's Little Italy

- Apollo Global Management (www.agm.com): $ 3.31 billion
  Brands: Carl's Jr., Hardee's

- Sun Capital Partners Inc. (www.suncappart.com): $ 2.12 billion
  Brands: Bar Louie, Boston Market, Captain D's, Fazoli's, Friendly's, Garden Fresh, LaPlace, Restaurants Unlimited, Smokey Bones

- Fertitta Entertainment Inc. (www.fertittaentertainment.com): $ 1.24 billion
  Brands: Bubba Gump Shrimp Co., Charley's Crab,
  Chart House, Claim Jumper, Landry's Seafood, Morton's,
  Rainforest Cafe, Saltgrass Steak House, The Crab House,
  The Oceanaire Seafood Room

46

TOP MULTI-CONCEPT OPERATORS

46.1 Largest Companies

Fine- and casual-dining restaurants are primarily operated by independents and chains, yet an increasing number are being operated by multi-concept operators. This chapter assesses the largest of these groups.

Restaurants operated by hotel chains are not classified as multi-concept restaurants. Quickservice and fast-casual concepts are also not included in the assessment of multi-concept restaurant operations.

46.2 Largest Multi-Concept Operators

Ranked by annual sales, the following are the largest multi-concept operators (source: *2013 Directory of Chain Restaurant Operators*, published by Chain Store Guide [www.chainstoreguide.com]):

- Landry's Restaurants Inc.: $1.42 billion
- Pappas Restaurants: $ 525 million
- Lettuce Entertain You Enterprises: $ 400 million
- Hillstone Restaurant Group Inc.: $ 369 million
- Kimpton Hotel & Restaurant Group: $ 353 million
- Consolidated Restaurant Operations Inc.: $ 188 million
- Wolfgang Puck Fine Dining Group: $ 168 million
- Starr Restaurant Organization: $ 167 million
- Ark Restaurant Corporation: $ 139 million
- Restaurants Unlimited: $ 135 million
- Tavistock Restaurants: $ 133 million
- Patina Restaurant Group: $ 126 million
- Clyde's Restaurant Group: $ 110 million
- Specialty Restaurant Corporation: $ 108 million
- McMenamins Pubs & Breweries: $ 107 million
- The Olive Group: $ 100 million

46.3 Profiles

The following are profiles of multi-concept operators with annual revenue of $35 million or more:

Ala Carte Entertainment (Schaumburg, IL; www.aceplaces.com)
- Area of operation: IL
- Annual sales: $48.0 million
- Brands: Ace Caterings, Ace Home, Ace Websites, Cadillac Ranch, Chandler's Chophouse, Club 220 North, Dick's River Road House, Drink, Excalibur, Famous Freddie's Roadhouse, Fin McCools, Metro Deli, Moretti's, One Last Fling Chicago, Rocking The Chain, Snuggery, The Apartment, The Leg Room, The Lion Head Pub, Vision

Ark Restaurant Corporation (New York, NY; www.arkrestaurants.com)
- Areas of operation: CT, DC, FL, MA, NJ, NV, NY
- Annual sales: $138.9 million
- Brands: America, Broadway Burger Bar & Grill, Bryant Park Grille, Canyon Road, Center Cafe, Clyde Frazier's Wine and Dine, Durgin Park Restaurant, El Rio Grande, Gallagher's Burger Bar, Gallagher's Steakhouse, Gonzalez y Gonzalez, Hard Rock Hotel & Casino Hollywood Food Court, Hard Rock Hotel & Casino Tampa Food Court, Lucky Seven, MGM Grand Food Court, Robert, Sequoia, The Grill At Two Trees, The Sporting House, Thunder Grill, Venetian Casino Resort Food Court, Village Streets, Yolos Mexican Grill

B.R. Guest Inc. (New York, NY; www.brguestrestaurants.com)
- Areas of operation: IL, NV, NY
- Annual sales: $ 56.0 million
- Brands: 675 Bar, Atlantic Grill, Bill's Bar and Burger, Blue Fin, Blue Water Grill New York, Dos Caminos, Fiamma, Isabella's, Ocean Grill, Ruby Foo's Time Square, Sammy D's, Strip House, Wildwood Barbeque

Buckhead Life Restaurant Group (Atlanta, GA; www.buckheadrestaurants.com)
- Areas of operation: FL, GA
- Annual sales: $73.0 million
- Brands: 103 West, Atlanta Fish Market, Bistro Niko, Buckhead Diner, Chops Lobster Bar, Corner Cafe/Buckhead Bread, Kyma, Nava, Pricci, Veni Vidi Vici

Cameron Mitchell Restaurants (Columbus, OH; www.cameronmitchell.com)
- Areas of operation: FL, KY, OH, MI
- Annual sales: $86.0 million
- Brands: Cameron's American Bistro, Cap City Fine Diner, M, Marcella's Ristorante, Pizzeria and Wine Bar, Martini Modern Italian, Miranova Cafe, Mitchell's Ocean Club, Molly Woo's, Ocean Prime

Centra Archy Restaurant Management Co. (Charleston, SC; www.centraarchy.com)
- Areas of operation: FL, GA, LA, NC, SC
- Annual sales: $65.0 million

- Brands: California Dreaming, Carolina Roadhouse, Chophouse 47, Chophouse New Orleans, Fiesta Del Burro Loco, Gulfstream Cafe, Joey D's Oak Room, Lenox Square Grill, New York Prime, The Tavern at Phipps

Charlie Palmer Group (New York, NY; www.charliepalmer.com)
- Areas of operation: CA, DC, NV, NY, TX
- Annual sales: $55.0 million
- Brands: Astra, Aureole, Briscola, Burritt Room + Tavern, Charlie Palmer @ Bloomingdales, Charlie Palmer On The Joule, Charlie Palmer Steak, District Meats, Dry Creek Kitchen

Clyde's Restaurant Group (Washington, DC; www.clydes.com)
- Areas of operation: DC, MD, VA
- Annual sales: $110.0 million
- Brands: 1789 Restaurant, Clyde's, Clyde's Willow Creek Farm, F. Scott's, Old Ebbitt Grill, The Hamilton, The Tomato Palace, The Tombs, Tower Oaks Lodge

Concentrics Restaurants (Atlanta, GA; www.concentricshospitality.com)
- Areas of operation: FL, GA
- Annual sales: $70.0 million
- Brands: Flip, HD1, Lobby at Twelve, LPC, Luma on Park, Murphy's, ONE Midtown Kitchen, Parish, Prato, Room at Twelve, Tap, The Spence, Three Sixty, Two Urban Licks

Consolidated Restaurant Operations Inc. (Dallas, TX; www.croinc.com)
- Areas of operation: AL, AR, CO, FL, KY, LA, MO, OK, SC, TN, TX
- Annual sales: $188.0 million
- Brands: Cantina Laredo, Cool River Cafe Steakhouse & Southwestern Grill, Double D Ranch, El Chico Cafe, Good Eats Grill, III Forks, Lucky's Cafe, Silver Fox Steakhouse

Copper Cellar Corporation (Knoxville, TN; www.coppercellar.com)
- Area of operation: TN
- Annual sales: $50.0 million
- Brands: Calhoun's, Cappuccino's, Cherokee Grill, Chesapeake's, Copper Cellar, Cumberland Grill, Smoky Mountain Brewery

Divine Dining Group (Myrtle Beach, SC; www.divinediningroup.com)
- Area of operation: SC
- Annual sales: $40.0 million
- Brands: Blue Crab, Bovine's Wood Fired Specialities, Bubba's Fish Shack, Divine Fish House, Divine Prime Restaurant, River City Cafe, Ultimate California Pizza, Wahoo's Raw Bar & Marina

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

Gibson Restaurant Group (Chicago, IL; www.gibsonssteakhouse.com)
- Area of operation: IL
- Annual sales: $51.0 million
- Brands: Gibsons Bar & Steakhouse, Hugo's Frog Bar & Fish House, Luxbar, Quartino Ristorante, Pizzeria Wine Bar

Great American Restaurants
(Falls Church, VA; www.greatamericanrestaurants.com)
- Area of operation: VA
- Annual sales: $56.5 million
- Brands: Artie's, Best Buns Bread, Carlyle, Coastal Flats, Jackson's, Mike's American Grill, Ozzie, Silverado, Sweetwater Tavern

Hal Smith Restaurant Group (Norman, OK; www.eshrg.com)
- Areas of operation: AR, AZ, FL, IN, KS, MD, NE, OK, TX, VA
- Annual sales: $96.0 million
- Brands: Big Tuna, Charleston's Restaurant, Hefner Grill, Krispy Kreme Doughnuts, Louie's Grill and Bar, Mahogany Prime Steak House, Mama Roya, Red Rock Canyon Grille, Sauce, Ted's Café Escondido, The Garage, Toby Keith's I Love This Bar & Grill, Upper Crust Wood Fired Pizza

Hillstone Restaurant Group Inc. (Beverly Hills, CA; www.hillstone.com)
- Areas of operation: AZ, CA, CO, FL, GA, IL, LA, MA, MD, MO, NJ, NY, TN, TX
- Annual sales: $369.0 million
- Brands: Bandera, Cherry Creek Grill, East Hampton Grill, Gulfstream, Hillstone, Houston's, Los Altos Grill, Palm Beach Grill, R + D Kitchen, Rutherford Grill, South Beverly Grill, Woodmont Grill

Kimpton Hotel & Restaurant Group (San Francisco, CA; www.kimptonhotels.com)
- Areas of operation: AZ, CA, CO, DC, FL, IL, MA, NY, OR, TX, UT, WA
- Annual sales: $353.0 million
- Brands: 312 Chicago, 39 Degrees, Alto Rex, Area 31, Atwood Café, B&O Brasserie, Bambara Cambridge, Bambara Salt Lake City, Bar Rouge, Blue Mermaid Café, BLVD 16, Bookstore Bar & Café, BRABO, Café Pescatore, Central 214, Cobalt, Domaso Trattoria Moderna, Encore, Fifth Floor, Firefly, Grand Café, Harry Denton's Starlight Room, Heaton's Reef Bar & Grill, Helix Lounge, Jackson 20, KO Prime, Library Bistro, NIOS, Pacci Ristorante, Panzano, Park Place, Pazzo Bakery & Café, Pazzo Ristorante, Ponzu, Poste Brasserie, Postrio, Puccini & Pinetti, Red Star

Tavern & Roast House, Ruby Room, Sable Kitchen & Bar, Sazerac, Scala's Bistro, Silverleaf Tavern, Six and Lounge Six, Social, South Water Kitchen, Square 1682, Taggia, The Grille, Tulio, Urbana

King's Seafood Co. (Costa Mesa, CA; www.kingsseafood.com)
- Areas of operation: AZ, CA, NV
- Annual sales: $50.5 million
- Brands: 555 East Prime, Fish Camp, King's Fish House and King Crab Lounge, Lou & Mickeys, Ocean Avenue Seafood, Pier Burger, Water Grill

Landry's Restaurants Inc. (Houston, TX; www.landrysseafood.com)
- Areas of operation: AL, AZ, CA, CO, CT, FL, GA, IL, KS, KY, LA, MA, MD, MI, MN, MO, NJ, NM, NY, OK, OR, PA, SC, TN, TX, VA, WA
- Annual sales: $1.42 billion
- Brands: Aquarium, Babin's Seafood House, Beso Steakhouse, Big Fish Seafood Bistro, Brenner's Steakhouse, Bubba Gump Shrimp Co., Cadillac Bar Restaurant, Charley's Crab, Chart House, Claim Jumper, Fish Tales, Fisherman's Wharf, Gandy Dancer, Grand Concourse, Grotto, Harlow's, Jake's Famous Crawfish, Jake's Grill, La Griglia, Landry's Seafood House, M & S Grill, Mai Tai Bar, McCormick & Schmick's Grille, McCormick's Fish House & Bar, Meriwether's, Peohe's, Rainforest Café, Red Sushi, River Crab, Rusty Pelican, Saltgrass Steak House, Simms Steakhouse, Spenger's Fresh Fish Grotto, T-Rex Café, The Boathouse, The Crab House, The Flying Dutchman, The Heathman Restaurant & Bar, The Oceanaire Seafood Room, Tower of the Americas, Vic & Anthony's Steakhouse, William Douglas Steakhouse, Willie G's Seafood & Steak House, Yak & Yeti

Lettuce Entertain You Enterprises (Chicago, IL; www.leye.com)
- Areas of operation: AZ, CA, IL, MN, NV, VA
- Annual sales: $400.0 million
- Brands: Antico Posto, Big Bowl Fresh Chinese and Thai, Bub City, Cafe Ba-Ba-Reeba!, Community Canteen, Di Pescara, Don & Charlie's, Eiffel Tower Restaurant, El Segundo Sol Taqueria & Margarita Bar, Everest, foodlife, Frankie's Scaloppine & Fifth Floor Pizzeria, Hub 51, Joe's Seafood, Prime Steak, and Stone Crab, L. Woods Tap & Pine Lodge, L20, M Burger, M Street Kitchen, Maggiano's Little Italy, Mity Nice Grill, Mon Ami Gabi, Nacional 27, Osteria via Stato, Paris Club, Petterino's, Pizzeria via Stato, R.J. Grunts, Reel Club, RPM Pizza, Saranello's, Scoozi!, Shaw's Crab House, Stella Rossa Pizza Bar, Stripburger, The Magic Pan Crepe Stand, Tokio Pub, Tru, Tucci Benucch, Twin City Grill, Wildfire, Wow Bao

M Crowd Restaurant Group (Irving, TX; www.mcrowd.com)
- Areas of operation: GA, MO, TX
- Annual sales: $50.0 million
- Brands: Mi Cocina, Taco Diner, The Mercury Grill

Mad Anthony's Inc (Kirkland, WA; www.anthonys.com)

- Areas of operation: OR, WA
- Annual sales: $51.0 million
- Brands: Anthony's at Cap Sante Boat Haven, Anthony's at Columbia Point, Anthony's at Gig Harbor, Anthony's at Point Defiance, Anthony's at Sinclair Inlet, Anthony's at Spokane Falls, Anthony's at Squalicum Harbor, Anthony's at The Old Mill District, Anthony's Beach Café, Anthony's Bell Street Diner, Anthony's Fish Bar, Anthony's Hearthfire Grill, Anthony's HomePort, Anthony's Pier 66, Anthony's Seafood Grill, Anthony's Woodfire Grill, Chinook's at Salmon Bay, Des Moines Oyster Bar & Grill, Harbor Lights, Little Chinook's

McMenamins Pubs & Breweries (Portland, OR; www.mcmenamins.com)

- Areas of operation: OR, WA
- Annual sales: $106.7 million
- Brands: Back Stage Bar, Bagdad Café and Theater, Barley Mill Pub, Black Rabbit Restaurant, Blue Moon Tavern and Grill, Cornelius Pass Road House and Brewery, Dad Watsons Restaurant and Brewery, East 19th Street Café, Edgefield Manor, Fulton Pub and Brewery, Grand Lodge, Greater Trumps, Greenway Pub, High Street Brewery & Pub, Highland Pub and Brewery, Hillsdale Brewery and Public House, Hotel Oregon, Hotel Oregon Pub, John Barleycorn's Restaurant and Brewery, Kennedy School, Lighthouse Brewpub, Market Street Pub, McMenamins, Mission Theater and Pub, North Bank, Oak Hills Brewpub, Olympic Club, Raleigh Hills Pub, Ringler's Annex, Ringlers, Riverwood Pub, Rock Creek Tavern, Six Arms Brewpub, The Crystal Ballroom, The Ram's Head, The White Eagle, Thompson Brewery and Public House

Pappas Restaurants (Houston, TX; www.pappadeaux.com)

- Areas of operation: AZ, CO, GA, IL, NM, OH, TX
- Annual sales: $525.0 million
- Brands: Dot Coffee Shop, Pappadeaux Seafood Kitchen, Pappas B-B-Q, Pappas Bros. Steakhouse, Pappas Burger, Pappas Seafood House, Pappasito's Cantina, Ruby's Diner, Yia Yia Marys Pappas Greek Kitchen

Patina Restaurant Group (New York, NY; www.patinagroup.com)
Areas of operation: CA, FL, NV, NY

- Annual sales: $126.0 million
- Brands: Brasserie, Brasserie 8 ½, C+M at LACA, Café at the Opera, Café Centro, Café Descanso at Descanso Gardens, Café Pinot, Catal Restaurant & UVA Bar, Concert Hall Café, Cucina & CO, Kendell's Brasserie, LACMA Café, La Fonda Del Sol, Leatherby's Café Rouge, Lincoln Ristorante, Macy's Cellar Bar & Grill, Market Café, Naples 45, Naples Ristorante & Pizzeria, Nick & Stef's Steakhouse, Norton Simone Café at Norton Simon Museum, Panevino Ristorante, Patina, Pinot Brasserie at the Venetian, Pinot Grill, Pinot Provence, Ray's and Stark Bar at LACMA, Rock Center Café, Rooftop Grill at Hollywood Bowl, Spotlight Café,

Tangata, Taqueria, The Beer Bar, The Grand Tier Restaurant, The Rink, The Sea Grill, Tortilla Jo's, Tutto Italia, Via Napoli

Restaurants-America (Glenview, IL; www.restaurants-america.com)
- Areas of operation: FL, IL, MD, MN, TX, VA
- Annual sales: $40.0 million
- Brands: Bluepointe Oyster Bar, Boca Chica Tapas & Tequila, Central Standard, Midtown Kitchen & Bar, Mockingbird Taproom, One North, Park Tavern, Primebar, Red Star Tavern, The Grilroom, Townhouse Restaurant & Wine Bar

Restaurants Unlimited (Seattle, WA; www.r-u-i.com)
- Areas of operation: AK, AZ, CA, HI, IN, MN, OH, OR, TX, VA, WA
- Annual sales: $135.0 million
- Brands: Billy Heartbeats, Clinkerdagger, Cutters Crabhouse, Henry's Tavern, Horatio's, Kincaid's, Maggie Bluff's, Manzana, Newport Bay, Palisade, Palomino Restaurant & Bar, Pizzeria Fondi, Portland City Grill, Portland Seafood Co., Ryan's Grill, Scott's Bar & Grill, Simon & Seafort's Saloon & Grill, Skates on the Bay, Stanford's, Stanley & Seafort's Steak, Chop & Fish House

Restaurants-America (Glenview, IL; www.restaurants-america.com)
- Areas of operation: FL, IL, MD, MN, TX, VA
- Annual sales: $40.0 million
- Brands: Bluepointe Oyster Bar, Boca Chica Tapas & Tequila, Central Standard, Midtown Kitchen & Bar, Mockingbird Taproom, One North, Park Tavern, Primebar, Red Star Tavern, The Grillroom, Townhouse Restaurant & Wine Bar

Schwartz Brothers Restaurants (Bellevue, WA; www.schwartzbros.com)
- Area of operation: WA
- Annual sales: $53.0 million
- Brands: Chandler's Crabhouse, Daniel's Broiler, Spazzo Italian Grill

Select Restaurants (Cleveland, OH; www.selectrestaurants.com)
- Areas of operation: CA, IL, MA, MD, OH, PA
- Annual sales: $50.0 million
- Parker Restaurant & Bar, Parker's Lighthouse, Parkers Blue Ash Tavern, Pier W, Rusty Scupper, Top of the Hub, Winberie's Restaurant & Bar

Specialty Restaurants Corporation (Anaheim, CA; www.specialtyrestaurants.com)
- Areas of operation: CA, CO, FL, NY, OH, TX
- Annual sales: $107.5 million
- Brands: 100th Bomb Group, 56th Fighter Group, 94th Aero Squadron, Brady's Landing, Castaway, Guaymas, HS Lordships, Luminarias, Monterey Hill Steak & Seafood Restaurant, Orange Hill, Rusty Pelican, Shanghai Reds, Sunbird, The Odyssey, The Proud Bird, The Reef, The River Club Restaurant, Whiskey Joe's

Starr Restaurant Organization (Philadelphia, PA; www.starr-organization.com)
- Areas of operation: FL, NJ, NY, PA
- Annual sales: $166.6 million
- Brands: Alma de Cuba, Barclay Prime, Buddakan, Butcher and Singer, Caffe Storico, Continental Midtown, El Rey, El Vez, Fette Sau, Frankford Hall, Granite Hill at Philadelphia Museum of Art, Il Pittore, Jones, Le Diplomate, Makoto, Morimoto, Parc, Pizzeria Stella, Pod, Rat's Restaurant, Route 6, Square Burger, Steak 954, Talula's Garden, The Continental, The Dandelion Pub

TS Restaurants (Lahaina, HI; www.tsrestaurants.com)
- Areas of operation: CA, HI
- Annual sales: $96.0 million
- Brands: Duke's, Hula Grill, Jake's Del Mar, Keoki's Paradise, Kimo's, Leilani's on the Beach, Sandys Beach Grill, Sunnyside Restaurant & Lodge

Tavistock Restaurants (Emeryville, CA; www.tavistock.com)
- Areas of operation: AR, AZ, CA, CT, FL, IN, KS, MA, MD, MN, MO, NH, NJ, OK, PA, RI, TX
- Annual sales: $132.6 million
- Brands: Abe & Louie's, Alcatraz Brewing Co., Atlantic Fish, Blackhawk Grille, Cafe Del Rey, California Cafe Bar & Grill, Charley's, Coach Grill, FREEBIRDS World Burrito, Joe's American Bar & Grill, Napa Valley Grille, Sapporo, Zed 451

The Glazier Group (www.theglaziergroup.com)
- Areas of operation: FL, NJ, NY
- Annual sales: $42.8 million
- Brands: Bridgewaters, Michael Jordan's The Steak House, Strip House

The Olive Group (Charlestown, MA; www.toddenglish.com)
- Areas of operation: CT, FL, MA, NV, NY
- Annual sales: $100.0 million
- Brands: BlueZoo, BonFire, Ca Va Brasserie, English Tap and Beer Gardens, Figs, Isabell's CurlyCakes, Kingfish Hall, Olives, Plaza Food Hall, Todd English P.U.B., Todd English Restaurant, Todd English Tuscany

Tour de France (New York; New York; www.tourdefrancenyc.com)
- Area of operation: NY
- Annual sales: $48.0 million
- Brands: Café D'Alsace, French Roast, L'Express, Le Monde, Maison, Marseille, Nice Matin, Pigalle

Trowbridge Restaurant Group (Bingham Farms, MI; www.mattpreincerg.com)
Area of operation: MI

- Annual sales: $41.6 million
- Brands: Coach Insignia, Deli Unique, Gastronomy, No. VI Chophouse & Lobster Bar, Northern Lakes Seafood Co., Plaza Deli

Wolfgang Puck Fine Dining Group (Beverly Hills, CA; www.wolfgangpuck.com)

- Areas of operation: AZ, CA, CO, DC, FL, GA, HI, IL, IN, KY, MA, MI, NC, NV, NJ, NY, OH, OK, RI, TX, UT, WA
- Annual sales: $167.7 million
- Brands: Chinois, CUT, Five Sixty by Wolfgang Puck, Gelson's Grab and Go, Jai by Wolfgang Puck, Measure, Postrio Bar & Grill, Puck's at the MCA, Red/Seven, Spago, Spectra by Wolfgang Puck, Trattoria del Lupo, The Source, Wolfgang Puck American Grille, Wolfgang Puck Bar & Grill, Wolfgang Puck Bistro, Wolfgang Puck Bistro, Wolfgang Puck Express, Wolfgang Puck Grand Café, Wolfgang Puck Grille, Wolfgang Puck Kiosk, Wolfgang Puck Pizza / Bar, Wolfgang Puck Pizzeria & Cucina, Wolfgang Puck Steak, WP24 by Wolfgang Puck

47

TOP NIGHTCLUBS & BARS

47.1 Top Clubs

Nightclub and Bar Magazine annually ranks the top clubs in the United States by estimated revenue. The 2012 list is as follows:

• Marquee Nightclub & Dayclub (Las Vegas, NV; www.marqueelasvegas.com):	$70-$80 million
• XS Nightclub (Las Vegas, NV; www.xslasvegas.com):	$60-$70 million
• TAO Nightclub (Las Vegas, NV; www.taolasvegas.com):	$60-$70 million
• Pure Nightclub (Las Vegas, NV; www.purethenightclub.com):	$45-$60 million
• LIV (Miami Beach, FL; www.livnightclub.com):	$35-$45 million
• LAX Nightclub (Las Vegas, NV; www.laxthenightclub.com):	$35-$45 million
• HAZE Nightclub (Las Vegas, NV; www.lightgroup.com):	$35-$45 million
• Surrender Nightclub (Las Vegas, NV; www.surrendernightclub.com):	$35-$45 million
• The Bank Nightclub (Las Vegas, NV; www.lightgroup.com):	$25-$35 million
• LAVO Nightclub NYC (New York, NY; www.lavony.com):	$25-$35 million
• The Pool After Dark (Atlantic City, NJ; www.caesars.com):/poolafterdark/):	$25-$35 million
• LAVO LV (Las Vegas, NV; www.lavolv.com):	$25-$35 million
• Tryst Nightclub www.trystlasvegas.com):	$25-$35 million
• Mango’s Tropical Cafe (Miami Beach, FL; www.mangostropicalcafe.com):	$25-$35 million
• Seacrets (Ocean City, MD; www.seacrets.com):	$15-$25 million
• Avalon Hollywood (Los Angeles, CA; www.avalonhollywood.com):	$15-$25 million
• Pacha New York (New York, NY; www.pachanyc.com):	$15-$25 million
• Sevilla Nightclub (Long Beach, CA; www.sevillanightclub.com):	$15-$25 million
• Vanity Nightclub (Las Vegas, NV; www.vanitylv.com):	$15-$25 million
• ghOstbar (Las Vegas, NV; www.n9negroup.com):	$15-$25 million
• Drai’s Afterhours (Las Vegas, NV; www.draisafterhours.com):	$15-$25 million
• Clevelander (Miami Beach, FL; www.clevelander.com):	$15-$25 million
• MOON Nightclub (Las Vegas, NV; www.n9negroup.com):	$10-$15 million
• FLUXX (San Diego, CA; www.fluxxsd.com):	$10-$15 million
• Billy Bob’s Texas (Fort Worth, TX; www.billybobstexas.com):	$10-$15 million
• Mansion (Miami Beach, FL; www.mansionmiami.com):	$10-$15 million
• Masquerade (New Orleans, LA; www.masqueradenights.com):	$10-$15 million
• 207 (San Diego, CA; www.207sd.com):	$10-$15 million
• ROOF (Chicago, IL; www.roofonthewit.com):	$10-$15 million

- The Gold Lounge (Las Vegas, NV; www.lightgroup.com): $10-$15 million
- Shrine Asian Kitchen Lounge & Nightclub (Mashantucket, CT; www.shrinemgmfoxwoods.com): $10-$15 million
- SET Nightclub (Miami Beach, FL; www.setmiami.com): $10-$15 million
- Stingaree (San Diego, CA; www.stingsandiego.com): $10-$15 million
- AJ's club bimini (Destin, FL; www.ajs-destin.com): $10-$15 million
- Playboy Club (Las Vegas, NV; www.n9negroup.com): $10-$15 million
- Float (San Diego, CA; www.207sd.com): $10-$15 million
- Opera Nightclub (Atlanta, GA; www.operaatlanta.com): $10-$15 million
- Drai's Hollywood (Los Angeles, CA; www.hollywood.drais.net): $10-$15 million
- Kilroy's Sports Bar (Bloomington, IN; www.kilroys-bloomington.com): $10-$15 million
- Vision (Chicago, IL; www.visionnightclub.com): $10-$15 million
- Rain Nightclub (Las Vegas, NV; www.n9negroup.com): $10-$15 million
- Ivy (San Diego, CA; www.ivyentertainmentsandiego.com): $10-$15 million
- P.O.V (Washington, DC; www.pointofviewdc.com): $10-$15 million
- 1 Oak NYC (New York, NY; www.1oaknyc.com): $10-$15 million
- The Chandelier (Las Vegas, NV; www.cosmopolitanlasvegas.com): $10-$15 million
- Plush (Dallas, TX; www.plushdallas.com): $10-$15 million
- Public House (Chicago, IL; www.publichousechicago.com): $10-$15 million
- Playhouse Nightclub (Los Angeles, CA; www.playhousenightclub.com): $10-$15 million
- Bar Anticipation (Lake Como, NJ; www.bar-a.com): $10-$15 million
- Webster Hall (New York, NY; www.websterhall.com): $10-$15 million
- Avenue (New York, NY; www.avenue-newyork.com): $10-$15 million
- The Park Lounge (Sacramento, CA; www.theparkdowntown.com): $10-$15 million
- Wall (Miami Beach, FL; www.wallmiami.com): $10-$15 million
- Sutra OC (Costa Mesa, CA; www.sutraoc.com): $10-$15 million
- Altitude Sky Lounge (San Diego, CA; www.altitudeskylounge.com): $10-$15 million
- 1015 Folsom (San Francisco, CA; www.puraclub.com): $10-$15 million
- Marquee NY (New York, NY; www.marqueeny.com): $5-$10 million
- Studio 54 (Las Vegas, NV; www.mgmgrand.com/nightlife): $5-$10 million
- Krave Nightclub (Las Vegas, NV; www.kravelasvegas.com): $5-$10 million
- The Highlands Hollywood (Los Angeles, CA; www.thehighlandshollywood.com): $5-$10 million
- tenjune (New York, NY; www.tenjunenyc.com): $5-$10 million
- LOVE (Washington, DC; www.lovetheclub.com): $5-$10 million
- Ecco Ultra Lounge (Los Angeles, CA; www.eccohollywood.com): $5-$10 million
- Space Miami (Miami, FL; www.clubspace.com): $5-$10 million
- Passion Nightclub (Hollywood, FL; www.passionnightclub.com): $5-$10 million
- Stoney's Rockin' Country (Las Vegas, NV; www.stoneysrockincountry.com): $5-$10 million

- Cameo (Miami Beach, FL; www.cameomiami.com): $5-$10 million
- Element (New York, NY; www.elementny.com): $5-$10 million
- Club 152 (Memphis, TN; www.club152memphis.com): $5-$10 million
- Tengo Sed Cantina (Kansas City, MO; www.tengosedcantina.com): $5-$10 million
- Excalibur (Chicago, IL; www.excaliburchicago.com): $5-$10 million
- Vanguard (Los Angeles, CA; www.vanguardla.com): $5-$10 million
- Dusk (Atlantic City, NJ; www.duskac.com): $5-$10 million
- G Lounge (New York, NY; www.glounge.com): $5-$10 million
- Glass Cactus Nightclub (Grapevine, TX; www.glasscactusnightclub.com): $5-$10 million
- Axis Radius (Scottsdale, AZ; www.axis-radius.com): $5-$10 million
- Gryphon (Hollywood, FL; www.gryphon-club.com): $5-$10 million
- Havana Club (Atlanta, GA; www.havanaclubatl.com): $5-$10 million
- Heat Ultra Lounge (Anaheim, CA; www.heatultraloungeoc.com): $5-$10 million
- Lagasse's Stadium (Las Vegas, NV; www.palazzo.com): $5-$10 million
- Baja Sharkeez (Hermosa Beach, CA; www.sharkeez.net): $5-$10 million
- Sandbar Mexican Restaurant & Tequila Bar (Santa Barbara, CA; www.sandbarsb.com): $5-$10 million
- Shade Lounge (Scottsdale, AZ; www.wscottsdalehotel.com): $5-$10 million
- The Park at Fourteenth (Washington, DC; www.theparkatfourteenth.com): $5-$10 million
- Panama Joe's (Long Beach, CA; www.sharkeez.net): $5-$10 million
- Seville Quarter (Pensacola, FL; www.sevillequarter.com): $5-$10 million
- Temple Nightclub (San Francisco, CA; www.templesf.com): $5-$10 million
- MIXX (Atlantic City, NJ; www.borgatanightlife.com): $5-$10 million
- Drink Houston (Houston, TX; www.drinkhouston.com): $5-$10 million
- The Happy Ending Bar and Restaurant (Los Angeles, CA; www.thehappyendingbar.com): $5-$10 million
- Dream Nightclub (Miami Beach, FL; www.dreammia.com): $5-$10 million
- Grizzly Rose (Denver, CO; www.grizzlyrose.com): $5-$10 million
- Celebrations Nitelife (Myrtle Beach, SC; www.celebrationsnitelife.com): $5-$10 million
- Bull & Bear (Chicago, IL; www.bullbearbar.com): $5-$10 million
- Sloppy Joe's (Key West, FL; www.sloppyjoes.com): $5-$10 million
- Whiskey Girl (San Diego, CA; www.whiskeygirl.com): $5-$10 million
- Ten Nightclub (Newport Beach, CA; www.tenoc.com): $5-$10 million
- Bohemian Hall & Beer Garden (Astoria, NY; www.bohemianhall.com): $5-$10 million
- Cotton Eyed Joe (Knoxville, TN; www.cottoneyedjoe.com): $5-$10 million

PART VI: THE CUSTOMER

48

CUSTOMER DEMOGRAPHICS

48.1 Overview

Who's Buying at Restaurants and Carry-outs, published by New Strategist (www.newstrategist.com), and based on data from the *Consumer Spending Survey*, by the Bureau of Labor Statistics (www.bls.gov), provides a demographic assessment of full-service and quick-service restaurant patronage across the breakfast, lunch, and dinner day-parts. Assessment is also made for dining while traveling and spending for snacks at quick-service restaurants.

Average annual household spending for the eight restaurant occasions and formats are as follows:

• Breakfast, full-service restaurants:	$ 99.99
• Breakfast, quick-service restaurants*:	$115.45
• Lunch, full-service restaurants:	$294.75
• Lunch, quick-service restaurants*:	$388.05
• Dinner, full-service restaurants:	$720.06
• Dinner, quick-service restaurants*:	$342.18
• Dining while traveling:	$237.87
• Snacks at quick-service restaurants*:	$111.01

* Quick-service restaurants in this analysis include takeout, delivery, concessions, buffets, and cafeterias other than those operated by employers and schools.

Sections 48.2 through 48.9, which follow, provide demographic assessments of these eight restaurant occasions and formats. Based on this data, assessments for spending by age, household income, household type, race/ethnicity, region, and education are presented in sections 48.10 through 48.15, respectively.

48.2 Breakfast at Full-Service Restaurants

The following is a demographic assessment of consumer spending for breakfast at full-service restaurants:

Age of Householder	**Index**	**Marketshare**	**$ Per HH**
• Under age 25:	58	4%	$ 58
• 25-to-34:	84	14%	$ 84
• 35-to-44:	100	19%	$ 100
• 45-to-54:	110	23%	$ 110
• 55-to-64:	124	20%	$ 124

• 65-to-74:	123	13%	$ 123
• 75 and older:	70	7%	$ 70

Household Income	**Index**	**Marketshare**	**$ per HH**
• Under $20,000:	44	9%	$ 44
• $20,000 to $39,999:	69	15%	$ 69
• $40,000 to $49,999:	91	8%	$ 91
• $50,000 to $69,999:	114	17%	$ 114
• $70,000 to $79,999:	96	6%	$ 96
• $80,000 to $99,999:	132	11%	$ 132
• $100,000 and above:	182	33%	$ 182

Type of Household	**Index**	**Marketshare**	**$ per HH**
• Married couples, no children:	126	28%	$ 126
• Married couples, oldest child under 6:	71	3%	$ 71
• Married couples, oldest child 6-to-17:	110	14%	$ 110
• Married couples, oldest child 18 or older:	168	12%	$ 168
• Single parent with child under 18:	48	3%	$ 47
• Single person:	74	22%	$ 74

Race and Ethnicity	**Index**	**Marketshare**	**$ per HH**
• Asian:	83	3%	$ 83
• Black:	87	11%	$ 87
• Hispanic:	109	13%	$ 109
• Non-Hispanic white and other:	101	77%	$ 101

Region	**Index**	**Marketshare**	**$ per HH**
• Northeast:	100	18%	$ 100
• Midwest:	98	22%	$ 98
• South:	88	32%	$ 88
• West:	121	27%	$ 121

Education	**Index**	**Marketshare**	**$ per HH**
• Less than high school graduate:	73	11%	$ 73
• High school graduate:	98	25%	$ 98
• Some college:	94	20%	$ 94
• Associates degree:	116	11%	$ 116
• Bachelors degree:	116	22%	$ 116
• Masters, doctoral degree:	111	11%	$ 111

Note: The index is the ratio of spending by each segment to the overall population. For example, an index of 100 indicates per household spending by a segment is equal to that of the average household. An index of 150 indicates spending by a segment is 50% higher than the average household. The marketshare is the percentage of total spending attributed by each segment.

"The biggest spenders on breakfast and brunch at full-service restaurants are older married couples enjoying a leisurely meal. Householders ages 55-to-74 spend 23% to 24% more than average on this item. Married couples without children at home (many of them empty-nesters) spend 26% more than average on breakfast and brunch at full-service restaurants. Couples with adult children at home spend 68% more than average on full-service breakfast, in part because their households are larger."

New Strategist

48.3 Breakfast at Quick-Service Restaurants

The following is a demographic assessment of consumer spending for breakfast at quick-service restaurants:

Age of Householder	**Index**	**Marketshare**	**$ per HH**
• Under age 25:	69	5%	$ 79
• 25-to-34:	116	20%	$ 134
• 35-to-44:	133	25%	$ 138
• 45-to-54:	122	26%	$ 136
• 55-to-64:	87	14%	$ 84
• 65-to-74:	74	8%	$ 67
• 75 and older:	27	2%	$ 30

Household Income	**Index**	**Marketshare**	**$ per HH**
• Under $20,000:	43	9%	$ 50
• $20,000 to $39,999:	78	17%	$ 90
• $40,000 to $49,999:	95	9%	$ 109
• $50,000 to $69,999:	94	14%	$ 109
• $70,000 to $79,999:	112	7%	$ 129
• $80,000 to $99,999:	133	11%	$ 153
• $100,000 and above:	181	32%	$ 209

Type of Household	Index	Marketshare	$ per HH
• Married couples, no children:	79	18%	$ 91
• Married couples, oldest child under 6:	164	7%	$ 189
• Married couples, oldest child 6-to-17:	148	19%	$ 171
• Married couples, oldest child 18 or older:	149	11%	$ 173
• Single parent with child under 18:	66	4%	$ 77
• Single person:	74	21%	$ 85

Race and Ethnicity	Index	Marketshare	$ per HH
• Asian:	82	3%	$ 95
• Black:	84	10%	$ 97
• Hispanic:	134	16%	$ 155
• Non-Hispanic white and other:	97	74%	$ 112

Region	Index	Marketshare	$ per HH
• Northeast:	126	23%	$ 145
• Midwest:	77	18%	$ 88
• South:	99	36%	$ 114
• West:	104	23%	$ 120

Education	Index	Marketshare	$ per HH
• Less than high school graduate:	82	12%	$ 95
• High school graduate:	91	23%	$ 105
• Some college:	96	21%	$ 111
• Associates degree:	119	11%	$ 137
• Bachelors degree:	110	20%	$ 128
• Masters, doctoral degree:	119	12%	$ 137

"The busiest people are the biggest spenders on breakfast at fast-food restaurants – workers and parents. Householders of prime working age, 25-to-54, spend 16% to 33% more than average on this item and account for 71% of the market. Married couples with children at home spend 51% more than average on breakfast at fast-food restaurants as they try to fit meals into their busy schedules. Hispanics spend 34% more than average on breakfast at fast-food restaurants."

New Strategist

48.4 Lunch at Full-Service Restaurants

The following is a demographic assessment of consumer spending for lunch at full-service restaurants:

Age of Householder	Index	Marketshare	$ per HH
• Under age 25:	60	4%	$ 177
• 25-to-34:	104	17%	$ 307
• 35-to-44:	109	21%	$ 322
• 45-to-54:	110	24%	$ 325
• 55-to-64:	101	17%	$ 297
• 65-to-74:	97	10%	$ 285
• 75 and older:	82	8%	$ 241

Household Income	Index	Marketshare	$ per HH
• Under $20,000:	44	9%	$ 131
• $20,000 to $39,999:	58	13%	$ 172
• $40,000 to $49,999:	77	7%	$ 226
• $50,000 to $69,999:	93	14%	$ 275
• $70,000 to $79,999:	114	7%	$ 336
• $80,000 to $99,999:	131	11%	$ 385
• $100,000 and above:	218	39%	$ 643

Type of Household	Index	Marketshare	$ per HH
• Married couples, no children:	123	27%	$ 362
• Married couples, oldest child under 6:	113	5%	$ 334
• Married couples, oldest child 6-to-17:	134	17%	$ 395
• Married couples, oldest child 18 or older:	135	10%	$ 396
• Single parent with child under 18:	47	3%	$ 140
• Single person:	70	20%	$ 206

Race and Ethnicity	Index	Marketshare	$ per HH
• Asian:	110	4%	$ 323
• Black:	47	6%	$ 139
• Hispanic:	90	10%	$ 266
• Non-Hispanic white and other:	110	84%	$ 323

Region	Index	Marketshare	$ per HH
• Northeast:	85	16%	$ 251
• Midwest:	78	18%	$ 230
• South:	119	43%	$ 350
• West:	104	23%	$ 308

Education	Index	Marketshare	$ per HH
• Less than high school graduate:	61	9%	$ 181
• High school graduate:	67	17%	$ 197
• Some college:	93	20%	$ 273
• Associates degree:	109	10%	$ 320
• Bachelors degree:	143	27%	$ 423
• Masters, doctoral degree:	166	17%	$ 490

"The biggest spenders on lunch at full-service restaurants are the same customers who spend big on full-service dinners – middle-aged married couples enjoying a leisurely meal. Householders ages 35-to-54 spend 9% to 10% more than average on this item. Married couples without children at home (many of them empty-nesters) spend 23% more than average on lunch at full-service restaurants. Couples with school-aged or adult children at home spend 34% to 35% more, in part because their households are larger than average."

New Strategist

48.5 Lunch at Quick-Service Restaurants

The following is a demographic assessment of consumer spending for lunch at quick-service restaurants:

Age of Householder	Index	Marketshare	$ per HH
• Under age 25:	94	6%	$ 365
• 25-to-34:	122	20%	$ 475
• 35-to-44:	127	24%	$ 492
• 45-to-54:	111	24%	$ 431
• 55-to-64:	94	15%	$ 364
• 65-to-74:	61	6%	$ 237
• 75 and older:	37	3%	$ 143

Household Income	Index	Marketshare	$ per HH
• Under $20,000:	48	10%	$ 186
• $20,000 to $39,999:	74	16%	$ 286
• $40,000 to $49,999:	90	8%	$ 348
• $50,000 to $69,999:	107	16%	$ 417
• $70,000 to $79,999:	124	7%	$ 480
• $80,000 to $99,999:	137	11%	$ 530
• $100,000 and above:	166	30%	$ 645

Type of Household	Index	Marketshare	$ per HH
• Married couples, no children:	91	20%	$ 355
• Married couples, oldest child under 6:	141	6%	$ 548
• Married couples, oldest child 6-to-17:	140	18%	$ 543
• Married couples, oldest child 18 or older:	153	11%	$ 593
• Single parent with child under 18:	90	5%	$ 351
• Single person:	62	18%	$ 240

Race and Ethnicity	Index	Marketshare	$ per HH
• Asian:	124	5%	$ 482
• Black:	81	10%	$ 315
• Hispanic:	111	13%	$ 429
• Non-Hispanic white and other:	101	77%	$ 393

Region	Index	Marketshare	$ per HH
• Northeast:	105	20%	$ 409
• Midwest:	88	20%	$ 343
• South:	101	37%	$ 393
• West:	105	24%	$ 409

Education	Index	Marketshare	$ per HH
• Less than high school graduate:	79	12%	$ 306
• High school graduate:	89	23%	$ 345
• Some college:	99	22%	$ 385
• Associates degree:	122	11%	$ 473
• Bachelors degree:	111	21%	$ 431
• Masters, doctoral degree:	120	12%	$ 465

"Workers and parents are the best customers of fast-food lunches. Householders of prime working age, 25-to-44, spend 22% to 27% more than average on this item and account for 44% of the market. Married couples with children at home spend 44% more than average on lunches at fast-food restaurants as they try to fit meals into their busy schedules. Asians spend 24% more than average on this item."

New Strategist

48.6 Dinner at Full-Service Restaurants

The following is a demographic assessment of consumer spending for dinner at full-service restaurants:

Age of Householder	**Index**	**Marketshare**	**$ per HH**
• Under age 25:	71	5%	$ 512
• 25-to-34:	99	17%	$ 714
• 35-to-44:	111	21%	$ 799
• 45-to-54:	116	25%	$ 838
• 55-to-64:	109	18%	$ 787
• 65-to-74:	87	9%	$ 627
• 75 and older:	61	6%	$ 436

Household Income	**Index**	**Marketshare**	**$ per HH**
• Under $20,000:	39	8%	$ 278
• $20,000 to $39,999:	57	13%	$ 414
• $40,000 to $49,999:	69	6%	$ 496
• $50,000 to $69,999:	91	14%	$ 657
• $70,000 to $79,999:	120	7%	$ 862
• $80,000 to $99,999:	140	12%	$ 1,009
• $100,000 and above:	226	40%	$ 1,627

Type of Household	Index	Marketshare	$ per HH
• Married couples, no children:	126	28%	$ 905
• Married couples, oldest child under 6:	104	5%	$ 746
• Married couples, oldest child 6-to-17:	134	17%	$ 964
• Married couples, oldest child 18 or older:	151	11%	$1,086
• Single parent with child under 18:	54	3%	$ 385
• Single person:	66	19%	$ 474

Race and Ethnicity	Index	Marketshare	$ per HH
• Asian:	141	5%	$1,017
• Black:	52	6%	$ 371
• Hispanic:	80	9%	$ 574
• Non-Hispanic white and other:	111	84%	$ 796

Region	Index	Marketshare	$ per HH
• Northeast:	118	22%	$ 849
• Midwest:	84	19%	$ 605
• South:	97	35%	$ 695
• West:	107	24%	$ 769

Education	Index	Marketshare	$ per HH
• Less than high school graduate:	41	6%	$ 298
• High school graduate:	70	18%	$ 503
• Some college:	93	20%	$ 670
• Associates degree:	110	10%	$ 794
• Bachelors degree:	148	28%	$1,067
• Masters, doctoral degree:	174	18%	$1,254

"The biggest spenders on dinners at full-service restaurants are middle-aged married couples enjoying a leisurely meal. Householders ranging in age from 35-to-64 spend 9% to 16% more than average on this item. Those with school-aged or adult children at home spend 34% to 51% more than average on this item."

New Strategist

48.7 Dinner at Quick-Service Restaurants

The following is a demographic assessment of consumer spending for dinner at quick-service restaurants:

Age of Householder	Index	Marketshare	$ per HH
• Under age 25:	100	7%	$ 343
• 25-to-34:	128	21%	$ 438
• 35-to-44:	135	26%	$ 461
• 45-to-54:	120	25%	$ 409
• 55-to-64:	75	12%	$ 258
• 65-to-74:	47	5%	$ 161
• 75 and older:	35	3%	$ 120

Household Income	Index	Marketshare	$ per HH
• Under $20,000:	48	10%	$ 166
• $20,000 to $39,999:	78	18%	$ 269
• $40,000 to $49,999:	89	8%	$ 304
• $50,000 to $69,999:	103	16%	$ 353
• $70,000 to $79,999:	125	8%	$ 429
• $80,000 to $99,999:	137	11%	$ 470
• $100,000 and above:	163	29%	$ 557

Type of Household	Index	Marketshare	$ per HH
• Married couples, no children:	78	17%	$ 267
• Married couples, oldest child under 6:	145	6%	$ 495
• Married couples, oldest child 6-to-17:	169	22%	$ 579
• Married couples, oldest child 18 or older:	162	12%	$ 555
• Single parent with child under 18:	93	5%	$ 317
• Single person:	51	15%	$ 174

Race and Ethnicity	Index	Marketshare	$ per HH
• Asian:	107	4%	$ 368
• Black:	106	13%	$ 364
• Hispanic:	110	13%	$ 378
• Non-Hispanic white and other:	98	74%	$ 334

Region	Index	Marketshare	$ per HH
• Northeast:	94	17%	$ 321
• Midwest:	103	24%	$ 352
• South:	106	38%	$ 362
• West:	93	21%	$ 318

Education	**Index**	**Marketshare**	**$ per HH**
• Less than high school graduate:	71	10%	$ 242
• High school graduate:	94	24%	$ 322
• Some college:	105	23%	$ 361
• Associates degree:	113	10%	$ 386
• Bachelors degree:	118	22%	$ 403
• Masters, doctoral degree:	98	10%	$ 334

"Families with children are the biggest spenders on dinners at fast-food restaurants. House-holders ages 25-to-54 spend 20% to 35% more than average on this item and account for 72% of the market. Married couples with children at home spend 63% more than average on dinner at fast-food restaurants as they try to fit meals into their busy schedules. Asians, Blacks, and Hispanics spend between 6% and 10% more than average on fast-food dinners."

New Strategist

48.8 Dining While Traveling

The following is a demographic assessment of consumer spending for dining (including takeout) while traveling:

Age of Householder	**Index**	**Marketshare**	**$ per HH**
• Under age 25:	37	3%	$ 88
• 25-to-34:	72	12%	$ 171
• 35-to-44:	103	19%	$ 243
• 45-to-54:	127	27%	$ 302
• 55-to-64:	140	23%	$ 332
• 65-to-74:	104	11%	$ 248
• 75 and older:	35	5%	$ 131

Household Income	Index	Marketshare	$ per HH
• Under $20,000:	27	6%	$ 65
• $20,000 to $39,999:	44	10%	$ 104
• $40,000 to $49,999:	63	6%	$ 149
• $50,000 to $69,999:	81	12%	$ 193
• $70,000 to $79,999:	106	6%	$ 252
• $80,000 to $99,999:	141	12%	$ 334
• $100,000 and above:	269	48%	$ 640

Type of Household	Index	Marketshare	$ per HH
• Married couples, no children:	157	35%	$ 372
• Married couples, oldest child under 6:	85	4%	$ 202
• Married couples, oldest child 6-to-17:	148	19%	$ 352
• Married couples, oldest child 18 or older:	152	11%	$ 363
• Single parent with child under 18:	52	3%	$ 123
• Single person:	53	15%	$ 125

Race and Ethnicity	Index	Marketshare	$ per HH
• Asian:	121	5%	$ 288
• Black:	32	4%	$ 75
• Hispanic:	62	7%	$ 148
• Non-Hispanic white and other:	117	89%	$ 277

Region	Index	Marketshare	$ per HH
• Northeast:	105	20%	$ 250
• Midwest:	94	22%	$ 223
• South:	84	30%	$ 199
• West:	128	29%	$ 305

Education	Index	Marketshare	$ per HH
• Less than high school graduate:	26	4%	$ 61
• High school graduate:	54	14%	$ 128
• Some college:	86	19%	$ 204
• Associates degree:	101	9%	$ 241
• Bachelors degree:	151	28%	$ 360
• Masters, doctoral degree:	255	26%	$ 607

“The biggest spenders on restaurant and carry-out meals on trips are the most avid travelers – older married couples. Householders ages 45-to-64 spend 27% to 40% more than average on this item. Married couples without children at home (most of them empty- nesters) spend 57% more than average on restaurant and carry-out meals on trips and control 35% of the market. Those with school-aged or older children at home spend 48% to 52% more. Asians, the most-affluent racial and ethnic group, spend 21% more than average on eating out while traveling. Non-Hispanic whites spent 17% more.”

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48.9 Snacks at Quick-Service Restaurants

The following is a demographic assessment of consumer spending for snacks at quick-service restaurants:

Age of Householder	Index	Marketshare	$ per HH
• Under age 25:	98	7%	$ 108
• 25-to-34:	131	22%	$ 145
• 35-to-44:	143	27%	$ 158
• 45-to-54:	112	24%	$ 125
• 55-to-64:	74	12%	$ 83
• 65-to-74:	55	6%	$ 61
• 75 and older:	23	2%	$ 26

Household Income	Index	Marketshare	$ per HH
• Under $20,000:	43	9%	$ 47
• $20,000 to $39,999:	68	15%	$ 75
• $40,000 to $49,999:	91	8%	$ 101
• $50,000 to $69,999:	101	15%	$ 112
• $70,000 to $79,999:	108	7%	$ 120
• $80,000 to $99,999:	154	13%	$ 171
• $100,000 and above:	182	33%	$ 202

Type of Household	Index	Marketshare	$ per HH
• Married couples, no children:	85	19%	$ 94
• Married couples, oldest child under 6:	157	7%	$ 175
• Married couples, oldest child 6-to-17:	182	23%	$ 202
• Married couples, oldest child 18 or older:	148	11%	$ 164
• Single parent with child under 18:	87	5%	$ 96
• Single person:	59	17%	$ 65

Race and Ethnicity	Index	Marketshare	$ per HH
• Asian:	80	3%	$ 89
• Black:	57	7%	$ 63
• Hispanic:	89	10%	$ 99
• Non-Hispanic white and other:	108	82%	$ 120

Region	Index	Marketshare	$ per HH
• Northeast:	108	20%	$ 120
• Midwest:	91	21%	$ 101
• South:	80	29%	$ 89
• West:	135	30%	$ 150

Education	Index	Marketshare	$ per HH
• Less than high school graduate:	55	8%	$ 61
• High school graduate:	83	21%	$ 92
• Some college:	101	22%	$ 113
• Associates degree:	116	11%	$ 128
• Bachelors degree:	128	24%	$ 143
• Masters, doctoral degree:	134	14%	$ 149

"Parents are the best customers of snacks from fast-food restaurants. Householders ages 25-to-44, most with children, spend 31% to 43% more than the average household on fast-food snacks. Married couples with children at home spend two-thirds more than average on this item, the figure peaking at 82% above average among parents with school-aged children."

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48.10 Spending by Age

Not surprisingly, middle-aged consumers spend the most at restaurants because they have the highest incomes and typically the largest households. Overall, householders ages 35-to-54 spend 17% to 21% more than average.

Older consumers, particularly empty-nesters, are far more likely to choose full-service over quick-service restaurants.

Among householders under age 25, fast-food meals claim 60% of the restaurant budget. The fast-food share declines with age and drops below the full-service share in the 45-to-54 age group. The need to provide meal options for children is one reason for this shift in restaurant preference.

Among household types, single parents with children devote the largest share of their dining-out spending to quick-service restaurants (49%). In contrast, married couples without children at home (most of them empty-nesters) spend only 30% of their restaurant dollars at fast-food establishments.

48.11 Spending by Household Income

Affluent households spend much more than average at restaurants. Householders with incomes of $100,000 or more spend nearly twice the average at restaurants. While accounting for only 18% of total households, the $100,000-plus income group accounts for 36% of spending for dining out. These affluent households account for 48% of spending for dinner at full-service restaurants and 48% of spending for restaurant food while traveling.

48.12 Spending by Household Type

Married couples with school-aged or older children at home spend more eating out than any other household type – 49% to 51% more than average. Married couples without children at home spend more than average on full-service meals for all dayparts.

48.13 Spending by Race and Ethnicity

Asian households spend 18% more than the average household on restaurant meals – more than any other racial or ethnic group. Hispanic households spend 16% less than average; African-American households spend 33% less than average.

48.14 Spending by Region

Restaurant spending is highest in the West and lowest in the Midwest. Households in the Northeast are the biggest spenders on full-service dinners (14% above average) and quick-service breakfast (26% above average), but spend 15% less than average on full-service lunches.

48.15 Spending by Education

Spending on eating out rises with education, in part, because educated householders typically have higher incomes. College graduates spend 39% more than the average householder at restaurants, spending 51% to 57% above average on full-service lunches and dinners. College graduates, who comprise 29% of households, account for more than 40% of spending on full-service lunches and dinners.

48.16 Market Resources

New Strategist, P.O. Box 242, Ithaca, NY 14851. (800) 848-0842. (www.newstrategist.com)

49

CUSTOMER PROFILE

49.1 Restaurant Visits By Age

According to The NPD Group (www.npd.com), the number of meal and snack dining-out occasions, by age, in 2012, and for comparison in 2010, are as follows:

	2010	2012
• Under 18:	145	144
• 18-to-34:	219	204
• 35-to-49:	224	219
• 50-to-64:	217	218
• 65 and older:	182	195
• All consumers:	197	194

"The proportion of the commercial foodservice industry's traffic obtained from visits made by older consumers has grown steadily over the past five years while visits from Millennials have declined. Baby Boomers and Seniors are making more visits to every segment of the restaurant industry than prior to the recession."

The NPD Group, 10/15/12

In 2012, the visit rate for older restaurant consumers was the same as for younger consumers. Baby Boomers and Seniors increased their share of restaurant traffic by six percentage points since 2008 and Millennials decreased their share of traffic by six percentage points.

> **"Considering visits per capita, older Boomers are now heavier users [most frequent] of restaurant morning meals and supper than any other age group."**
>
> *Boomers and Beyond – Targeting for Success*
> The NPD Group, 10/12

49.2 The Full-Service Dining Customer

According to Scarborough Research (www.scarborough.com), for casual- or fine-dining restaurant patrons who dine out at least six times monthly (e.g., frequent diners), distribution by age is as follows:

- 18-to-24: 13%
- 25-to-34: 17%
- 35-to-44: 19%
- 45-to-54: 20%
- 55-to-64: 16%
- 65 and older: 16%

Frequent diners skew decidedly upscale; they are 1.7 times more likely than the total population to have a household income of at least $150,000. Also, they are less likely to have young children; 65% of frequent diners have no kids, compared with 59% of all adults.

49.3 The Quick-Service Dining Customer

Sandelman & Associates (www.sandelman.com) provides the following profile of quick-service restaurant (QSR) customers:

Gender
- Male: 54%
- Female: 46%

Age
- 16-to-18: 6%
- 19-to-24: 18%
- 25-to-34: 21%
- 35-to-44: 27%

- 45-to-54: 19%
- 55-to-64: 9%

Marital Status
- Married: 50%
- Single: 39%
- Divorced/widowed: 11%

Household Income
- Less than $30,000: 27%
- $30,000 to $39,999: 14%
- $40,000 to $49,999: 12%
- $50,000 to $74,999: 22%
- $75,000 or more: 24%

Ethnicity
- White: 72%
- Hispanic: 11%
- Black: 10%
- All other: 8%

According to International Demographics (www.themediaaudit.com), the heaviest consumers of QSR meals are those 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.

49.4 Regular Customers

According to the *Operator Survey*, by the National Restaurant Association (www.restaurant.org), repeat customers account for an average of 75% of sales at family-dining and quick-service restaurants, 70% of sales at casual-dining restaurants, and 60% at fine-dining operations.

"Regulars pay the rent. From a bottom-line standpoint, they're critical. You can spend a lot of money on advertising, but if you pay close attention to keeping your current customers happy, they'll do a lot of advertising for you and you'll spend a lot less money."

Joan Simon, Principal
Full Plate Restaurant Consulting
Restaurant Business

49.5 Families Dining Out

According to The NPD Group, families dining out with children account for 14 billion meals and snacks sold at restaurants and $70 billion in annual sales.

Approximately 35% of restaurant visits are made by parties with kids. Of these visits, 81% are made to quick-service restaurants, 10% to casual-dining restaurants, and 9% to family-dining restaurants.

49.6 Value-Focused Customers

The Influence of Income Consumer Trend Report, an October 2012 study by Technomic (www.technomic.com), reported that for middle-income consumers, low prices are the most important factor – more so than convenient location, fast service, and order accuracy – when it comes to deciding which limited-service, dine-in restaurants to patronize.

"The middle-income group as a whole expressed a desire to dine out more often than they currently do, which may explain why low cost is a high priority. Seventy-one percent (71%) of upper-middle consumers said they use restaurants as social venues to catch up with friends and family."

Aimee Harvey, Editor
Technomic, 10/5/12

An April 2012 report by The NPD Group similarly reported that middle income consumers place emphasis on value in dining but also found that upper income consumers are watching their restaurant spending.

> **"A gap has been growing between American consumers who are financially secure and those who are not. But the two groups have something in common: Both are cutting back on their number of restaurant visits. The NPD Group reveals that adults who are visiting restaurants less often than last year increasingly include both the financially strained and the financially comfortable."**
>
> *Nation's Restaurant News*, 4/30/12

The NPD Group found that more than one-half of consumers consider themselves 'financially strained.' Among this group, 54% say they are cutting back on dining out. Twenty-nine percent (29%) of those who consider themselves 'financially comfortable' say they are cutting back on dining out.

49.7 What Customers Want

In surveys by The NPD Group, customers said the following were what they seek most from restaurants:

Casual-Dining

- Tasty food
- Good value
- No cooking
- No clean up
- Enjoyable experience
- Time with friends and family

Quick-Service Restaurants

- No cooking
- Good value
- Speed
- Inexpensive meal
- Tasty food
- Cheap outing

50

CUSTOMER SATISFACTION

50.1 Overview

Surveys by Service Management Group (SMG, www.smg.com) assess various aspects of customer satisfaction at restaurants. The surveys query customers based on their most recent restaurant visit and compare various factors that relate to customer satisfaction.

50.2 Factors Contributing To High Customer Satisfaction

The following are findings based on SMG surveys:

Age Demographic

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

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

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

Service Management Group

Alcoholic Beverage Consumption While Dining

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

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

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

Service Management Group

Corporate Headquarters Markets

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

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

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

Service Management Group

Corporate-Owned vs. Franchise-Owned Locations

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

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

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

Day-Of-Week

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

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

> **"On weekends, higher volumes and higher expectations for 'destination' trips can raise the bar for service excellence, resulting in less satisfied customers."**
>
> Service Management Group

Dining Room vs. Bar Area Dining

Restaurant patrons compare their table service as follows:

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

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

Service Management Group

Dining With Children

Customers dining with children rate their dining experience as follows:

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

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

Service Management Group

Dine-In vs. Drive-Thru

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

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

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

Service Management Group

First-Time vs. Returning Customers

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

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

Gift Card Use

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

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

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

Service Management Group

Guest Experience and Tipping

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

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

Manager Presence

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

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

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

Service Management Group

Newer vs. Older Restaurants

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

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

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

Service Management Group

Ordering Takeout

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

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

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

Service Management Group

Party Size

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

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

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

Service Management Group

Problem Resolution

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

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

> **"Fine- and casual-dining operators resolve problems better than their fast-casual and fast-food counterparts because they have more interaction with guests."**
>
> Service Management Group

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 choose the restaurant they most recently visited for the following reason:

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

"Nothing guarantees a return visit like a great dining experience."

Service Management Group

Rural vs. Urban Locations

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

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

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

Service Management Group

Special Occasions

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

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

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

Service Management Group

Steakhouse Customer Satisfaction

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

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

“At steakhouses, correct preparation is everything.”

Service Management Group

Sub Shop Customer Satisfaction

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

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

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

Service Management Group

Suggestive Selling

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

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

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

Service Management Group

Type Of Service

By restaurant segment, the percentage of customers experiencing a problem are 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

50.3 Market Resources

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

51

HISPANIC-AMERICAN CUSTOMERS

51.1 Overview

Census 2010 counted 50.5 million Hispanics in the United States, or 16.3% of the total population. The nation's Latino population, which was 35.3 million in 2000, grew 43% over the decade. The Hispanic population also accounted for 56% of the nation's growth from 2000 to 2010.

While some regions of the U.S. have long had a high concentration of Hispanic-Americans, such as Florida and the states bordering Mexico, the influx into other areas has been rapid. In the Pacific Northwest, for instance, the Hispanic population increased 71% between the 2000 and 2010 censuses. In such regions, restaurateurs have been scurrying to develop programs that properly cater to the changing population mix.

The rise of the Hispanic population in the United States has spurred a focus among many restaurateurs on developing menus and promotions that appeal to Hispanic-Americans.

51.2 Market Assessment

According to *Latino Foodservice Trends in the U.S.*, a report by Packaged Facts (www.packagedfacts.com), the share of restaurant sales from Hispanic patrons is on the upswing, with growth of 4.7% in 2011, almost double that of U.S. consumers generally.

> **"It's no longer a secret that U.S. Hispanics, who make some 6 billion restaurant visits and spend $30 billion annually, are critical to the health of the restaurant industry."**
>
> *Nation's Restaurant News*, 9/17/12

51.3 Hispanic Restaurant Patronage

According to The NPD Group (www.npd.com), Hispanics traditionally frequent restaurants more than other ethnic groups. As recently as 2009, Hispanic visits to restaurants outpaced those of Caucasians by 4% and of African-Americans by 6%. The economic downturn affected many Hispanic-Americans and their restaurant patronage declined. In 2012, Hispanic restaurant visits to restaurants were 44.0 per capita compared to 48.1 per capita for non-Hispanics.

"This recession has been harder on Hispanics than the general population, and that's reflected in restaurant patronage. It's a fragile market."

Michele Schmal, Analyst
The NPD Group
Nation's Restaurant News, 10/17/12

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

	Non-Hispanics	English-Speaking Hispanics	Less Acculturated Hispanics
• Lunch:	35%	34%	23%
• Supper:	33%	32%	24%
• Morning meal:	18%	18%	31%
• P.M. snack:	15%	15%	22%

"When it comes to their dining-out behavior, Hispanics tend to use restaurants more often for snacks than the average consumer, and less often than average for main meals such as dinner."

Arnie Schwartz,
President of Foodservice
The NPD Group, 5/2/11

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

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

"Food and beverages play a central role in the preservation of Hispanic culture and reconnection for family; as a result, Hispanics view mealtime, nutrition, and healthy eating differently than non-Hispanics. Going for seconds, for instance, is encouraged and welcomed, and conveys that a person 'eats well' and has a good appetite, which is a symbol of good health."

Terry Soto, President
About Marketing Solutions, 10/8/12

51.4 Hispanic Menu Preferences

A panel on "Developing Products for the Hispanic Market" at the May 2012 conference of the Research Chefs Association (www.culinology.com) discussed Hispanic-focused menu trends. The following is a summary of comments made by leading chefs:

- Hispanics like a lot of flavor in their food and value the presentation on the plate, according to Fernando Desa, executive chef at Goya Foods.
- According to Jonathan Rogan, executive chef of El Pollo Loco, value, flavor, and perceived healthfulness are the three main pillars of restaurant cuisine that appeal to the Hispanic consumer. The Hispanic population is more prone to diabetes than the general population, so restaurants need to offer some healthful options.
- Hispanic customers value an authentic restaurant experience. According to Mark Miller, chef and restaurant consultant, "When you look at the Hispanic marketplace, you have to be very careful that you aren't selling a product without that product being designed for their culture, for their social-psycho dynamic, and for their value system."

- Peruvian is poised to be the “next big thing” among Hispanic-American consumers. A fusion of Asian cuisine with a little Spanish cuisine, Peruvian cuisine is very tropical and refreshing with a wide variety of chilies and a lot of freshness with fish preparations. Elizabeth Johnson-Kossick, chef instructor and Latin cuisine specialist at the Culinary Institute of America’s San Antonio campus, pointed out that Peruvian food also has a lot of visual freshness and flavor profiles with pepper pastes.

52

MILLENNIAL CUSTOMERS

52.1 Overview

Most analysts classify those born from 1982 thru 2000, a span of 20 years, as the Millennial generation (also known as Generation Y or Echo Boomers). In 2013, Millennials spanned ages 13 through 31. Census 2010 counted 93.40 million Americans born between 1980 and 2000, representing 30.3% of the population. Some analysts extend the upper bound of the Millennial generation to 1976, including those turning 37 in 2013.

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.

Estimates of Millennial buying power range between $170 billion and $200 billion. By 2017, their buying power is projected to eclipse that of Baby Boomers.

“Millennials tend to be holding their own in terms of discretionary spending at restaurants, and when the generations fortunes turn positive with more economic recovery, it potentially could prove a boon for the industry.”

Peter Francese
Demographic Trends Analyst
Ogilvy & Mather
Nation’s Restaurant News, 4/18/12

52.2 Restaurant Visits By Millennials

According to The NPD Group (www.npd.com), Millennials averaged 204 meal and snack dining-out occasions at restaurants in 2012. For comparison, adults ages 35-to-64 averaged 219 restaurant visits.

In a June 2012 survey by Service Management Group (SMG, www.smg.com), 33% of Millennials said they intended to visit fine-dining restaurants more frequently in the next 12 months. For comparison, 25% of Generation Xers and 13% of Baby Boomers said so.

Understanding the Foodservice Attitudes & Behaviors of Millennials, a November 2012 study by Technomic (www.technomic.com), reported the following characteristics of Millennial dining at restaurants:

- Forty-one percent (41%) of Millennials purchase food away from home at least twice a week, compared to 38% of Gen Xers and 37% of Baby Boomers.
- Forty-eight percent (48%) of Millennials compared to 47% of Gen Xers and 31% of Baby Boomers strongly agree that they have a diverse social network. Of those Millennials, 67% say it makes them more interested in ethnic foods.
- Fifty-nine percent (59%) of Millennials say they look up restaurant menus online often or very often via a computer and 19% do so using a mobile device.
- Twenty percent (20%) of Millennials say that it is important for restaurants to serve alcoholic beverages compared to 12% of Gen Xers and 10% of Baby Boomers who say so.

52.3 Dining Priorities

The following are findings of recent market surveys that provide insight into Millennial dining expectations:

- Convenience matters most to Millennial consumers in their dining experience, according to an April 2012 poll of restaurant market analysts by *Nation's Restaurant News*. Convenience also ranks as the top consideration among Generation Xers; Baby Boomers place the highest priority on restaurant service style. In addition to convenience, Millennials place emphasis on restaurant atmosphere, brand authenticity, personal connection with a brand, and service style also rated high in the poll. (Note: food quality was not a consideration in the dining experience poll; that was considered a given when eating out.)
- In a March 2012 survey by SMG, 42.6% of Millennials said they eat out because of convenience and time constraints; 30.4% of consumers overall said so.

"Compared with older generations, Millennials are much more likely to eat out because they don't have time to prepare a meal at home."

SMG, 3/12

- According to WD Partners (www.wdpartners.com), Millennials want a social experience above all else when visiting a restaurant or bar. For comparison, food quality is the single most important aspect of the dining experience for Baby Boomers.
- A recent survey by the School of Hospitality at Georgia State University found that 45% of Millennials are willing to spend 50¢ more per meal when dining out for organic menu options' 30% would pay an additional $1.

52.4 Restaurant Interactions Online and Mobile

Millennials are more likely than any other generation to follow and interact with restaurants online.

"More than half of Millennials surveyed [by SMG], or 52.8%, said they like checking out brands on social media sites like Facebook and Twitter, while only 36.2% of non-Millennials do. Just over 33% of Millennials said they like a brand more when that brand uses social media, compared with only 17.4% of the older comparison group."

Nation's Restaurant News, 9/12/11

Dennis Lombardi, Executive Vice President at WD Partners, suggests that a social-media strategy is important to attract Millennial customers.

"This is not a lost generation in terms of opportunities to bring them to a restaurant. You have to manage your brand's social image online as a great place to meet. If you're getting slammed consistently on Yelp and other review sites, you're going to have a hard time bringing in Millennials."

Dennis Lombardi
Executive Vice President
WD Partners
Nation's Restaurant News, 4/18/12

According to a recent survey by Technomic, 60% of Millennials have ordered from a restaurant online; only 35% of those age 35 and older have done so.

53

RESTAURANT & MENU PREFERENCES

53.1 Why Consumers Dine Out

Consumers dine out for various reasons and occasions. A December 2012 survey by Technomic (www.technomic.com) aimed to better understand consumer behavior, preferences, and attitudes regarding a variety of dining occasions. Findings were as follows:

- More than any other factor, 69% of consumers report that dining with friends contributes to a fun, exciting restaurant experience.
- Fifty percent (50%) of all foodservice occasions are driven by cravings; among males ages 18-to-24 this figure is 59%.
- While 58% of convenience-driven meal occasions are for takeout or delivery, 42% are for dine-in, indicating that speed of service is also a key factor for dine-in occasions.
- When having a regular meal with family or friends, 58% of consumers prefer comfort foods.
- Seventy percent (70%) of customers say they order shareable meals so they can try more than one item on the menu.
- Fifty-five percent (55%) of consumers look for combo meals when seeking strong overall value for their money at restaurants and other foodservice locations.

> **"Consumers decide to eat away from home for many different reasons. Restaurants that genuinely understand consumers' most significant visit drivers can take important steps to tweak their operations and win incremental business."**
>
> Darren Tristano, Executive V.P.
> Technomic, 12/4/12

53.2 Factors In Choosing A Restaurant

Harris Interactive (www.harrisinteractive.com) surveyed adults across the U.S. to ascertain preferences in their selection of restaurants. Responses were as follows:

Casual-Dining Restaurants

	Extremely Important	Very Important	Important	Somewhat Important	Not at All Important
• The restaurant's prices were in the range of what I wanted to spend:	20%	28%	36%	12%	5%
• I was in the mood for the type of food or cuisine offered:	16%	28%	37%	15%	4%
• The restaurant's location was convenient for me:	12%	25%	41%	16%	6%
• The restaurant menu has a broad variety of menu items:	11%	26%	41%	16%	6%
• The restaurant offered a specific menu item that I was hungry for:	11%	22%	37%	18%	11%
• They offered healthful menu items that fit my dietary needs:	8%	15%	32%	24%	21%
• I was interested in the restaurant's special offer:	7%	14%	30%	24%	25%
• I usually choose this restaurant chain when I go out for a meal:	5%	11%	31%	28%	24%
• The restaurant menu usually has new items to choose from:	4%	10%	29%	31%	25%

Quick-Service Restaurants

	Extremely Important	Very Important	Important	Somewhat Important	Not at All Important
• The restaurant's prices were in the range of what I wanted to spend:	22%	27%	33%	12%	5%
• The restaurant's location was convenient for me:	19%	29%	34%	14%	4%
• I was in the mood for the type of food or cuisine offered:	15%	26%	37%	16%	6%
• The restaurant offered a specific menu item that I was hungry for:	13%	23%	36%	17%	10%
• The restaurant menu has a broad variety of menu items:	9%	20%	38%	22%	11%
• I was interested in the restaurant's special offer:	7%	15%	26%	27%	25%
• They offered healthful menu items that fit my dietary needs:	7%	12%	27%	26%	27%

• I usually choose this restaurant chain when I go out for a meal:	4%	12%	30%	29%	24%
• The restaurant menu usually has new items to choose from:	3%	8%	24%	30%	35%

53.3 Factors In Choosing A Menu Item

The Harris Interactive survey also asked consumers preferences for menu items. Responses were as follows:

Casual-Dining Restaurants

	Extremely Important	Very Important	Important	Somewhat Important	Not at All Important
• The price was within my budget:	23%	22%	27%	14%	11%
• It's what I usually order at the restaurant:	12%	15%	32%	15%	19%
• The menu item was prominently featured on the menu with a description:	9%	15%	31%	15%	25%
• The menu item was prominently featured on the menu with a picture:	6%	11%	28%	16%	31%
• The menu item was discounted for a limited time only:	6%	10%	20%	13%	36%
• I ordered the item based on a recommendation from a friend or family member:	4%	10%	18%	17%	40%
• The menu item was available for a limited time only:	3%	7%	16%	14%	44%
• I ordered the menu item based on a recommendation from the server:	2%	4%	17%	21%	44%

Quick-Service Restaurants

	Extremely Important	Very Important	Important	Somewhat Important	Not at All Important
• The price was within my budget:	23%	21%	29%	10%	4%
• It's what I usually order at the restaurant:	18%	21%	30%	15%	5%
• The menu item was discounted for a limited time only:	7%	8%	18%	13%	16%
• The menu item was prominently featured on the menu with a picture:	6%	12%	25%	18%	8%
• The menu item was prominently featured on the menu with a description:	6%	11%	23%	21%	7%

• The menu item was available for a limited time only:	4%	6%	13%	13%	18%
• I ordered the item based on a recommendation from a friend or family member:	3%	5%	15%	14%	19%
• I ordered the menu item based on a recommendation from the server:	1%	4%	9%	13%	21%

54

SOCIAL NETWORKING

54.1 Overview

Networking with customers on social networks is important for restaurant brand-building.

> **"Social media is the great equalizer, allowing smaller brands to battle the largest players in the restaurant industry for the attention – and hopefully the dining out dollars – of consumers."**
>
> *Nation's Restaurant News*, 2/15/12

DigitalCoCo (www.digitalcoco.com), a social media analytics and digital branding firm, tracks the social media activities of consumers related to restaurant brands they follow and friend. As of February 2013, DigitalCoCo was tracking 41 million U.S. consumers and their social media relationships with 4,451 restaurant brands with 179,561 U.S. locations. The company also monitors restaurant brand-related social media activity in Canada, Europe, and the Middle East.

54.2 Restaurant Social Media Index

Computed quarterly by DigitalCoCo and presented by *Nation's Restaurant News*, the Restaurant Social Media Index (RSMI, http://rsmindex.com/) is based on an analysis of restaurant and consumer social media activities.

Ranked by RSMI score, the following restaurant brands had the strongest social media presence in third quarter 2012:

1. Starbucks: 250.26
2. Panera Bread: 240.21
3. Wendy's: 230.87
4. Red Mango: 227.63

5.	Chipotle Mexican Grill:	221.78
6.	Jimmy John’s:	211.54
7.	McDonald’s:	211.39
8.	Buffalo Wild Wings:	208.77
9.	Chick-fil-A:	208.33
10.	Bonefish Grill:	207.91
11.	Subway:	207.84
12.	Hard Rock Cafe:	205.66
13.	Pizza Hut:	204.32
14.	Taco Bell:	203.53
15.	Hooters:	203.43
16.	Firehouse Subs:	201.66
17.	Sonic:	199.31
18.	Outback Steakhouse:	198.88
19.	Applebee’s:	198.60
20.	KFC:	198.20
21.	Olive Garden:	196.73
22.	Chili’s Grill & Bar:	195.78
23.	Pinkberry:	193.66
24.	Red Robin Gourmet Burgers:	191.94
25.	Peet’s Coffee & Tea:	191.86
26.	Shake Shack:	189.77
27.	Dunkin’ Donuts:	189.54
28.	Tasti D-Lite:	189.28
29.	The Cheesecake Factory:	189.01
30.	Which Wich:	187.25
31.	Papa John’s:	186.25
32.	El Pollo Loco:	185.77
33.	Noodles & Company:	184.88
34.	Maggiano’s Little Italy:	183.21
35.	Boudin Bakery:	182.77
36.	Burger King:	180.91
37.	The Coffee Bean & Tea Leaf:	180.55
38.	Domino’s Pizza:	180.11
39.	Baskin-Robbins:	179.91
40.	Jamba Juice:	179.83
41.	Cinnabon:	179.82
42.	AJ Bombers:	179.22
43.	Dairy Queen:	178.98
44.	Texas Roadhouse:	178.90
45.	Carl’s Jr.:	178.35
46.	Arby’s:	178.27
47.	Wolfgang Puck:	178.20
48.	Denny’s:	178.17

49.	Wingstop:	177.71
50.	Sweetgreen:	176.88
51.	Auntie Anne's Hand-Rolled Soft Pretzels:	176.07
52.	Native Foods Cafe:	175.77
53.	Cold Stone Creamery:	175.54
54.	Red Lobster:	175.44
55.	Caribou Coffee:	175.36
56.	Qdoba Mexican Grill:	173.58
57.	Buca di Beppo:	173.32
58.	Pei Wei Asian Diner:	171.37
59.	Smashburger:	171.37
60.	Quiznos:	170.97
61.	Souplantation & Sweet Tomatoes:	170.97
62.	Popeyes Louisiana Kitchen:	170.87
63.	Taco John's:	170.32
64.	Five Guys Burgers and Fries:	169.89
65.	Tijuana Flats:	169.77
66.	P.F. Chang's China Bistro:	169.54
67.	Veggie Grill:	168.76
68.	Johnny Rockets:	168.64
69.	Dave & Buster's:	168.30
70.	Whataburger:	168.21
71.	Rainforest Cafe:	168.02
72.	Wow Bao:	167.81
73.	Twisted Root Burger Co.:	166.97
74.	Tropical Smoothie Cafe:	166.97
75.	In-N-Out Burger:	166.96
76.	Anthony's Coal Fired Pizza:	166.75
77.	T.G.I. Friday's:	166.67
78.	Chop't Creative Salad Company:	166.63
79.	Mellow Mushroom:	166.19
80.	McAlister's Deli:	165.88
81.	Bubba Gump Shrimp Co.:	165.69
82.	Tender Greens:	165.54
83.	Uno Chicago Grill:	165.08
84.	Yard House:	164.81
85.	Moe's Southwest Grill:	164.81
86.	Pizza Fusion:	164.65
87.	Rubio's:	164.21
88.	LYFE Kitchen:	163.92
89.	Potbelly Sandwich Shop:	163.80
90.	Hardee's:	163.77
91.	Romano's Macaroni Grill:	163.70
92.	Twin Peaks:	163.66

93.	Alamo Drafthouse Cinema:	163.66
94.	Baja Fresh Mexican Grill:	163.65
95.	Jason's Deli:	163.28
96.	Raising Cane's:	163.15
97.	Nando's Peri-Peri USA:	163.08
98.	Lime Fresh Mexican Grill:	163.08
99.	IHOP Restaurant:	162.72
100.	Zaxby's:	162.62

54.3 Facebook

The 100 restaurant brands with the largest following on Facebook had a combined 123.34 million unique fans (i.e., those indicating a 'like' for the brand) during the third quarter 2012. On average, fans indicated a 'like' for 1.8 restaurant brands.

Restaurant brands with the most Facebook fans in third quarter 2012 were as follows:

1.	Starbucks:	32,073,678
2.	McDonald's:	23,138,461
3.	Subway:	16,613,571
4.	Taco Bell:	9,295,239
5.	Buffalo Wild Wings:	8,842,668
6.	Pizza Hut:	8,387,929
7.	Dunkin' Donuts:	7,417,247
8.	Domino's Pizza:	7,248,935
9.	Chick-fil- A:	6,358,000
10.	Burger King:	5,616,335
11.	Baskin Robins:	5,435,109
12.	KFC:	5,391,395
13.	Dairy Queen:	5,250,683
14.	Krispy Kreme:	4,432,409
15.	Applebee's:	3,411,259
16.	Olive Garden:	3,210,018
17.	Cheesecake Factory:	2,969,071
18.	In-N-Out Burger:	2,864,828
19.	Hard Rock Cafe:	2,768,036
20.	Chili's:	2,761,635
21.	Panda Express:	2,739,254
22.	Papa John's Pizza:	2,615,525
23.	Wendys:	2,526,465
24.	IHOP Restaurants:	2,398,843
25.	Hooters:	2,367,306
26.	Outback Steakhouse:	2,217,934
27.	Red Lobster:	2,175,893
28.	Sonic Drive-in:	2,050,432

29.	Tim Hortons:	1,943,804
30.	Coldstone Creamery:	1,926,634
31.	Chipotle:	1,891,363
32.	Texas Road House:	1,617,491
33.	Arby's:	1,557,474
34.	Jamba Juice:	1,486,788
35.	Little Caesars Pizza:	1,341,900
36.	Jimmy John's:	1,294,311
37.	Panera Bread:	1,254,656
38.	Carl's Jr.:	1,130,623
39.	T.G.I. Friday's:	1,121,426
40.	Wawa:	929,736
41.	Ruby Tuesday:	893,923
42.	CiCis Pizza:	883,083
43.	Whataburger:	879,301
44.	Quiznos:	797,211
45.	Hardee's:	782,328
46.	Five Guys Burgers and Fries:	771,044
47.	Cinnabon:	750,884
48.	Einstein Bros Bagels:	720,798
49.	Auntie Anne's:	714,817
50.	Rita's Italian Ice:	714,196
51.	Cracker Barrel:	706,910
52.	Jack In The Box:	688,227
53.	P.F. Chang's:	661,972
54.	Red Mango:	627,321
55.	White Castle:	602,539
56.	Red Robin Gourmet Burgers:	564,807
57.	Denny's:	560,242
58.	Zaxby's Restaurant:	542,719
59.	Yogen Fruz:	504,889
60.	Dave & Buster's:	442,959
61.	BJ's Restaurant & Brewhouse:	433,918
62.	Del Taco:	419,021
63.	Chuck E. Cheese's:	398,731
64.	Pink Berry:	384,213
65.	Longhorn Steakhouse:	354,601
66.	California Pizza Kitchen:	339,354
67.	Caribou Coffee:	334,096
68.	Culver's:	323,250
69.	Popeyes Louisiana Kitchen:	304,708
70.	Firehouse Subs:	304,464
71.	Golden Corral:	290,649
72.	Smoothie King:	283,072

73.	Romano's Macaroni Grill:	279,700
74.	Bojangles:	277,418
75.	YogurtLand:	274,651
76.	Steak 'n Shake:	272,141
77.	Raising Cane's:	271,451
78.	Hungry Jack's:	267,165
79.	Elephant Bar Restaurants:	266,001
80.	The Coffee Bean & Tea Leaf:	265,427
81.	Famous Daves Bar-B-Que of America:	246,898
82.	Moes Southwest Grill:	236,934
83.	Bruegger's Bagels:	220,595
84.	Buca di Beppo:	212,349
85.	The Melting Pot Restaurants, Inc.:	206,578
86.	Taco Cabana:	192,144
87.	Bob Evans:	188,555
88.	Papa Murphy's Pizza:	185,741
89.	Tropical Smoothie Cafe:	181,383
90.	Bonefish Grill:	175,570
91.	Peet's Coffee & Tea:	172,021
92.	Wienerschnitzel:	168,210
93.	Wingstop:	165,574
94.	McAlister's Deli:	157,632
95.	Krystal's:	156,619
96.	On The Border Mexican Grill & Cantina:	152,230
97.	Which Wich:	151,850
98.	A&W Restaurants, Inc.:	148,135
99.	Island Grill:	140,387
100.	Noodles & Company:	139,520

54.4 Twitter

The restaurant brands with the most followers on Twitter during the third quarter 2012 were as follows:

1.	Starbucks:	2,942,617
2.	Subway:	730,630
3.	McDonald's:	685,893
4.	Taco Bell:	261,491
5.	Hard Rock Cafe:	221,313
6.	Chick-fil- A:	196,889
7.	Dunkin' Donuts:	174,426
8.	Buffalo Wild Wings:	160,471
9.	Domino's Pizza:	147,552
10.	Pizza Hut:	133,321
11.	Wendys:	124,374

12.	Chipotle:	120,397
13.	KFC:	106,426
14.	The Coffee Bean & Tea Leaf:	101,612
15.	Jimmy John's:	100,511
16.	Baja Fresh:	84,847
17.	Red Mango:	70,228
18.	Arby's:	68,632
19.	Burger King:	67,369
20.	Chili's:	65,561
21.	Cheesecake Factory:	60,478
22.	Veggie Grill:	59,930
23.	Papa John's Pizza:	59,772
24.	BJ's Restaurant & Brewhouse:	56,001
25.	Panera Bread:	54,114
26.	Whataburger:	50,147
27.	P.F. Chang's:	45,969
28.	Dairy Queen:	44,780
29.	Pink Berry:	42,553
30.	Hooters:	38,394
31.	Applebee's:	35,071
32.	Baskin Robins:	34,823
33.	Caribou Coffee:	33,759
34.	Alamo Drafthouse:	32,089
35.	Blenz Coffee:	31,878
36.	Cracker Barrel:	31,264
37.	Sonic Drive-in:	29,958
38.	CRAVE Restaurant:	28,286
39.	Carl's Jr.:	28,249
40.	Famous Daves Bar-B-Que of America:	28,061
41.	Auntie Anne's:	27,564
42.	Genghis Grill:	26,979
43.	Outback Steakhouse:	26,796
44.	Jamba Juice:	26,224
45.	Camille's Sidewalk Cafe:	24,487
46.	Red Robin Gourmet Burgers:	24,341
47.	FreshBerry Frozen Yogurt Cafe:	24,107
48.	MOOYAH Burgers, Fries & Shakes:	21,492
49.	Cinnabon:	21,245
50.	Jack In The Box:	21,133

54.5 Market Resources

DigitalCoCo, 330 SW 2nd Street, Suite 103, Ft. Lauderdale, FL 33301. (954) 416-3028. (www.digitalcoco.com)

PART VII: DINING TRENDS & ANALYSES

55

BURGERS & SANDWICHES

55.1 Overview

According to The NPD Group (www.npd.com), Americans purchase more than 22 million sandwiches, burgers, and wraps each year. Sales of these items increased through the economic downturn.

According to *Sandwich Consumer Trend Report*, published by Technomic (www.technomic.com), 96% of consumers purchase sandwiches at least once a week; 59% say they eat at least three sandwiches a week.

55.2 Hamburgers

According to *Market Intelligence Report: Better Burgers*, a 2012 report by Technomic, the limited-service burger segment is the largest menu segment by revenue in the restaurant industry. McDonald's accounts for half of the segment's business.

A growing number of upscale fast-casual burger players, dubbed "better burger" concepts, have penetrated the marketplace. Growing burger chains like BurgerFi, Shake Shack, and Umami Burger, for example, offer expanded choices through premium cuts of meat along with specialized toppings, sauces, and other add-ons.

"Better-burger concepts have a lot going for them. First, they have the benefit of a basic and beloved menu focus. Raising the quality of the protein, bun, toppings and sides has been a winning formula. And a number of celebrity chefs have opened concepts that focus on burgers made with premium ingredients, helping to raise their profile."

Darren Tristano, Executive V.P.
Technomic, 8/1/12

Hamburger sales in the quick-service restaurant segment yield more than $65 billion annually, according to Technomic, with Americans consuming over 30.5 burgers per capita at restaurants.

According to The NPD Group, more than nine billion hamburgers are sold at U.S. restaurants each year, accounting for about 15% of all restaurant orders. Forty-two percent (42%) of all sandwiches sold are burgers. Distribution among types of burgers is as follows:

- Large cheeseburger: 42%
- Regular cheeseburger: 20%
- Bacon cheeseburger: 15%
- Regular hamburger: 12%
- Large hamburger: 11%

According to Datassential (www.datassential.com), 44% of all restaurants – from quick-service to fine-dining, have some type of burger on their menu. Driven by the increasing popularity of upscale burgers, casual- and fine-dining restaurants across the U.S. have rolled out artisan burgers and unique pairings. Of all restaurants that offer burgers, 32% are menued with cheddar, 30% with Swiss, and 25% with American cheese.

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.

Tom Ryan, founder and chief concept officer of Smashburger, foresees fast-casual concepts garnering 20% to 30% of the burger market within a few years, with three or four chains emerging as the leaders in the segment. Because of the dominance of the Big Three, fast-casual chains now garner only 2.6% of burger sales.

In March 2011, Hardee's and Carl's Jr., subsidiaries of CKE Restaurants and with more than 3,000 locations in 42 states, become the first national fast-food chains to add turkey burgers to their permanent menu. The 500-calorie burger was rolled out with a marketing tie-in with *Men's Health* magazine.

55.3 Hot Dogs & Sausages

According to data provided by the National Hot Dog & Sausage Council (www.hot-dog.org), more than 700 million packages of hot dogs were sold at retail stores in 2012, not including Wal-Mart, which does not report sales data. That number represents more than $1.7 billion in retail sales.

Consumers spend more than $4 billion purchasing 1.5 billion pounds of hot dogs each year, according to the council.

During summer – Memorial Day to Labor Day – Americans consume seven billion hot dogs. On Independence Day alone, Americans consumed an estimated 150 million hot dogs in 2012.

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 21.2 million hot dogs were consumed in major league stadiums during the 2011 season. More than 2.0 million hot dogs were sold at Shea Stadium, home of the New York Mets – the highest number among the 30 major league ball parks.

The following are the top hot dog consuming cities/region (source: National Hot Dog & Sausage Council):

1. Los Angeles, CA
2. Corpus Christi and San Antonio, TX
3. New York, NY
4. Washington, DC and Baltimore, MD
5. Chicago, IL
6. Dallas, TX
7. Houston, TX
8. Philadelphia, PA
9. South Carolina (statewide)
10. Harrisburg and Scranton, PA

Walt Disney World (Orlando, FL) sold six million hot dogs in 2012.

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.

55.4 Other Sandwiches

Other popular sandwich types include chicken and veggie sandwiches, along with wraps, tacos, tortillas, burritos, and crepes.

According to The NPD Group, consumers eat about four billion chicken sandwich servings at restaurants annually, or approximately 18% of all sandwiches sold.

The number of barbeque sandwiches purchased at restaurants increased 15% in 2011, according to The NPD Group. This was the highest increase among all types of sandwiches. Approximately 250 million barbeque sandwiches are served each year.

According to Technomic, 57% of adults say they eat at least one deli sandwich every two months; 47% eat a sub sandwich in the same period.

55.5 Market Resources

National Hot Dog and Sausage Council, 1150 Connecticut Ave NW, 12th Floor, Washington, DC 20036. (202) 587-4200. (www.hot-dog.org).

56

CELEBRITY CHEFS

56.1 Cooking Shows On Television

One Harris Poll (www.harrisinteractive.com) found that 50% of adults watch TV shows about cooking occasionally or very often. By demographic, those who do so are as follows:

Gender

- Female: 54%
- Male: 46%

Age

- 18-to-33: 43%
- 34-to-45: 51%
- 46-to-64: 55%
- 65 and older: 49%

> **"In the Food Network era, the phenomenon of the celebrity chef has utterly transformed the restaurant industry and, in the process, changed the very nature of how we eat."**
>
> *Time*

Exposure from television cooking shows has propelled some noted chefs to celebrity status.

56.2 Top-Earning Chefs

According to *Forbes* (July 2012), the top-earning chefs are as follows:

- Gordon Ramsay: $38 million
- Rachael Ray: $25 million
- Wolfgang Puck: $20 million

- Paula Deen: $17 million
- Mario Batali: $13 million
- Alain Ducasse: $12 million
- Todd English: $11 million
- Nobu Matsuhisa: $10 million
- Bobby Flay: $ 9 million
- Guy Fieri: $ 8 million

56.3 Chef Business Ventures

HFN (May 2012) rates the following as the top celebrity chefs and food personalities:

Bobby Flay
- Food Network's *Grill It!* and *Iron Chef America*
- Exclusive line of dinnerware, cutlery, and kitchen gadgets at Kohl's

Cat Cora
- Bravo's *Around The World In 80 Plates*; Food Network's *Iron Chef*
- Starfrit cookware sold by HSN, specialty shops, and online retailers

Curtis Stone
- TLC's *Take Home Chef*, Bravo's *Top Chef Masters*
- Kitchen Solutions cookware at Dillards, HSN, and Williams-Sonoma

Emeril Lagasse
- Host of shows on the Food Network, Cooking Channel, and Hallmark Channel
- Gorham dinnerware; T-Fal cookware and small electronics

Guy Fieri
- Food Network's *Diners, Drive-Ins and Dives* and *Tailgate Warriors*
- Lifeline brand cookware; Ergo Chef cutlery; Fox Run barbecue tools; restaurants

Marcela Valladolio
- Food Network's *Mexican Made Easy*
- Dinnerware, glassware, and accessories at Target

Martha Stewart
- Founder of Martha Stewart Living Omnimedia, which encompasses publishing, broadcasting, merchandising, and e-commerce
- Exclusive line of cookware, dinnerware, and kitchen gadgets at Macy's

Mario Batali
- ABC's *The Chew*, Food Network's *Iron Chef America*

- Cookware and kitchen tools at Crate and Barrel, Lenox.com, and Macy's

Paula Deen
- Food Network's *Paula's Home Cooking*; *Cooking With Paula Deen* magazine
- Cookware at Bed Bath & Beyond, Bon-Ton, JCPenney, and Target

Rachel Ray
- Food Network's *30-Minute Meals* and *Every Day With Rachel Ray*
- Cookware and culinary at Bed Bath & Beyond, cooking.com, Kohl's and Target

Sandra Lee
- Food Network's *Sandra's Money-Saving Meals* and *Semi-Homemade Cooking*
- Exclusive line of cookware, dinnerware, and kitchen gadgets at Kmart and Sears

Wolfgang Puck
- Cookware sold at Bed Bath & Beyond, HSN, and other retailers
- Guest judge on *Top Chef*, *Hell's Kitchen*, *The Next Food Network Star*

"When celebrity chefs license their name to a housewares product, they are inspiring people and connecting to them on a level that cannot be done with pure product alone. It's the classic 'purchase through story-telling.' When Wolfgang Puck, Emeril Lagasse, or Martha Stewart show me a product and explain why it's important to them, the product comes to life. In today's society, consumers are hard-pressed to find a romanticized story behind a product. Celebrities are the hook, the story and the compelling ingredient that connects a consumer to a product."

Kathryn Kerrigan
Retail Marketing Consultant
HFN, 5/12

The following are some other examples of hospitality and business ventures of these and other renowned chefs:

- In addition to co-ownership of restaurants in New York, Las Vegas, Los Angeles, and Singapore, chef Mario Batali has authored four cookbooks and is a spokesperson for Crocs footwear.
- Anthony Bourdain, formerly executive chef at Brasserie Les Halles in New York City, has authored several books, including best-selling *Kitchen Confidential: Adventures in the Culinary Underbelly*, and hosts *Parts Unknown* on CNN.
- David Chang, chef-owner of Momofuku Noodle Bar and several other restaurants in New York City, has co-authored a best-selling cookbook and has served as a guest judge on *Top Chef: All Stars*.
- Nobu Matsuhisa, famed sushi chef and business partners with Robert De Niro, has expanded beyond his celebrated restaurant concepts to include a boutique hotel with high-end sushi room service to his portfolio.
- Gordon Ramsay, owner of 24 restaurants around the world, hosts the wildly popular *Hell's Kitchen* as well as *Master Chef*.
- Ming Tsai, chef-owner of Blue Ginger, has authored four cookbooks, stars on *Simply Ming*, which is in its eighth season on public television, and has licensed Blue Ginger Multi-Grain Brown Rice Chips to Kellogg's.

56.4 Chef-Inspired Restaurant Concepts

A few chefs have used their celebrity to develop restaurant concepts across the country. Wolfgang Puck, credited with starting the concept of chef-branding, now operates 27 restaurants. Alain Ducasse and Nobu Matsuhisa each operate over 20 restaurants. Teaming up with Starwood Hotels and Resorts, Jean Georges Vongerichten plans to open 50 restaurants by 2014.

The following are the largest chef-branded operations (U.S. operations only):

Alain Ducasse (www.alain-ducasse.com)

- Brands: Adour at The St. Regis Washington, DC, Benoit New York, Mix in Las Vegas

Emeril's Homebase (www.emerils.com)

- Brands: Burgers and More by Emeril, Delmonico Steakhouse, e2 emeril's eatery, e2Go, Emeril's Chophouse, Emeril's Delmonico, Emeril's Italian Table, Emeril's New Orleans, Emeril's New Orleans Fish House, Emeril's Orlando, Emeril's Tchoup Shop, Lagasse's Stadium, NOLA Restaurant, Table 10

Jean-Georges Management (www.jean-georges.com)

- Brands: ABC Kitchen, J&G Grill, J&G Steakhouse, Jean-Georges, Jean-Georges Steakhouse, JoJo, Kauai Grill, Market, Nougatine at Jean-Georges, Perry St, Prime

Steakhouse, Pump Room, Simply Chicken, Spice Market, The Mark, The Mercer Kitchen

Mario Batali Restaurants (www.mariobatali.com)

- Brands: B & B Ristorante, Babbo Ristorante e Enoteca, Bar Jamon, Carnevino Italian Steakhouse, Casa Mono, Carnevino Italian Steakhouse, Del Posto, Eataly NYC, Esca, Lupa, Manzo, Mozza2Go, Osteria Mozza, OTTO Enoteca Pizzeria, Pizzeria Mozza, Tarry Lodge, Tarry Market

Nobu Matsuhisa (www.noburestaurants.com)

- Matsuhisa Aspen, Matsuhisa Beverly Hills, Matsuhisa Vail, Nobu Dallas, Nobu Fifty Seven, Nobu Honolulu, Nobu Las Vegas, Nobu Los Angeles, Nobu Malibu, Nobu Miami Beach, Nobu New York, Nobu Next Door, Nobu San Diego

Todd English Enterprises (www.toddenglish.com)

- Brands: Bluezoo, Bonfire, Ça Va Brasserie, English Tap & Beer Gardens, Figs, Isabelle's CurlyCakes, Olives, Todd English Food Hall, Todd English P.U.B., Todd English Restaurant, Tuscany

Wolfgang Puck Fine Dining Group (www.wolfgangpuck.com)

- Brands: Chinois, CUT, Five Sixty, Postrio, PUCK'S, red I seven, Spago, The Source by Wolfgang Puck, Trattoria del Lupo, Wolfgang Puck American Grille, Wolfgang Puck Bar & Grill, Wolfgang Puck Bistro, Wolfgang Puck Cafe, Wolfgang Puck Cucina, Wolfgang Puck Express, Wolfgang Puck Grille, Wolfgang Puck Steak, WP24

57

CHILDREN'S MEALS

57.1 The Kids LiveWell Initiative

The National Restaurant Association (www.restaurant.org) launched the Kids LiveWell initiative in 2011. Nineteen restaurant chains participated in the program's first years, as follows: Au Bon Pain, Bonefish Grill, Burger King, Burgerville, Carrabba's Italian Grill, Chevys, Chili's, Corner Bakery Café, Cracker Barrel, Denny's, El Pollo Loco, Friendly's, IHOP, Joe's Crab Shack, Outback Steakhouse, Silver Diner, Sizzler, T-Bones Great American Eatery, and zpizza.

At the end of its first year, in July 2012, the Kids LiveWell program boasted more than 100 participating brands – both chains and independent operators – with more than 25,000 locations throughout the U.S.

Participating restaurants commit to offering and promoting a variety of menu selections that meet criteria based on leading health organizations' scientific dietary recommendations, including the USDA Dietary Guidelines. Restaurants must offer a full kids' meal, including entrèe, side, and beverage, totaling 600 calories or less. Meals must contain two or more servings of fruit, vegetables, whole grains, lean protein, and/or low-fat dairy, while restricting unhealthful fats, sugar, and sodium. Also, participating restaurants must provide and promote nutritional information.

57.2 Healthful Kids' Menus At QSRs

According to the National Restaurant Association, healthful options in kids' meals was the No. 3 trend in the quick-service restaurant (QSR) segment in 2012 and 2013. In 2011 it was the No. 1 trend. Though the interest in healthful meal options for children's fare has reportedly waned, numerous efforts continue to improve the nutritional value of children's meals.

McDonald's launched the Happy Meal Choice program in 2004. More recently, McDonald's added to its kids' menu a grilled Snack Wrap option that comes with a Fruit n' Yogurt Parfait with granola and a 16.9-ounce bottle of water. The Happy Meal was revised in 2011 to include apple slices and fewer fries.

Subway's Fresh Fit® meals for kids include a low-fat sandwich, such sides as sliced apples and raisins, low-fat milk, yogurt, and juice options, and toy premiums promoting physical activities.

Burger King introduced Crown Meals for kids in 2011. There are breakfast, hamburger, and chicken tender options, each accompanied by apple juice or fat-free milk and fresh apple slices.

Several fast-casual operators, including Tony Roma's, Olive Garden, and Uno's Pizzeria also have revamped their menus.

The NPD Group (www.npd.com) found servings of kids' meals with toys were down 6% in 2011, from about 1.3 billion servings to 1.2 billion servings.

> **"Kids' meals are losing appeal with both kids and parents. Dollar menus have given price-conscious parents a powerful incentive to choose an à la carte burger or fries rather than paying for a kids' meal. In addition, the toys that come in today's kids' meals aren't capturing kids' attention, and children are simply aging out of the meals earlier as they're becoming more technologically savvy."**
>
> Bonnie Riggs, Analyst
> The NPD Group
> *Nation Restaurant News*, 5/28/12

Though lures like toys may no longer help to boost sales of kids' meals, The NDP Group still sees the renewed focus on menu offerings aimed at children continuing.

57.3 School Meals

In 2011, the U.S. Department of Agriculture published the revised dietary standards aimed at the approximately 32 million children who eat breakfasts and lunches served at schools. The guidelines are aimed at making meals more nutritious, including increasing the amounts of whole grains, fruits, and vegetables and limiting the amount of sodium, saturated fat, trans fat, and calories per meal.

The School Nutrition Association (www.schoolnutrition.org), a national, non-profit professional organization representing 55,000 school nutrition professionals across the country, provides the following assessment for cafeteria service at K-12 schools in their *2012 Back to School Trends Report*:

- Cafeterias are serving fruits and vegetables in a variety of ways to appeal to students' diverse preferences. In addition to produce offered in the traditional serving line, over 55% of responding school districts have self-serve salad or produce bars.

- More schools are providing convenient grab-and-go options. Nearly 64% of respondents offer pre-packaged salads, 87% offer whole fruit, and 67% offer packaged produce, like bags of baby carrots, grapes, and sliced apples that students can eat on the run or toss in their backpacks for later. Many districts are purchasing produce from local farmers – over 60% of respondents say they will purchase locally-grown or locally-raised items in the coming school year.
- All respondents are serving whole-grain rich items in their school cafeterias, with nearly every district offering whole-grain breads/rolls/buns. Over 80% of districts are offering whole-grain pastas, rice, and cereals, and 78% report serving whole-grain tortillas, pitas, or flatbreads.
- Schools have also taken steps to make kid favorites into healthy choices. In 42% of responding school districts, pizza is the most popular lunch entrèe served, but over 92% of districts are serving pizza with a whole-grain rich crust. Districts also report serving student favorites that are low-sodium, low-fat, and reduced sugar.
- Virtually all respondents (94%) use some method to encourage students to try these new menu items, with over 87% employing student taste testing/sampling methods. Districts get students involved in the menu selection process by allowing them to taste test and provide feedback on potential new foods or recipes. Through taste tests, cafeterias gain valuable insight which helps them identify healthy choices that students are interested to eat. And when introducing new menu items, many cafeterias offer students free samples, giving students the chance to taste an unfamiliar food before they commit to selecting that item as part of their meal.

57.4 Market Resources

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

58

CUISINE

58.1 Regional Cuisine

Virtually every city and state in America has a dish that is its culinary signature.

The following are some cuisines and dishes for which states are noted (sources: *USA Today*, *Go*, and various local media sources):

- Alabama: Vegetable plate
- Alaska: King salmon
- Arizona: Chimichanga
- Arkansas: Catfish
- California: Fresh, seasonal organic vegetables
- Colorado: Lamb chops
- Connecticut: Whole clam bellies
- Delaware: French fries sprinkled with salt and malt vinegar
- Florida: Key lime pie, fresh seafood at local fish shacks, Floribbean cuisine
- Georgia: Peach cobbler
- Hawaii: Grilled mahi-mahi
- Idaho: Baked russet potato
- Illinois: Corn dogs
- Indiana: Perch
- Iowa: Grilled pork chops
- Kansas: Fried chicken
- Kentucky: Corn pudding
- Louisiana: Crawfish
- Maine: Lobster roll
- Maryland: Steamed blue crabs
- Massachusetts: New England clam chowder
- Michigan: Cherry pies
- Minnesota: Walleye
- Mississippi: Pecan pie
- Missouri: Prime rib
- Montana: Rainbow trout
- Nebraska: Strip steak
- Nevada: All-you-can-eat buffets, celebrity-chef steakhouses
- New Hampshire: New England boiled dinner
- New Jersey: Diner fare
- New Mexico: Enchiladas

- New York: Reuben sandwich
- North Carolina: Grilled quail
- North Dakota: Cinnamon rolls
- Ohio: German chocolate cake
- Oklahoma: Chicken-fried steak
- Oregon: Marionberry cobbler
- Pennsylvania: Shoo-fly pie
- Rhode Island: Jonnycakes
- South Carolina: Shrimp and grits
- South Dakota: Buffalo rib-eye steak
- Tennessee: Buttermilk biscuits
- Texas: Chili con carne; Tex-Mex cuisine
- Utah: Brownie chocolate sundae
- Vermont: Pancakes and maple syrup
- Virginia: Country hams
- Washington: Olympia oysters
- West Virginia: Ramps (wild onions)
- Wisconsin: Grilled bratwurst slathered with brown mustard
- Wyoming: Western breakfast

The following are some local specialities (sources: *Forbes, Sky Magazine*, *USA Today*, and various local media sources):

- Albuquerque, New Mexico: Blue corn enchiladas
- Atlanta, Georgia: Pot likker
- Boston, Massachusetts: Indian pudding, baked beans, surf & turf tacos, scrod
- Buffalo, New York: Buffalo wings
- Charleston, South Carolina: Creamy grits
- Chicago, Illinois: Italian beef, hot dogs, deep dish pizza
- Cincinnati, Ohio: Double-decker sandwich; Cincinnati chili
- Dallas, Texas: Barbeque brisket
- Kansas City, Missouri: Fried chicken dinner, barbecue
- Los Angeles, California: Fish tacos
- Louisville, Kentucky: Hot Brown
- Memphis, Tennessee: Pork sandwich
- Miami, Florida: Stone Crabs, Key Lime pie, Cuban sandwiches
- Milwaukee, Wisconsin: Frozen custard
- Mobile, Alabama: West Indies salad
- Nashville, Tennessee: Ham and red-eye gravy
- New Orleans, Louisiana: Oyster loaf, jambalaya, gumbo, crawfish
- New York, New York: Pastrami sandwich, pizza, bagels
- Philadelphia, Pennsylvania: Cheese steak sandwich
- Portland, Oregon: Oyster stew
- San Diego, California: Fish tacos
- San Francisco, California: Sourdough bread

- Seattle, Washington: Salmon
- Tampa, Florida: Cubano (Cuban sandwich)
- Tucson, Arizona: Chimichanga

According to *Nation's Restaurant News*, the following are popular regional flavor profiles:

Midwest

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

Northwest

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

South

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

West

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

58.2 Ethnic Cuisine

According to Mintel International Group (www.mintel.com), ethnic foods garner $75 billion annually in the U.S. Italian, Mexican, Chinese, Pan-Asian, and Japanese cuisine were found by Mintel to be the most popular ethnic foods, with 66.6% of respondents to a Mintel survey saying authenticity was their top expectation when it comes to ethnic foods.

A recent survey of consumers by Harris Interactive (www.harrisinteractive.com) asked participants their favorite types of ethnic food. Responses were as follows:

- Italian: 28%
- Mexican: 24%
- Chinese: 22%
- Japanese: 7%
- Thai: 5%
- Indian: 3%
- Cajun: 2%
- Other: 8%

According to The NPD Group (www.npd.com), the following are the 10 fastest-growing ethnic cuisines listed on restaurant menus:

- Cuban
- Asian
- Shanghai
- Tuscan
- Mandarin
- Mediterranean
- Hong Kong
- Thai
- Japanese
- Italian

59

CUSTOMER SERVICE

59.1 Ranking Customer Priorities

The 2012 National Household Survey, conducted by the National Restaurant Association (www.restaurant.org), asked adults the attributes most important when they are choosing a full-service restaurant. Responses were as follows:

- Good service: 97%
- Enjoyable atmosphere: 93%
- Good value: 93%
- Favorite items on the menu: 90%
- Healthy menu items: 76%
- Family- or child-friendly: 68%
- Locally souorced food: 64%
- Takeout or delivery options: 49%
- Food they haven't tried before: 48%
- Organic or environmentally friendly food: 43%

"Good service still tops the list of restaurant attributes."

2013 Restaurant Industry Forecast
National Restaurant Association, 1/13

59.2 Customer Service Strategies

Jim Sullivan, CEO of Sullivision (www.sullivision.com), suggests the following as drivers of customer satisfaction at restaurants:

- Focus on ROG (return of guest), not ROI. Repeat business is the linchpin of profitability in any successful foodservice operation.
- Make your customers happier by hiring and developing great people. Compete first for talent, then customers.

- When customer service problems recur, look first at the system before you blame your people.
- Make certain that owners and managers set the right example. Companies do what the boss does. When managers walk past a problem, they've approved it.
- Sync hiring, training, and marketing to support and exceed guest expectations. Servers must sell all that the kitchen can make and the kitchen must make all that the servers can sell.
- Service goals should be budgeted every year along with sales goals.
- Have a one-minute post-shift debrief meeting with every team member.

"In my opinion service is the key deliverable that distinguishes foodservice from retail operations. If you buy a laptop at an electronics store, you still have a laptop when you get home, no matter how you were treated by the employees. But when you go to a restaurant – other than leftovers – what do you have when you get home? Memories."

Jim Sullivan, CEO
Sullivision
Nation's Restaurant News, 2/11/13

59.3 Team Service

Cross-training servers and pairing them up with co-workers has been shown to result in more effective coverage of tables.

“While the restaurant industry has long advocated the practice of having one server interact exclusively with designated customers, a growing number of casual-dining brands are turning to a team-service model in an effort to boost profitability and heighten the guest experience.”

Nation’s Restaurant News, 10/1/12

National chains like Chili’s Grill & Bar, Red Lobster, and Hooters are shifting away from the one-server, one-table standard and asking front-of-the-house staffers to work together as a other team.

“When we first rolled [team service] out we saw a difference of one [percentage] point on the labor line in the P&L, and that was worth $25 million.”

Kelli Valade, Chief Operating Officer
Chili’s Grill & Bar
Nation’s Restaurant News, 10/1/12

59.4 Top Restaurants For Service

Winners of Open Table’s 2012 Diners’ Choice Award for Best Service are presented in Section 94.3 of this handbook.

Zagat (www.zagat.com), a restaurant guidebook and online publisher, released its 2013 list of the best restaurants for service in February 2013. The list is presented in Section 113.4 of this handbook.

60

DAYPARTS

60.1 Daypart Spending and Traffic

According to *Consumer Spending Survey*, by the Bureau of Labor Statistics (www.bls.gov), consumer spending in restaurants by daypart is distributed as follows:

- Dinner: 46%
- Lunch: 30%
- Dining while traveling: 10%
- Breakfast: 9%
- Snacks: 5%

Distribution of total restaurant traffic, including takeout and delivery, is as follows (sources: The NPD Group [www.npd.com] and *Nation's Restaurant News*):

- Morning meal: 20%
- Lunch: 33%
- Dinner: 31%
- P.M. snacks: 16%

Assessments of restaurant dining recognize that few people eat the traditional three meals each day. Consumers increasingly eat one or two formal meals and snack throughout the day. This trend is discussed in Chapter 75.

"The idea of a normal day being breakfast, lunch, and dinner is a myth."

Ron Paul, President
Technomic
USA Today, 11/22/11

60.2 Breakfast

Twelve percent (12%) of restaurant industry sales come from the breakfast daypart, with $42 billion generated annually, according to *Breakfast Consumer Trend Report*, published by Technomic (www.technomic.com). Forty-six percent (46%) of adults regularly or occasionally purchase weekday breakfasts at restaurants.

The lower cost of breakfast compared with other daypart meals and the pervasive belief that starting the day with a meal contributes to a healthful lifestyle are the key factors driving increased morning meal traffic. In response, chains – from QSRs to full-service restaurants – are adding or expanding breakfast menus.

Among those who do eat a morning meal, three-fourths have their morning meals, snacks, and beverages in their home. Approximately one in five consume foods and beverages in the morning both at-home and away-from-home on a typical day, and 14% have their morning meals away from home.

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

- Younger than 18: 12%
- 18-to-24: 9%
- 25-to-34: 18%
- 35-to-49: 28%
- 50-to-64: 22%
- 65 and older: 11%

According to Technomic and *Nation's Restaurant News*, the top breakfast entrèes are as follows:

- Breakfast platter
- Pancakes
- French toast
- Vegetable omelet
- Scrambled eggs
- Egg/egg-and-cheese sandwich
- Bacon, egg-and-cheese sandwich
- Belgian waffle/waffle
- Steak-and-eggs
- Eggs benedict
- Burrito/Chimichunga
- Doughnut
- Skillets
- Ham, egg-and-cheese sandwich
- Sausage, egg-and-cheese sandwich

The following are the primary reasons adults select a restaurant for breakfast (sources: Mintel and *Nation's Restaurant News*):

Weekdays

1. Low price
2. Quality of breakfast items
3. Menu variety
4. Convenience of location
5. Speed of service

Weekends

1. Quality of breakfast items
2. Menu variety
3. Low price
4. Convenience of location
5. Relaxing atmosphere

The following are growing trends in the breakfast daypart (source: Technomic):

- Convenience stores are improving coffee service along with rolling out more breakfast choices for a.m. patrons. Several Chevron ExtraMile locations, for example, are adding Seattle's Best drive-thrus, and several WaWa stores in the northeast are offering scrambled egg bowls, breakfast burritos, pancakes, sausage, and more.
- Full-service restaurants are including pared-down breakfast for those morning patrons who prefer on-the-go meals. IHOP, Denny's, and Friendly's restaurants have recently launched express concepts.
- Patrons are increasingly requesting more healthful menu items during breakfast. One-third of consumers who eat breakfast at limited-service concepts stated this preference. Yogurt, smoothies, oatmeal, and whole grains along with low-cal and low-fat ingredients are showing up on more breakfast menus.
- With the customization and portability of smoothies, along with the perceived healthfulness, sales of smoothies are increasing during the morning daypart. For some, a smoothie with added supplements and vitamins are a nutritional alternative to coffee.
- Ethnic flavors are showing up on more breakfast menus, particularly among Hispanic customers. The breakfast burrito has become one of the top 10 most-menued item and now appears on one-quarter of breakfast menus.

60.3 Lunch

When adults were asked in a survey where they usually had lunch, responses were as follows (source: *USA Today*):

- Home: 48%
- Desk at work: 32%

- Restaurant: 6%
- Car: 5%
- Other: 9%

According to The NPD Group, lunch traffic at restaurants has been on the decline for several years. The decline is attributed, in large part, to workers having less time for lunch during the workday; 81% of workers say they have less time for lunch because of their work schedule or recent increases in their workload. Visits during traditional lunchtime hours decreased 1% for the 12-month period ending March 2012.

By restaurant category, lunch traffic at restaurants is distributed as follows (source: The NPD Group):

- Hamburger: 28%
- Other sandwich: 10%
- QSR pizza: 7%
- QSR Mexican: 5%
- Mid-scale varied menu: 4%
- QSR varied menu: 4%
- Casual-dining bar and grill: 3%
- Chicken: 3%
- Convenience stores: 3%
- Deli: 3%
- QSR Asian: 3%
- Casual-dining varied menu: 2%
- Family style: 2%
- Bakery sandwich: 1%
- Casual-dining Mexican: 1%
- Gourmet coffee/tea: 1%
- Grill/buffet: 1%
- Mid-scale Asian: 1%
- All other: 17%

Tacos, deli sandwiches, and combo meals have gained in popularity during lunchtime. And like the restaurant industry as a whole, more consumers are requesting more healthful fare for their midday meals, with meals with lower calories being the most sought after goal for lunch.

60.4 Dinner

According to *Dinner and Late-Night Consumer Trend Report*, published in January 2012 by Technomic, 40% of consumers cut back on away-from-home dinner purchases in 2011 compared with two years prior, largely because they had less money to spend on dining out. When weighing dine-out options, consumers in 2011 were more likely to choose restaurants based on the availability of frequent diner programs (31% vs. 23%) and happy hour deals (24% vs. 21%) than in 2009.

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.

> **"The daypart with the highest average check also is performing the most poorly these days. Getting customers to come out for a meal after dark continues to prove challenging during these lean times, which are forcing more Americans to eat dinner at home."**
>
> *Nation's Restaurant News*, 5/16/11

According to The NPD Group, the average U.S. consumer purchases 64 dinner or supper meals from restaurants each year, a decline from 67 in 2005. The loss of dinner traffic is coming directly from an increase in dinner meals prepared and consumed at home.

The distribution of restaurant traffic for the dinner daypart, by customer age, and change from 2001, is as follows (source: The NPD Group):

	Supper Meal Occasions	Share of Traffic	Change From 2001
• 18-to-31:	66	28%	-13%
• 32-to-43:	63	19%	- 7%
• 44-to-51:	60	20%	- 7%
• 52-to-61:	56	16%	- 7%
• 62 and older:	49	17%	1%

Demographic trends do not bode well for growth in dinner traffic at restaurants. According to *Changing Demographics: Get to Know the New Face of Your Market*, a 2011 report by The NPD Group, younger generations would be more likely to go out for breakfast than to sit down at a restaurant at dinnertime. Also, the fast-growing Hispanic demographic is less likely than most segments of the population to go out for dinner.

The following are the primary reasons that adults select a restaurant for dinner (sources: Mintel and *Nation's Restaurant News*):

- Want to order something great: 59%
- Want to satisfy my hunger: 35%
- Want to treat myself to a big meal: 25%
- Want to eat a healthful meal: 23%
- Cheap items on the menu: 9%
- Want a meal that won't fill me up too much: 9%
- None of the above: 7%

61

DINING & THE INTERNET

61.1 Consumer Use Of The Internet For Dining Activities

According to *2013 Restaurant Industry Forecast*, by the National Restaurant Association (www.restaurant.org), the following percentages of adults have used the Internet for various dining-related activities:

- Visit restaurant website: 59%
- View restaurant menu: 58%
- Information about a restaurant: 54%
- Place dine-in, carry-out or delivery order: 32%
- Make reservations: 27%

The following percentages of adults say they are likely to use these various sources to choose a restaurant:

- Internet search engine: 45%
- Promotion received by e-mail: 37%
- Online dining guide: 36%
- Consumer-driven review websites and online communities: 25%

According to *National Household Survey, 2012*, by the National Restaurant Association, the following is the proportion of adults who have used the Internet for select restaurant-related activities:

	All Adults	18-34	35-44	45-54	55-64	65 or Older
• Visit a restaurant's website:	60%	76%	73%	57%	51%	29%
• View a restaurant's menu:	59%	75%	71%	55%	50%	29%
• Find out information about a restaurant they haven't been to before:	57%	74%	65%	56%	46%	29%
• Place an order for carry-out or delivery:	42%	63%	51%	34%	27%	20%
• Search for nutritional info about restaurant food:	34%	45%	45%	28%	27%	15%
• Use a smartphone app to find a restaurant, place order or make a reservation:	34%	55%	44%	23%	20%	11%
• Make reservations:	33%	44%	38%	28%	25%	20%

• Post or read reviews about restaurants on consumer-driven site such as Yelp:	27%	40%	37%	25%	15%	9%
• View restaurant fan sites and pages on Facebook, Pinterest or YouTube:	23%	32%	33%	17%	17%	7%
• Purchase merchandise from a restaurant's website:	14%	22%	16%	10%	8%	7%
• Follow restaurant on Twitter:	5%	7%	7%	2%	4%	3%

	Frequent Full-service	**Frequent Quick-service**	**Frequent Off-Premises Dinner**
• Visit a restaurant's website:	66%	65%	70%
• View a restaurant's menu:	65%	64%	67%
• Find out information about a restaurant they haven't been to before:	64%	65%	66%
• Place an order for carry-out or delivery:	50%	50%	54%
• Search for nutritional info about restaurant food:	40%	39%	34%
• Use a smartphone app to find a restaurant, place order or make a reservation:	50%	45%	48%
• Make reservations:	40%	33%	39%
• Post or read reviews about restaurants on consumer-driven site such as Yelp:	40%	33%	36%
• View restaurant fan sites and pages on Facebook, Pinterest or YouTube:	26%	32%	30%
• Purchase merchandise from a restaurant's website:	18%	20%	24%
• Follow restaurant on Twitter:	8%	6%	8%

By generation, the following are restaurant activities of U.S. Internet users (source: Technomic [www.technomic.com]):

	Millennials	**Generation X**	**Baby Boomers**
• Look at restaurant menus online via mobile phone/smartphone:	32%	17%	8%
• Follow restaurants via social media:	23%	15%	6%
• Check in at restaurant via an app:	19%	8%	4%

Among all age groups, this study found looking up menus to be the most popular restaurant-related activity.

Mobile Fast Food Marketing: How QSRs and Fast Casuals Are Getting Quicker and Faster, a 2012 report by eMarketer (www.emarketer.com), reported that fast-food and fast-casual patrons, the most frequent users of mobile Internet, are increasingly making their dining decisions on the move. Using store locators, menu finders, mobile coupons, and ordering apps, this cohort engages heavily with restaurants via the Internet.

Mobile Path-to-Purchase Restaurants, a report by xAd (www.xad.com) and Telmetrics (www.telmetrics.com), found the time frame from searching for restaurant information to purchase among smartphone and tablet users as follows:

	Smartphone	Tablet
• Immediately:	30%	15%
• Within hour:	34%	29%
• Within day:	25%	40%
• Within month:	7%	15%
• Wasn't looking to book anything:	3%	1%

The study also found 64% of mobile searchers purchase their meal within an hour of searching.

61.2 Restaurant Websites

According to the National Restaurant Association, the following percentages of restaurant operators have a website:

- Fine-dining: 97%
- Casual-dining: 82%
- Quick-service: 81%
- Family-dining: 76%

The percentages of restaurant websites with various features are as follows:

	Fine-Dining	Casual-Dining	Family-Dining	Quick-Service
• Menu:	99%	98%	95%	93%
• E-mail option:	91%	86%	76%	55%
• Promotions/daily specials:	61%	71%	59%	52%
• Reservations:	65%	32%	23%	n/a
• Merchandise:	22%	37%	29%	25%
• Job listings:	19%	25%	19%	54%
• Packaged food items:	11%	15%	23%	12%
• Takeout/delivery ordering:	13%	13%	18%	34%
• Menu nutritional information:	11%	7%	17%	65%

61.3 Online Reservations

There are several online reservations services operating throughout the United States. The largest among these is OpenTable.com, which provides reservation services for more than 20,000 restaurants across the U.S. Restaurants using this service pay a $1,200 installation fee and a fee of $200 monthly, plus a $1 fee for each reservation. Diners who make reservations do not pay a fee. As of year-end 2012, over 250 million diners had used OpenTable.com.

61.4 Online Reviews

According to the National Restaurant Association, 35% of U.S. adults have used online reviews to research a restaurant they had not yet visited.

The two top national sites for restaurant reviews are Citysearch.com and Yelp.com. According to *The New York Times*, both have about four million written reviews and 15 million visitors a month. Other popular review destinations include Chowhound.com, Dinesite.com, IgoUgo, Insider Pages, OpenTable, local.Yahoo.com, and Zagat.com.

The rising influence of online restaurant reviews has not diminished the popularity of traditional media reviews. *Zagat*, for example, sells 5.5 million of its print guides each year, according to *The New York Times*.

61.5 Social Networking

Despite the use of social networks by an increasing majority of people, relatively few use social media for dining-related activities, according to Nation's Restaurant News. When asked about their activities on Facebook and Twitter, responses were as follows:

	Yes	No
• Do you currently follow any restaurants on Facebook?	16%	84%
• Do you currently follow any restaurants on Twitter?	4%	96%

When asked by *Nation's Restaurant News* about their social networking activities, restaurant operators responded as follows:

	Yes	No
• Is your restaurant on Facebook?	25%	75%
• Is your restaurant currently on Twitter?	38%	62%

Surveys by the National Restaurant Association also found relatively low levels of use of the Internet for dining-related social networking. Activities are anticipated to increase by 2013, however. When asked about their future social media activities, restaurant operators responded about the tools they expect to use in the next two years, as follows:

	Fine-Dining	Casual-Dining	Family-Dining	Quick-Service
• Facebook:	84%	80%	74%	80%
• Online review sites (Yelp, etc.):	70%	62%	61%	56%
• Twitter:	63%	60%	51%	69%
• Restaurant blog:	62%	44%	45%	51%
• Phone apps like Urban Spoon:	54%	47%	37%	47%
• YouTube/other video sharing sites:	45%	40%	44%	50%
• Text messaging:	36%	46%	38%	64%
• Flickr/other photo-sharing sites:	42%	32%	39%	41%

"Digital marketing is a good way to drive first-time visits. It can be used to shape opinions about a brand, then drive repeat business. Social media generates trial."

Bonnie Riggs, Analyst
The NPD Group
Nation's Restaurant News, 2/20/12

61.6 Online Ordering

According to a survey by Prof. Sheryl E. Kimes at the School of Hotel Administration at Cornell University, 48% of adults have ordered meals online, either through websites, text messaging, or mobile apps. The percentages of those who have done so are as follows:

Gender

- Female: 52%
- Male: 45%

Age

- 18-to-24: 70%
- 25-to-34: 78%
- 35-to-49: 55%
- 50-to-64: 33%
- 65 and older: 21%

Locale

- Urban: 60%
- Suburban: 49%
- Small town: 36%
- Rural: 41%

Cornell University researchers found that 27% of restaurants offering takeout, delivery, or catered meals support online ordering. Among those offering the option, 89% said their systems provided incremental business increases, improved service, or both.

61.7 In-Restaurant Ordering Via Tablet

A few restaurants are letting dining-room customers place orders using a tablet computer. One example is California-based Stacked: Food Well Built, which has placed iPads on tables at each of its three locations. Diners use the tablet devices to look at meal options, order, and pay for meals. The devices rest inside metal frames that sit about 3-inches off the tabletops. Customers ordering burgers select the type of bun, meat, and toppings on the iPad by clicking and dragging icons. Pizzas and salads may also be ordered using the devices.

Restaurants located near Delta Air Lines gates at New York's John F. Kennedy and LaGuardia airports installed iPads at tables to allow guests to custom-order meals.

Bone's Restaurant (Atlanta) uses iPads to present its wine list; wine sales increased 20% during the first six months following introduction of the concept.

62

DINING WHILE TRAVELING

62.1 Traveler Dining

2012 Restaurant Trends Survey, by the National Restaurant Association (www.restaurant.org), reports that travelers and tourists represent an average of 29% of sales for fine-dining operators, approximately 25% of sales for family-dining and casual-dining operators, 19% of sales for quick-service operators, and 15% of sales for fast-casual operators.

According to a survey by Experian Simmons (www.smrb.com), 18% of adults say that they “try to eat gourmet food whenever they can;” 31% of these consumers “strongly” agree with the statement. Travel provides the opportunity for those who enjoy gourmet dining to experience new cuisine.

According to *Portrait of Affluent Travelers*, a report by Ypartnership (www.mmgyglobal.com), 85% of luxury travelers want dining in new and different restaurants as part of their travel experience. This ranked highest among all travel activities among the affluent, ahead of shopping, gambling, cultural activities, museums, and spas.

62.2 Culinary Destinations

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

- California
- Florida
- New York
- Texas
- North Carolina
- Georgia

The top destinations for wine-related travel are as follows:

- California
- New York
- Missouri
- North Carolina
- Oregon
- Pennsylvania

62.3 Sampling Tours

Combining culinary interests with walking tours, sampling tours have become an increasingly popular tourist activity in New Orleans, Seattle, and New York, among other cities.

In the city where Creole cuisine – proclaimed to be the country's only true regional cuisine – originated, New Orleans Culinary History Tours (www.noculinarytours.com) offers daily walking tours. Stops on the tour include several historic restaurants, including the two oldest in the city: Antoine's and Tujague's, established in 1840 and 1856, respectively.

The concept has also caught on in Seattle. Savor Seattle Tours (www.savorseattletours.com) offers walking tours that stop at select restaurants and farmers' booths for demonstrations, informative talks, and tastings at the famed Pike Place Market. Seattle Food Tours (www.seattlefoodtours.com) offers cultural and food tours of both Pike Place Market and the Belltown neighborhood.

In South Florida, Miami Culinary Tours (www.miamiculinarytours.com) offers the Cuba Bonita Tour, with visits to Little Havana and Key Biscayne for a variety of classic Cuban dishes and drinks.

In Baltimore, Charm City Food Tours (www.charmcityfoodtours.com) hosts culinary tours of four neighborhoods: Federal Hill, Fells Point, Little Italy/Jonestown, and Mount Vernon.

Walking tours focusing on New York City's diverse ethnic and local cuisine have become popular. The following are three of the more popular tours:

- Savory Sojourns (www.savorysojourns.com) hosts tours throughout Manhattan that include visits to the city's myriad specialty food shops and indoor markets. The group also takes visitors on ethnic food tours through such neighborhoods as Chinatown, Little Italy, and Atlantic Avenue, also known as 'Little Arabia.'
- New York Chocolate Tours (www.sweetwalks.com), hosted by Carmen Botez, editor of an online magazine, charges visitors $70 for a tasting tour of the city's high-end sweets shops.
- Foods of New York Tours (www.foodsofny.com) offers tours of shops and restaurants in Chelsea Market, Chinatown, and Greenwich Village. According to *The News & Observer*, annual ticket sales total more than 20,000 and are increasing at about 30% per year.

62.4 Culinary Arts Programs

Besides their curricula for students seeking careers in the field, several U.S. cooking schools have programs specially designed for tourists as well as locals wanting to sharpen their culinary skills. One such is Johnson & Wales University (www.jwu.edu), with its Chefs Choice® classes at its Providence, Rhode Island; North Miami, Florida; Denver, Colorado; and Charlotte, North Carolina, campuses.

Harrah's Resort in Atlantic City, New Jersey, offers visitors the opportunity to fine-tune cooking skills at The Viking Cooking School. Students prepare gourmet dishes during the classes, which are offered for 90 minutes or three hours.

The Creative Cooking School (www.creativecookingschool.com) in Las Vegas, Nevada, offers four-day classes that teach the techniques of sautéing, stir-frying, roasting, grilling, and pan-frying. Participants learn how to prepare romantic dinners, spruce-up recipe staples, and create dessert treats like chocolate decadence soufflé.

The Culinary Institute of America (www.ciachef.edu) offers two- to five-day sessions at its Hyde Park, New York, campus. The basic program covers stocks, sauces, and sautéing; the pastry course tackles delicacies from buttercreams to crème anglaise; and baking courses focus on recipes from sourdough starters to scones. At the school's campus in St. Helena, California, novices can take a variety of food and wine courses.

The following are other prominent cooking schools, all of which offer both chef demonstrations and hands-on classes:

- New Orleans Cooking Experience (New Orleans, LA; www.neworleanscookingexperience.com)
- Relish Culinary Adventure (Healdsburg, CA; www.relishculinary.com)
- The French Pastry School (Chicago, IL; www.frenchpastryschool.com)
- The Institute of Culinary Education (New York, NY; (www.iceculinary.com)
- Woodlands Resort & Inn (Summerville, SC; www.woodlandsinn.com)

Select cruise lines also offer culinary activities. Crystal Cruises, for example, started its guest chef program on world cruises in the early 1990s and has since expanded to more than a dozen itineraries. In addition to the sure-fire appeal of the cooking demonstrations and tastings by celebrated chefs, the line sees it as an educational tool for its own chefs. Adding a winemaker or sommelier boosts wine sales.

62.5 Winery Tours

Sonoma and Napa Valley, California, particularly the wineries, are primary tourist destinations, garnering five million visitors annually. Approximately an hour north of San Francisco, the heart of California's $35 billion wine industry offers many tour options. Along with the opportunity to learn about the art of winemaking, wineries in the region offer breathtaking views, outdoor music, and other attractions. The following is a sampling:

- A tour of Gloria Ferrer winery (www.gloriaferrer.com) takes visitors deep into the caves carved out of the hillside and educates them on the process of sparkling winemaking. Each summer the winery hosts its Catalan Festival – a two-day celebration honoring the owners' Spanish roots.

- Gundlach Bundschu (www.gunbun.com) has transformed the winery experience into much more. In the spring and summer the winery hosts a myriad of activities that include a Shakespeare festival, movies under the stars, and classical music concerts.
- Along with the tasting room for award-winning wines, the Rubicon Estate (www.rubiconestate.com) includes the Centennial Museum, with displays of movie memorabilia including Francis Ford Coppola's five Oscar statues.
- St. Supery Vineyards and Winery (www.stsupery.com) offers a one-day Harvest Adventure. Groups of up to 12 pick grapes, stomp them with their feet, and taste juices as they ferment. A blending seminar concludes the experience.
- Viansa Winery & Italian Marketplace (www.viansa.com) includes a 90-acre waterfowl preserve. In the summer months the winery hosts barbecues and live music.

Winery-themed tourism is not exclusive to California; all 50 states have at least one winery. Most wineries have gift shops and offer wine tasting for visitors. A few are destinations for business meetings and leisure tourists. Château Élan Winery & Resort (www.chateauelanatlanta.com), 40 minutes north of Atlanta, for example, has a conference center, spa, two championship golf courses, classic French fine-dining, and an Irish pub in addition to winery tours.

In New York state, the Finger Lakes and Long Island areas are prominent viticultural regions. The Hudson Valley, 90 miles north of New York City, is home to Benmarl Winery, in Marlboro, the country's oldest commercial winery and the oldest continuously farmed vineyard, dating to 1772.

Prohibition nearly wiped out Texas's wine industry, but it re-emerged in the 1970s and now offers 163 wineries in four regions. The prime sectors, because of their climate and proximity to Austin, 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 2012. 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.

62.6 American Whiskey Trail

The Distilled Spirits Council of the United States has developed the American Whiskey Trail (www.discus.org/trail) in conjunction with several distillers and historic sites in Virginia, Kentucky, and Tennessee. The trail is a heritage route tracing the history of spirits in America, from the colonial era, where whiskey had an important economic and social function in the fabric of the community, to the Whiskey Rebellion, through prohibition, and into modern times.

Participating distillers include Buffalo Trace (Franklin County, KY), George Dickel (Tullahoma, TN), Jack Daniel's (Lynchburg, TN), Jim Beam Distillery (Clermont, KY), Maker's Mark (Loretto, KY), Wild Turkey (Lawrenceburg, KY), and Woodford Reserve (Versailles, KY). The gateway to the American Whiskey Trail is George Washington's Distillery at Historic Mount Vernon.

63

DINING WITH ENTERTAINMENT

63.1 Overview

Combining entertainment with dining is not new, yet the popularity of jazz clubs and other types of restaurants that offer music and entertainment with dining is as strong as ever. Dinner theaters and comedy clubs also remain popular ‘eatertainment’ destinations.

“As the industry continues to get more competitive, entertainment really does become a differentiating component.”

Hudson Riehle, Sr. V.P. Research
National Restaurant Association

The restaurant and entertainment sectors were among the business segments hardest hit during the economic downturn. Consumers have experienced ‘frugality fatigue,’ as Ron Paul, President of Technomic (www.technomic.com), calls the phenomena, and many are resuming their spending at restaurants that offer fun along with an enjoyable dining experience.

“The whole ‘eatertainment’ thing is coming back. It’s back with a slightly older customer that wants quality cocktails and food.”

Chris Tripoli, President
A’La Carte Foodservice Consulting Group
Nation’s Restaurant News, 3/21/11

63.2 Live Music and Dining

Restaurants featuring all varieties of live music are popular across the country. Two chains operate music venues with restaurants, as follows:

- House of Blues (www.hob.com) is a home for live music and southern-inspired cuisine in an environment celebrating the African-American cultural contributions of blues music and folk art. The first location opened in 1992. There are now clubs/restaurants in Anaheim, Atlantic City, Boston, Chicago, Cleveland, Dallas, Houston, Las Vegas, Myrtle Beach, New Orleans, Orlando, San Diego, and West Hollywood.
- Hard Rock Live (www.hardrock.com) has locations in Hollywood (Florida), Orlando, and Mexico City.

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 (San Francisco, CA; www.yoshis.com)

63.3 Theme Restaurants

Theme restaurants, primarily Hard Rock Cafe and Planet Hollywood, were the rage of the early 1990s. As with most hot trends, interest shifted and the theme restaurant segment began to fade. Theme restaurants that have survived have done so by finding their own niche in the market and by placing a priority on their food quality.

Both Hard Rock Cafe and Planet Hollywood have survived by downsizing, changing with the times, and capitalizing on international appeal. And both have used their brand reputation to expand into the casino market.

Hard Rock, founded in 1971, now has 138 locations in 42 countries; only 42 are located in the United States. There are four Hard Rock casinos, in Las Vegas, Florida, and Mississippi. The Seminole Tribe of Florida owns the chain.

Planet Hollywood has downsized to five U.S. units – Honolulu, New York City, Niagara Falls, Las Vegas, and Orlando – and 12 international restaurants.

The tropical jungle-themed Rainforest Cafe, developed by Steve Schussler and launched in 1994, was sold to Landry's Restaurants in 2000. Today, Landry's operates 25 Rainforest Cafes in the United States and nine abroad, with average unit volumes of $8.5 million, according to the company.

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 32-year-old Chuck E. Cheese's (www.chuckecheese.com). The child-friendly pizza chain has more than 500 locations.

The following are other theme restaurants operating across the United States:

- At Harley-Davidson Cafe (Las Vegas, NV; www.harley-davidsoncafe.com), a giant three-dimensional sculpture of a Harley-Davidson motorcycle is integrated into the structure to appear as if it is bursting out of the northwest corner of the building. On the Las Vegas Strip, where land values are estimated at $13 million an acre, the Harley-Davidson Cafe is the last remaining freestanding restaurant; all others are affiliated with hotel casinos.
- NASCAR Sports Grill (Hampton, VA and Orlando, FL; www.nascarsportsgrill.com), a gathering place for racing fans, combines memorabilia, a 37-foot media wall with plasma screens and audio, and dining.
- Country music star Toby Keith has three branded Toby Keith's I Love This Bar & Grill (www.tobykeithsbar.com) restaurants, which display the singer's music memorabilia and host concerts. Locations are Oklahoma City, Thackerville, and Tulsa, Oklahoma.

63.4 Experiential Restaurants

Some restaurants provide an entertainment experience with the meal. The following are some notable examples:

- Dave & Buster's (www.daveandbusters.com) combines dining with the largest chain of amusement arcades in the country. The concept was launched in the late 1970s in Little Rock, Arkansas, when two side-by-side establishments, Slick Willy's World of Entertainment and Buster's Bar & Grill, combined operations. The are now 68 locations.
- Dinner in the Sky (www.dinnerinthesky.com) hoists up to 22 guests on a platform 18 stories above the ground for dinner. The experience is offered in Las Vegas, New York City, and Seminole Casino Coconut Creek (Florida), plus several cities in 31 countries.
- The decor of Jekyll & Hyde (New York City, www.jekyllpub.com) includes gargoyles and coffins. The ghoulish entertainment includes live skits, animatronics, and interactive puppets.
- 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, www.darkdining.com) is precisely what the name implies. Customers are led into a pitch-black dining room where they dine on a three-course meal, relying on their other four senses during the experience. The waiters are legally blind. Launched in 2005 as a Saturday-only concept, dining expanded to include Friday evenings. Locations have opened in San Diego, San Francisco, Dallas, and New York.

63.5 Mystery Dinner Theaters

There are approximately 200 mystery dinner theaters across the U.S.; the Orlando area alone has six. The following are some of the more prominent mystery dinner theaters:

- Agatha's A Taste of Mystery (Atlanta, GA; www.agathas.com)
- Bistro Romano Mystery Theatre (Philadelphia, PA; www.bistroromano.com)
- Haunted Dinner Theater (Williamsburg, VA; www.haunteddinnertheater.com)
- Murder by Chocolate (Houston, TX; www.murderbychocolate.com)
- Murder Mystery Train (Lansing, MI and Toledo, OH; www.murdermysterytrain.com)
- Mystery Cafe (Boston, MA; www.mysterycafe.com)
- Seminole Dinner Mystery Train (Ft. Myers, FL; www.semgulf.com)
- Sleuths Mystery Dinner Show (Orlando, FL; www.sleuths.com)
- The Dinner Detective (11 locations in California, Colorado, Illinois, and Texas; www.thedinnerdetective.com)

63.6 Dinner and a Movie

Attendance at movie cinemas has been on the decline since 2002, largely because of increased competition from digital downloads, video on demand, and DVD rent-by-mail; combined with increasingly theater-like home-entertainment technology. Hoping to lure moviegoers back to the cinema, several new ventures put a new spin on the 'dinner and a movie' concept, offering a combination of reserved seating, alcoholic beverage service, made-to-order dinners, and theaters that include leather seating, all while projecting the latest films via state-of-the art digital projection systems. The following are a few of the operations:

- AMC Theatres, the second largest cinema chain in the U.S., operates Fork & Screen (www.amctheatres.com/buckhead/) in Atlanta.
- Cinebarre (www.cinebarre.com), a unit of Regal Cinemas, which opened its first location in 2007, has locations in Colorado, North Carolina, Oregon, South Carolina, and Washington.
- Movie Tavern (www.movietavern.com) opened its first location in 2007 and has 16 locations, in Colorado, Georgia, Kentucky, Ohio, Pennsylvania, Texas, and Virginia.
- At nine of its locations, Muvico (www.muvico.com) offers seating connected to its

Premier Bistro & Bars.
- Studio Movie Grill (www.studiomoviegrill.com) had 12 locations, in Arizona, Georgia, Illinois, North Carolina, and Texas.
- iPic Theaters, (www.ipictheaters.com) has locations in Arizona, California, Florida, Illinois, Texas, Washington, and Wisconsin.
- Alamo Drafthouse Cinema (www.drafthouse.com) has 10 units and plans to expand throughout Texas.
- Cobb Theatres/Cine Bistro (www.cobbcinebistros.com) has seven locations, in Colorado, Florida, Georgia, and Virginia.

63.7 Speakeasies

While today's restaurants and bars work hard to maintain visibility, a handful strive to keep their locations secret, reminiscent of the speakeasies of the 20's and 30's throughout Prohibition. The following are among those with hidden doorways and coded access:

- Alchemy (www.alchemymidtown.com), tucked into an alleyway in the Midtown neighborhood in Tallahassee, Florida, allows patrons entrance only with a reservation and a secret password. Cocktails are crafted using ingredients reflective of the speakeasy era.
- In Tampa, a password is needed to gain entrance to Ciro's Speakeasy (www.cirostampa.com). Staff dress the part, with ladies wearing flapper-style cocktail dresses and gents donning shirts and ties with rolled-up sleeves and suspenders.
- In Atlanta, Prohibition (www.prohibitionatl.com) is a swanky club with the feel of a 1920s underground speakeasy. Guests ask around at a nearby bar for a secret phone number and step into an antique phone booth to call for entry.
- Prohibited, the bar at Symphony 8 (www.symphony8boston.com), in Boston, is entered via a cast-iron stairway hidden behind a bookshelf. A password, posted daily on Prohibited's Facebook page daily, is required for entry.
- In New York City, guests enter PDT [Please Don't Tell] (www.pdtnyc.com) through a phone booth in Crif Dogs, a hot dog shop.
- In Alexandria, Virginia, the entrance to PX (www.eamonnsdublinchipper.com) is marked only by a pirate flag and blue light. Reservations may be made only online. Upon arrival, guests knock, a small window in the door opens, and their reservations are confirmed before entry.
- At Safe House (www.safe-house.com), a spy-themed restaurant and bar in Milwaukee, guests must recite a password for entry. The staff is really into the espionage mission, holding James Bond screenings and talking in spy lingo. International Exports Ltd., on North Front Street, is in fact a craftily contrived 'front' for the Safe House.

63.8 Novel Restaurants

The following are some other unique concepts in restaurants:

- Encounter Restaurant & Bar (www.encounterlax.com), housed in the flying saucer-shaped building at the center of the Los Angeles International Airport, has a decor like something out of a sci-fi movie. Cinematic and surreal, the entrance to the restaurant looks extremely 1961 (the year the building opened). Bartenders dispense drinks from cosmic, laser-like taps.
- Firehouse Grill (Evanston, Illinois, www.firehousegrill.net) maintains much of the original interior of the old fire station it replaced.
- Forbes Island (www.forbesisland.com) is a floating restaurant built on a barge in San Francisco Bay. Patrons access the restaurant by boarding a boat from Pier 39 on Fisherman's Wharf. It took 10 years to obtain permits for the project, which includes the only privately built lighthouse in the United States.
- Garage (Seattle, www.garagebilliards.com) is located in a cavernous old auto repair shop. The restaurant includes a billiards hall and bowling alley.
- Hangar One Steakhouse (www.hangaronesteakhouse.com) is perfect for Wichita, which is dubbed the "Air Capital of the World." Servers dressed like flight attendants serve aviation-themed menu items in a makeshift airplane hangar.
- Heart Attack Grill (Dallas, Houston, and Las Vegas; www.heartattackgrill.com) takes pride in its unhealthy menu with such offerings as a four-patty Quadruple Bypass Burger®, French fries deep fried in pure lard, and a milk shake with the "world's highest butterfat content." Meals are served by waitresses dressed as nurses. Customers weighing over 350 pounds eat free.
- Locanda Vini e Olii (Brooklyn, New York; www.locandavinieolii.com) is a former drug store that retained much of the authentic decor, including the service counter, old cabinets, and medicine bottles.
- Ninjas do the serving at the Japanese concept restaurant Ninja New York (www.ninjanewyork.com).
- Attached to Best Western's Space Age Lodge, Outer Limits Restaurant (Gila Bend, Arizona; www.bestwesternspaceagelodge.com/html/Restaurant.htm) features a neon-lit rooftop UFO. Inside there is a floor-to-ceiling outer-space theme, along with a menu of American and Mexican fare.
- The decor at Space Aliens Grill & Bar (Bismark, North Dakota; www.spacealiens.com) features a 30-foot-high domed ceiling that displays a view of outer space. The dining room, bar, and arcade showcase alien sculptures along with an extensive menu.
- Evocative of being backstage at a concert, with picnic tables, concert lighting, large screen TVs, and project screens with a 360-degree speaker system, Rock & Brews (www.rockandbrews.com), co-founded by Gene Simmons of the rock band Kiss and which opened its first location in Los Angeles in 2011, has plans to expand the brand with six additional locations in 2013.
- Located below the Fairmont Hotel in San Francisco, the circa-1945 tropical lounge the Tonga Room (www.tongaroom.com) is a remarkably intact vision of midcentury Tiki culture. The Island Groove Band performs on the lagoon on a moving Gilligan's

Island-esque raft platform, and every half hour there's an indoor thundershower. The Tonga room serves Pacific Rim cuisine and tropical cocktails served in tiki vessels.

- The Cave (www.thecaverestaurantandresort.com), in Richland, Missouri, is the nation's only restaurant located in an actual cave. The space began as a natural cave that served as a dance hall in the 1920s.
- Supperclub (www.supperclub.com) is a multisensory experience incorporating unusual food, music, dancing, and experimental and avant-garde live performances (supperclub performers are often culled from art schools). With U.S. locations in San Francisco and Los Angeles, the restaurant offers a four-course internationally inspired meal from chef Nelson German served to diners who lounge fashionably on white beds.
- Eat. Drink. Do Laundry. Located in College Station, Texas, patrons at Harvey Washbangers (www.harveywashbangers.com) can enjoy free wi-fi, local microbrews, and a bar & grill menu along with the option of doing their laundry or dropping of clothes for dry cleaning.
- Housed in a Chateauesque mansion dating to 1908, the Magic Castle restaurant (www.magiccastle.com) is private club in Hollywood, California, for members of the Academy for Magic Arts and their guests, offering a menu inspired by the Victorian era.
- Opened in New York in 1993, Lucky Cheng's (www.luckychengsrestaurant.com), with a location in Las Vegas, offers guests pan-Asian cuisine with a drag show.

64

DOG-FRIENDLY RESTAURANTS

64.1 Overview

According to the American Pet Products Manufacturers Association (APPMA, www.appma.org), approximately 45.6 million U.S. households (40% of all households) own a dog.

For most dog owners, their pets are valued as companions and friends. In a Harris Poll (www.harrisinteractive.com), 92% of dog-owners said they consider their pet to be a member of the family.

A survey by GfK Roper Public Affairs & Media (www.gfkamerica.com) found 43% of dog owners feed their pet 'human food,' and 42% have taken the dog along on a vacation.

> **"It wasn't so very long ago that the phrase 'a dog's life' meant sleeping outside, enduring the elements, living with aches, and sitting by the dinner table waiting for a few scraps to land on the floor. Today's dog has it much better. Their menu reflects every fad in human food – from locally sourced organic meat and vegan snacks to gourmet meals bolstered by, say, glucosamine to ward off stiff joints."**
>
> *Bloomberg Businessweek*

64.2 Dog-friendly Restaurants

Local health codes generally mandate that pets be restricted from enclosed restaurants, but many allow dogs in open-air areas. Where permitted, some restaurants with outdoor seating will allow people dining outside to have their pets.

Taking one's dog to restaurants and other public places isn't unusual in European countries and in the trendy boutiques and outdoor promenades of coastal cities. Dining with a pet is relatively common in outdoor cafes throughout Southern California and Florida. In Miami Beach, for example, virtually all of the dozens of outdoor cafes that line Lincoln Road Mall accommodate patrons with their dogs. More recently, restaurants in the Northern states have been accommodating guests with dogs.

Dog-friendly patios even appeal to some diners without their pets. Karen Berndt, owner of the Harbor Fish Market & Grille (Baileys Harbor, Wisconsin), says the very presence of the animals at her upscale restaurant attracts vacationers who have traveled sans pet. Many request patio seating even when they have left their pets at home.

Some restaurants host special events for dog owners and their pets. Mutt Lynch Winery (Healdsburg, California), for instance, hosts private tastings and charity functions where the guests often consist of 300 humans and 100 or more dogs. The Sonoma County winery was voted the wine country's most dog-friendly winery by the monthly newspaper *Bay Woof* in San Francisco.

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

64.3 Dog Menus

Providing a bowl of water and sometimes complimentary treats has been standard fare for restaurants that accommodate patrons with dogs. Some restaurants have taken this service a step further, offering a menu for dogs. The following are some examples:

- Art and Soul restaurant on Capitol Hill in Washington, D.C., has a Puppy Patio Menu that includes a 3-ounce steak ($5) and homemade doggie granola treats ($5).
- Harbor Fish Market & Grille (Baileys Harbor, Wisconsin) offers special canine menu items such as scrambled eggs, chicken breast, and frozen custard ($2.50 to $3.95).
- Shake Shack (Miami Beach and New York City) serves The Pooch-ini® – Shackburger dog biscuits, peanut butter, and vanilla custard – for $3.50.

65

FOOD & WINE FESTIVALS

65.1 Overview

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

65.2 Prominent Food Festivals

The largest food festival is the 12-day Taste of Chicago, held annually in June, and attended by more than 3.6 million people. The 32nd Taste of Chicago (2012) collected more than $12 million in ticket revenue.

The following are other popular food festivals, many of which have annual attendance of 100,000 or more:

- A Taste of Colorado (Denver, CO; www.atasteofcolorado.com)
- ArtFeast (Santa Fe, NM; www.artfeast.com)
- Bite of Seattle (Seattle, WA; www.biteofseattle.com)
- Bridge City Gumbo Festival (Bridge City, LA; www.hgaparish.org/gumbofestival)
- Charleston Food & Wine Festival (Charleston, SC; www.charlestonfoodandwine.com)
- Culinary Festival (Scottsdale, AZ; www.scottsdalefest.org)
- Epcot International Food & Wine Festival (Lake Buena Vista, FL; https://disneyworld.disney.go.com/events-tours/epcot/epcot-international-food-and-wine-festival/)
- Finger Lakes Wine Festival (Watkins Glen, NY; www.flwinefest.com)
- Food Network Wine & Food Festival (New York, NY; www.nycwineandfoodfestival.com)
- Hudson Valley Wine & Food Fest (Rhinebeck, NY; www.hudsonvalleywinefest.com)
- Minnesota Monthly Food & Wine Experience (Minneapolis, MN; www.foodwineshow.com)
- Mohegan Sun Winefest (Uncasville, CT; www.sunwinefest.com)
- National Shrimp Festival (Gulf Shores, AL; http://alagulfcoastchamber.com/pages/ShrimpFestival)
- Pebble Beach Food & Wine (Carmel, CA; www.pbfw.com)
- Pensacola Seafood Festival (www.fiestaoffiveflags.org/pensacola-seafood-festival)
- RoadKill Cook-Off (Marlinton, WV; http://pccocwv.com/festival.htm)
- Sugarland Wine & Food Affair (Houston, TX; www.sugarlandwineandfoodaffair.com)
- Taste of Atlanta (Atlanta, GA; www.tasteofatlanta.com)
- Taste of Buffalo (Buffalo, NY; www.tasteofbuffalo.com)

- Taste of Dallas (Dallas, TX; www.tasteofdallas.org)
- Taste of Main (Bellevue, WA; http://tasteofmainbellevue.com)
- Taste of Vail (Vail, CO; www.tasteofvail.com)
- Taste Washington (Seattle, WA; www.tastewashington.org)
- Vintage Ohio (Kirtland, OH; www.visitvintageohio.com)
- Vintage Virginia (Centreville, VA; www.vintagevirginia.com)
- Wine & Food Experience (New Orleans, LA; www.nowfe.com)
- Wine & Food Festival (Dallas, TX; www.dallaswineandfoodfestival.com)
- Wine Expo (Boston, MA; www.wine-expos.com/Wine/expo/)
- Wine Festival (Nantucket, MA; www.nantucketwinefestival.com)
- Winter Wine Festival (Naples, FL; www.napleswinefestival.com)
- World Chicken Festival (London, KY; www.chickenfestival.com)
- Zinfandel Festival (San Francisco, CA; www.zinfandel.org)

One of the grandest food festivals is three-day The Food & Wine Classic (www.foodandwine.com/classic), held in Aspen, Colorado, which will celebrate its 32nd year in 2013. 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 12th year, the 2013 festival was held February 21-24. Over 30,000 people attended the main events and another 20,000 attended separate, lower cost family-oriented festival events.

Vegfest (www.vegfest.com), a series of annual vegetarian food festivals, are held in Boston, Detroit, Jacksonville, New York City, Portland, Salt Lake City, San Francisco, Seattle, Washington, D.C., and several other cities.

65.3 Market Resources

Directories of food festivals are available online at the following websites:

- www.festivals.com/food_beverage.aspx
- www.foodreference.com/html/upcomingfoodevents.html
- www.parade.com/food/festivals/index.html

66

HOLIDAY DINING

66.1 Overview

Although restaurants are an essential part of Americans' lives throughout the year, they also serve as a social oasis in times of celebration and special occasions.

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: 32%
- Father's Day: 23%
- New Year's Eve: 17%
- Easter: 16%
- New Year's Day: 12%
- Thanksgiving: 11%
- 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.

66.2 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.

66.3 Valentine's Day

According to the National Restaurant Association, Valentine's Day is the second 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%

Spending for the occasion topped $17.6 billion in 2012, with a tab average of $71.99 for an evening out, according to the association.

A survey by Zagat (www.zagat.com) found more couples dining out for Valentine's Day, with 44% reportedly doing so in 2012, with 20% going back to a favorite restaurant for the occasion.

Among those dining out for Valentine's Day, the following factors are most important in choosing a restaurant:

- General favorite: 42%
- Romantic atmosphere: 13%
- Special menu or promotion: 13%
- Picked by companion: 12%
- Restaurant they haven't been to before: 11%

The National Restaurant Association surveyed member restaurants on what type of promotions they offer around Valentine's Day. Responses were as follows:

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

66.4 Mother's Day

According to the National Restaurant Association, Mother's Day is the most popular formal occasion to dine out. National Restaurant Association research shows that 38% of Americans dine out on Mother's Day.

According to the association's Holiday Dining Survey, dining out on Mother's Day is more common among larger households; 44% of adults in households consisting of three or more individuals eat a Mother's Day meal at a restaurant, compared with 24% of one-person households. Respondents under age 25 and those ages 35-to-44 were 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.

66.5 Father's Day

According to the National Restaurant Association's Holiday Dining survey, 23% of Americans choose to celebrate Father's Day by dining out, an increase of six percentage points from a decade ago.

Larger households consisting of three or more individuals are more likely to dine out on Father's Day than were smaller households. Twenty-seven percent (27%) of adults in households with three or more individuals reported eating out on Father's Day.

Father's Day is the fourth most popular holiday or occasion to dine out.

66.6 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.

66.7 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.

66.8 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 about one in 10 Americans celebrate Thanksgiving Day by dining out, and 53% use restaurant-prepared takeout items for all or part of their holiday menu.

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

66.9 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 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.

66.10 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.

66.11 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.

67

LATE-NIGHT HOURS

67.1 Overview

Some family-dining chains such as Denny's, IHOP, Steak 'n Shake, and Waffle House have long had late-night service. Several years ago, many quick-service restaurants began operating with extended hours. More than 95% of McDonald's restaurants now have extended hours; several thousand are open 24 hours. More recently, many casual-dining chains have been extending operating hours.

> **"A growing number of casual-dining concepts are staying open past the typical 10 p.m. or 11 p.m. close, often keeping the doors and kitchen open until midnight or even 2 a.m. Many Applebee's Neighborhood Grill & Bars expanded their hours last year, and Red Robin Gourmet Burgers has added late-night happy hours over the past few months. Smokey Bones Bar & Fire Grill enhanced its evening offerings nearly a year and a half ago, and profitable operators like the 100-unit BJ's Restaurants have long offered late-night dining."**
>
> *Nation's Restaurant News*, 3/21/11

67.2 Late-Night Customer Demographics

According to Technomic (www.technomic.com), late-night hours appeal to patrons of various age demographics as follows:

- 18-to-24: 66%
- 25-to-34: 56%
- 35-to-44: 50%

- 45-to-54: 48%
- 55 and older: 43%

"[Late-night] customers range from factory third-shift employees to teenagers coming home from parties."

John Dillon, Vice President
Denny's
Nation's Restaurant News

67.3 Late-Night Operations

The following are operational characteristics of some restaurants that maintain late-night hours:

- At Denny's, servers working from 10 p.m. to 5 a.m. wear jeans and T-shirts instead of black pants and collared shirts. Alternative music is played during those hours, and a special late-night-only menu is offered. Forty-seven percent (47%) of late-night customers at Denny's are under age 24; two-thirds are coming from spots like night clubs or bowling alleys.
- Approximately 80% of Applebee's 2,000 locations are open until midnight or later; late-night revenue accounts for 13% of sales. Alcoholic beverage sales account for 14% of the late-night sales mix. In about 100 markets the brand has introduced Club Applebee's, offering 2-for-1 specials and theme nights like karaoke night, trivia night, and '80s night, and more for a late-night crowd.

"Staying open later allows us to have more fun with things later at night when the kids are in bed."

Brian Masilionis, Senior V.P.
Applebee's
Advertising Age, 8/6/12

- Smokey Bones Bar & Fire Grill, a 68-unit casual-dining chain, keeps its recently remodeled restaurants open until midnight and 2 a.m., depending on the market, and offers a special late-night menu. Bar business makes up half of sales between 10 p.m. and 2 a.m., compared with 15% to 18% during lunch and dinner.
- Night Kitchen, in Seattle, Washington, is open only from 6 p.m. until 6 a.m. A full breakfast menu is available at all hours; the restaurant has a 50-50 split between sales of breakfast and dinner fare.
- Boston's Restaurant & Sports Bar, with 50 locations in the U.S., keeps its restaurants open until 2 a.m. in most markets.

"We're open late because we're already paying those fixed costs. We do a big delivery service, so we definitely pick up late-night deliveries after other pizza chains close down. Since many of our restaurants are near hotels, we can do in-room delivery service for them or partner with them for late-night guests."

Randy Steinbrenner, Vice President
Boston's Restaurant & Sports Bar
Nation's Restaurant News, 3/21/11

68

LICENSING

68.1 Market Assessment

According to *The Licensing Letter*, retail sales of restaurant-branded licensed merchandise in 2012 was $4.29 million, a 3.9% increase over 2011.

68.2 Case Studies

Boston Market

- Boston Market terminated its licensing agreement with Heinz in 2012, shifting its product line to Overhill Farms, which manufactures, distributes, and markets the chain's line of branded frozen meals. Under the Heinz licensing agreement, sales of 30 Boston Market frozen meals in 2010 reached more than $100 million.

California Pizza Kitchen

- One of the most prominent brands among restaurant-branded grocery products is California Pizza Kitchen, whose licensing agreement with Kraft Foods dates to 1998. Annual sales of frozen California Pizza Kitchen products are $160 million, according to *The Wall Street Journal*; licensing royalties are $6.6 million.

Cinnabon

- Cinnabon, a brand of Focus Brands, has more than 50 licensed retail products. Combined annual retail sales are about $400 million.

"There's Cinnabon branded bread, cream of wheat, bagels, a bake mix for muffins, Toaster Strudels, cereal, pancake syrup, nuts, popcorn, and coffee creamer, to name a few."

Nation's Restaurant News, 6/25/12

Dunkin' Donuts'

- Dunkin' Donuts' licensed coffee, marketed by Smucker's, has annual retail sales of approximately $250 million, according to *Nation's Restaurant News*. Dunkin' Donuts also sells its own retail line of packaged coffee in its stores.

Jamba Juice

- Jamba Juice has one of the more ambitious licensing programs. Its licensed product portfolio includes nine partnerships with products including energy drinks, fruit-flavored coconut water drinks, novelty frozen desserts, and a home smoothie kit. Recently developed products awaiting licensing include energy bars and yogurt. According to James White, CEO of Jamba Juice, the company's goal is $1 billion in retail sales, or about $500 million at wholesale, for its licensed products. Royalty rates range from 4% to 7% of wholesale revenue.

"The goal is to build Jamba Juice into a multi-category health-and-wellness lifestyle brand along the lines of Kashi or Burt's Bees."

Nation's Restaurant News, 6/25/12

P.F. Chang's China Bistro

- The chefs at P.F. Chang's China Bistro created a line of frozen meals licensed by ConAgra for manufacturing and distribution to supermarkets. The products, launched in 2010, emphasize convenience – dinners for two are promoted as being skillet-ready in 13 minutes or less. Annual sales are more than $100 million, according to *Nation's Restaurant News*.

Starbucks

- Starbucks has numerous licensed products, the largest being its Frappuccino chilled coffee drinks, produced by North American Coffee Partnership, a partnership with PepsiCo. Launched in 1996, annual U.S. retail sales of Frappuccino surpass $1 billion. Partnering with Acosta Sales and Marketing (www.acosta.com), Starbucks launched the VIA Ready Brew instant coffee line in 2009, with sales reaching $135 million during its first year. In 2011, Starbucks ended its licensing agreement with Kraft, taking its bagged coffee and tea distribution in-house. Starbucks continued to expand its lines of licensed products in 2012 with the acquisition of the Teavana retail tea brand for $620 million and the La Boulange bakery brand for $100 million.

"Starbucks ... has made consumer packaged goods (CPGs) a cornerstone of its growth strategy in the past two years. Officials say they expect CPGs will rival the chains coffeehouse business, as they roll out one potential billion-dollar category after another."

Nation's Restaurant News, 6/25/12

Wolfgang Puck

- Celebrity chef Wolfgang Puck has created a restaurant, media, and licensed products business worth $20 million annually, according to an estimate by *Forbes* (July 2012). Annual sales for Wolfgang Puck retail products are around $150 million, according to *Nation's Restaurant News*.

68.3 Market Trends

Added revenue from licensing deals increased in importance for some restaurant operators during the economic downturn and the number of licensed brands available in supermarkets increased dramatically. Now, some brands are taking a closer look at the market and potential pitfalls.

Some restaurant chain operators are concerned that sales of licensed products, for which they typically receive a royalty of only about 5%, may compete with their restaurant sales. Taco Bell, for instance, has a partnership with Kraft Foods for its taco kits and sauces, but does not plan to expand its licensing efforts.

"I'm not a big believer in putting our brand into retail. I want the innovation we have going on to drive you to come to Taco Bell."

Greg Creed, CEO
Taco Bell
Nation's Restaurant News, 6/25/12

There are concerns that the market for licensed grocery products may become saturated. Grocers may be approaching the limit of shelf space they are willing to give to restaurant brands.

> **"The parade of restaurant chains offering licensed retail products is growing. IHOP recently launched frozen breakfasts and a line of syrups, Olive Garden now offers branded salad dressings at Sam's Club, and products are in development by Fazoli's and Red Robin Gourmet Burgers. But how much is too much? Grocery store shelves are already packed with products from Cinnabon, Dunkin' Donuts, Hooters, T.G.I. Friday's, P.F. Chang's China Bistro, Romano's Macaroni Grill, and countless others."**
>
> *Nation's Restaurant News*, 6/25/12

68.4 Market Resources

EPM Licensing Letter Sourcebook, The Licensing Business Handbook, and *The Licensing Letter,* EPM Communications, 19 West 21st Street, #303, New York, NY 10010. (212) 941-0099. (www.epmcom.com)

69

LOCALLY SOURCED & ORGANIC FOOD

69.1 Local & Organic Preferences Among Consumers

In a 2012 survey by the National Restaurant Association (www.restaurant.org), 64% of adults said locally sourced menu items are important when choosing a full-service restaurant (FSR); 43% said organic or environmentally friendly food was important. In choosing a quick-service restaurant (QSR), locally sourced and organic menu items were cited as an important consideration by 63% and 45% of adults, respectfully. By gender and age, those placing a priority on locally sourced and organic menu items are as follows:

	Locally Sourced		Organic/Environmentally Friendly	
	FSR	QSR	FSR	QSR
Gender				
• Men:	59%	60%	38%	40%
• Women:	69%	65%	47%	50%
Age				
• 18-to-34:	58%	58%	46%	48%
• 35-to-44:	68%	67%	37%	40%
• 45-to-54:	63%	63%	44%	46%
• 55-to-64:	67%	64%	44%	45%
• 65 and older:	68%	65%	41%	43%

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

A survey of 1,854 members of the American Culinary Federation (www.acfchefs.org) asked chefs to rank the importance of 214 menu trends in 2011. Locally sourced meats and seafood ranked first in the survey; locally sourced produce ranked second.

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

	Produce	Meat or Seafood
• Fine-dining:	87%	75%
• Casual-dining:	63%	55%
• Family-dining:	63%	59%

"Consumers' interest in local sourcing continues to grow, and more restaurants are forging connections with farmers and promoting local items."

Nation's Restaurant News, 1/24/11

69.2 Locavores

As concerns about food safety rise, the number of locavores – those who eat locally produced foods when available – is also increasing. While locally grown foods are not necessarily healthier, consumers are comforted by knowing the source of their food items.

Opinions vary among consumers as to what constitutes 'local' food products. In a recent survey by The Hartman Group (www.hartman-group.com), consumers defined 'local product' as follows:

- Within 100 miles: 50%
- Within my state: 37%
- Within a region: 4%
- In the United States: 4%

Analysis by A.T. Kearney (www.atkearney.com) asking if shoppers are willing to pay more for local foods found the following responses:

- Single urban households: 95%
- Young couples w/o kids: 78%
- Affluent families: 71%
- Senior citizens: 68%
- Middle income families: 67%
- Low income families: 57%

In a survey by Mintel (www.mintel.com), however, only 28% of consumers said they would be willing to pay more for menu items that were sourced locally.

Grocery shoppers largely embrace the increase in local food options because they believe it helps local economies (66%), delivers a broader and better assortment of products (60%), and provides healthier alternatives (45%). Some shoppers say they buy local food to improve the carbon footprint (19%) and to help increase natural or organic production (19%).

Shoppers will switch stores for a better local food selection, with almost 30% of grocery shoppers saying they consider purchasing food elsewhere if their preferred store does not carry local foods. When asked about the availability of local food at their preferred supermarket, 65% say their supermarket offers at least some kind of locally sourced food. Only 5% indicate they shop for local foods at big-box retailers, 15% at national supermarkets. Overwhelmingly respondents say their main source for local food is still the local farmers market and farm stores.

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

69.3 Local Sourcing At Limited-Service Restaurants

While local items most frequently are found on fine-dining, upscale casual-dining, and independent restaurant menus, a few limited-service chains also stand out. Chipotle Mexican Grill, for example, purchases at least 25% of its romaine lettuce, green bell peppers, jalapeños, and onions from farms within 200 miles from restaurants. The 1,250-restaurant chain purchases over 75 million pounds of naturally raised and locally processed meats annually.

Several other chains source select local food products for some regional locations. McDonald’s outlets in Washington State, for instance, purchase all of the milk, 95% of potatoes and fish filets, and 85% of apples from Pacific Northwest sources.

Sysco, the largest foodservice distributor in the U.S., has set up localcrop.com, a website that solicits local farmers to make their products available to local restaurants.

Most large restaurant chains find it impractical to source more than a few select menu items locally, primarily because local farmers simply cannot provide food products in the quantities required. Uno Chicago Grill, for example, had set up a project for a Maine farmer to supply tomatoes to its restaurants in the Northeast; the project lasted only three weeks because the farmer could not keep up with demand.

Adding hundreds or thousands of small local farmers to the supply chain of a major restaurant corporation – and subjecting them to the same rigorous safety standards as current suppliers – would be an impractical task.

“Operational and logistical challenges, short growing seasons in colder climates, food handling safety, supply issues and higher food costs are among the obstacles that keep many restaurants from implementing local food sourcing on a large scale.”

Nation’s Restaurant News, 1/24/11

Few diners are aware of the safeguards that protect the food they eat in restaurant chains. Darden Restaurants, for instance, employs over 50 biologists and public health specialists, 17 field plant inspectors, and 20 quality control managers who review and certify the food products of the 1,500 suppliers who serve its 1,800 restaurants.

69.4 Chef- and Restaurant-owned Farms

Several chefs and restaurateurs have acquired farms to supply their restaurants with fresh produce. Great Performances (www.greatperformances.com), a New York City-based caterer, for example, acquired Katchie Farm, a 60-acre organic farm in Kinderhook, New York, with some 29 different varieties of vegetables – from arugula to winter squash – as well as a selection of culinary herbs.

Other restaurants with their own farm operations include 610 Magnolia (Louisville, KY; www.610magnolia.com), Bayard’s (New York, NY; www.bayards.com), Bern’s Steak House (Tampa, FL; www.bernssteakhouse.com), Dahlia Lounge (Seattle, WA; www.tomdouglas.com), Manresa (Los Gatos, CA; www.manresarestaurant.com), and Primo (Rockland, ME; www.primorestaurant.com).

A similar pairing is farms that operate restaurants on site. One such is Blackberry Farm (www.blackberryfarm.com), a 4,200-acre farm in Walland, Tennessee. As well as dining, Blackberry Farm offers 63 guest accommodations, which include three meals per day of the farm’s celebrated Foothills Cuisine. The following are other farm-based restaurants:

- 21 Acres (Woodinville, WA; www.21acres.org)
- Arrows Restaurant (Ogunquit, ME; www.arrowsrestaurant.com)
- Blue Hill at Stone Barns (Pocantico Hills, NY; www.bluehillstonebarns.com)
- Celebrity Dairy (Silver City, NC; www.celebritydairy.com)
- Everett Family Farms (Soquel, CA; http://everettfamilyfarm.com)
- Flow at 14 Acre Farm (Jim Thorpe, PA; www.14acrefarm.com)
- Inn at Baldwin Creek (Bristol, VT; www.innatbaldwincreek.com)
- Gathering Together Farm (Philomoth, OR; www.gatheringtogetherfarm.com)
- Paradise Farms (Homestead, FL; www.paradisefarms.net)
- Patowmock Farms (Lovettsville, VA; www.patowmackfarm.com)
- Shelburne Farms (Shelburne, VT; www.shelburnefarms.org)
- The Loft at TradersPoint Creamery (Indianapolis, IN; www.traderspointcreamery.com)

Some restaurants partner with local farms to sponsor periodic farm-to-table dinners where their patrons and food providers can mingle. Eno Terra Restaurant (Kingston, NJ; (www.enoterra.com), Michael’s Genuine Food & Drink (Miami, FL, www.michaelsgenuine.com), and Park Place on Main (Louisville, KY; www.diningonmain.com), among others, have such programs.

69.5 Organic Menus

While the interest in organic foods was first seen in supermarket food purchases, demand has increasing in the restaurant sector.

"While the growth in organic purchases is primarily in the retail category, consumers are demanding these offerings more when they dine out, and restaurant operators need to meet these demands."

Nation's Restaurant News

Recently launched chains with organic menus include Evos (www.evos.com), FreeFoods NYC (www.freefoodsnyc.com), and Pizza Fusion (www.pizzafusion.com).

70

LOYALTY PROGRAMS

70.1 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.

70.2 Restaurant Programs

According to the 2012 *National Household Survey*, by the National Restaurant Association (www.restaurant.org), roughly one out of four full-service and quick-service restaurants offer frequent-diner programs.

Based on survey responses, the following percentages of restaurants reported their programs were more popular in 2012 compared to 2011:

- Fast-casual: 61%
- Family-dining: 59%
- Fine-dining: 53%
- Quick-service: 53%
- Casual-dining: 46%

70.3 Customer Participation

Overall, 36% of adults participate in a frequent-diner program at a full-service restaurant, fast-food place, or coffee shop. Among this group, the types of restaurants whose programs they participate in are as follows (source: National Restaurant Association):

- Off-premises/delivery: 51%
- Quick-service: 43%
- Full-service: 42%

Women are more likely than men to participate (41% versus 31%), and young adults are more likely than older adults to participate.

70.4 Social Networking With Loyalty Customers

Many restaurants have integrated loyalty programs with their social networking sites. One example is Tasti D-Lite, which linked its TastiRewards loyalty program through the point-of-sale system to Facebook, Twitter, and Foursquare. When loyalty-club members swipe their TreatCards at the POS, a tweet, a Facebook post, and check-ins on Facebook Places and Foursquare are sent to those customers' friends and followers. The messages contain a coupon for the friends and followers.

Another concept marrying loyalty rewards with social networking is Plink (www.plink.com), which offers users cash as well as Facebook credits and other rewards from purchases at participating restaurants like Red Robins, Taco Bell, and Outback Steakhouse.

"If you can get these credits that you would have spent money on anyway, people are going to jump all over it. It's a great way to do another aspect of loyalty."

Brian Lee, President
Revelation Advertising & Social Media
Nation's Restaurant News, 4/30/12

An expansion of the of loyalty programs tied to social sites sees loyalty rewards tied to mobile phones and bank cards that are linked to social apps. Paper cards and keychain fobs are falling away as loyalty programs are adoption these new platforms.

Through such providers as Mocapay, Punchh, Front Flip, and Level Up, customers snap a photo of their receipt or scan a code with a smartphone or simply use their linked credit card and rewards are seamlessly registered.

Brands using such virtual platforms glean valuable data on their customers (location, frequency of visits, spending, etc.) which allow them to more narrowly target discounts and rewards and tailor future programs.

71

NON-TRADITIONAL RESTAURANT SITES

71.1 Pop-Up Restaurants

Pop-up restaurants, generally operated by notable chefs and restaurateurs, are temporary restaurants that open for brief time periods. They often are set-up in conjunction with festivals. While not a new concept, pop-up restaurants have become trendy because social media allows patrons to follow the movement of these restaurants and make online reservations. The following are some examples:

- Former contestants from Bravo TV's *Top Chef*, cooked two at a time for six days each at The Top Chef Kitchen, a pop-up restaurant that operated in New York City's Tribeca neighborhood during October and November 2012. Chefs Richard Blais, Jennifer Carroll, Tiffany Derry, Tiffani Faison, Mike Isabella, Edward Lee, Antonia Lofaso, Paul Qui, Grayson Schmitz, and Fabio Viviani participated. The pop-up was staged to help kick off the 10^{th} season of the show.
- California chef Gary Menes hosts a pop-up restaurant called Le Comptoir (www.lecomptoirla.com) at various locations in the Los Angeles vicinity.
- Michelle Bernstein (www.chefmichellebernstein.com), a James Beard Foundation Award-winning chef, operated The Kitchen At Orchid in conjunction with The Pleasure Garden, a three-month theatrical pop-up entertainment experience in Miami.
- Sushi Samba (www.sushisampa.com), a popular restaurant in Miami Beach, opened Samba Pop for two weeks in December 2012 in conjunction with Art Basel, the largest annual arts festival in the U.S.

"As pop-ups become more popular, their nature is changing, with some operators using them as a launch pad for a more permanent presence."

David Coffer, Chairman
The Coffer Group
Nation's Restaurant News, 3/5/12

71.2 Restaurants At Auto Dealerships

While most auto dealerships only install vending machines in their showrooms, a few have opened restaurants as a convenience for their customers.

The following are example auto dealership restaurants:

- Bistro 33 at Mercedes-Benz of Rocklin (Rocklin, CA; http://edh.bistro33.com)
- Dal Toro at Lamborghini (Las Vegas, NV; http://daltoro.com/LasVegas/)
- Horseless Carriage Restaurant (North Hills, CA; www.galpin.com/the-horseless-carriage-restaurant)
- Twin Creeks Cafe at Frank Motor Co. (Fort Worth, TX; www.facebook.com/TwinCreeksCafe)
- Vintana Wine + Dine at Lexus Centre of Escondido (Escondido, CA; www.cohnrestaurants.com/menu-restaurants/vintana-wine-dine/ and www.lexusescondido.com)

"It's been said that car dealership showrooms have indeed started to become one of today's trendy dining sites."

KNG, 1/26/12

71.3 Restaurants At Car Washes

Having a restaurant located at a car wash can be convenient for customers. The following are examples of operators that combine dining and full-service bats at car washes:

- 34th Street Burgers + Deli at the Sparkling Image Car Wash (Bakersfield, CA; www.sparklingimage.com)
- Auto Spa Bistro (Atlanta, GA; www.autospabistro.com)
- Car Wash Cafe (Kilmarnock, VA; no website)
- Chamois Restaurant/Car Wash (Mattawan, MI; www.facebook.com/pages/Chamois-RestaurantCar-Wash/102228449836700?sk=wall)
- Europa Car Wash & Cafe (Miami, FL; www.europainmiami.com)
- Metro Organic Bistro at Karma Car Wash (Miami, FL; www.karmacarwash.com)
- The Hub Car Wash & Diner (Colorado Springs, CO; www.thehub.com)

71.4 Restaurants At Museums and Tourist Attractions

Museums and other tourist attractions are increasingly being paired with upscale dining to enhance the visitor experience. The following are some of the most recognized (sources: *Bloomberg Businessweek*, *USA Today*, and local media sources):

- Albert's at the San Diego Zoo (San Diego, CA; www.sandiegozoo.org/zoo/dining.html)
- Cafe Alcazar at the Lightner Museum (St. Augustine, FL; www.cafe-alcazar.com)
- Gertrude's at the Baltimore Museum of Art (Baltimore, MD; www.johnshields.com/restaurant/rest/gertrudes.html)
- Mr. Rain's Fun House at the American Visionary Art Museum (Baltimore, MD; www.mrrainsfunhouse.com)
- Museum Restaurant at the Philadelphia Museum of Art (Philadelphia, PA; (www.philamuseum.org/dining)
- The Modern at the Museum of Modern Art (New York, NY; www.themodernnyc.com)
- The Restaurant at the J. Paul Getty Museum (Los Angeles, CA; www.getty.edu/visit/see_do/eat_shop.html)
- Zola at the International Spy Museum (Washington, DC; (www.spymuseum.org/shop/zola.php)

71.5 Restaurants At Parks and Botanical Gardens

- Arizona Room (Grand Canyon National Park, AZ; www.grandcanyonlodges.com/arizona-room-418.html)
- Bartolotta's Lake Park Bistro (Lake Park, Milwaukee; WI; www.lakeparkbistro.com)
- Beach Chalet Brewery and Restaurant (Golden Gate Park, San Francisco, CA; www.beachchalet.com)
- Boathouse Forest Park (St. Louis, MO; www.boathouseforestpark.com)
- Café Phipps at Phipps Conservatory & Botanical Garden (Pittsburgh, PA; http://phipps.conservatory.org/visit-phipps/cafe-phipps.aspx)
- Garden Room Cafe (Garden of Georgia, Athens, GA; www.uga.edu/botgarden/cafe.html)
- Glass House Cafe at Fairchild Tropical Gardens (Coral Gables, FL; www.fairchildgarden.org)
- Jordan Pond Restaurant (Acadia National Park, ME, www.jordanpond.com)
- Lakota Dining Room at Sylvan Lake Resort (Custer State Park, SD; www.custerresorts.com/sylvan-lake-lodge/)
- North Pond (Lincoln Park, Chicago, IL; www.northpondrestaurant.com)
- Pineapple Room Restaurant at Cheekwood (Nashville, TN; www.cheekwood.org)
- The Ahwahnee (Yosemite National Park, CA; www.yosemitepark.com/Dining_AhwahneeDiningRoom.aspx)
- The Central Park Boat House Restaurant (Central Park, New York, NY; www.thecentralparkboathouse.com)

71.6 Restaurants At Retail Stores

Common years ago at large department stores, fancy tea rooms and restaurants are making a comeback among some retailers. High-end stores like Macy's, Neiman

Marcus, and Nordstrom have restaurants.

Macy's offers upscale dining at several of its U.S. locations. To develop its restaurant offerings, Macy's put together a team of 16 select chefs, including Rick Bayless, Cat Cora, Todd English, Marcus Samuelsson, Nancy Silverton, and Takashi Yagihashi, each of whom has created an in-store concept restaurant.

"In the 1900s, many U.S. department stores ran restaurants and tearooms. Some achieved iconic status and continue to serve customers today, including Chicago's Walnut Room at the former Marshall Field's flagship (now a Macy's) and the Zodiac restaurant at a Neiman Marcus store in Dallas. More recently, Nordstrom, which has offered food for many years, has tested operating a contemporary diner called Sixth & Pine and added espresso bars. The department store chain currently operates seven different kinds of in-store restaurants, for a total of more than 200 eateries and coffee bars."

Bloomberg Businessweek, 12/10/12

Polo Ralph Lauren operates the clubby looking, 85-seat RL in its Chicago store. Managed by Gibsons Restaurant Group (www.gibsonsrestaurantgroup.com), the restaurant does more than $7 million in annual sales.

Tommy Bahama, operator of more than 80 tropical-theme sportswear stores, also operates 13 full-service Tommy Bahama Tropical Cafe & Emporium restaurants. Restaurants average about $6.5 million in annual sales, and stores with restaurants typically sell more apparel than those without casual-dining adjuncts.

“Shoppers at the new Tommy Bahama flagship store on Manhattan’s Fifth Avenue are be able to buy one of the brand’s signature tropical-print shirts before grabbing a drink at the Marlin Bar, next to the selling floor. Later they can head upstairs to order macadamia nut-encrusted snapper at a restaurant perched above the retailing space. Adding island-inspired dishes and $12 chauffered sidecar martinis to the clothing chain’s product mix isn’t a marketing gimmick or loss leader. Tommy Bahama has become a model for other retailers: Its 13 combination restaurant-stores generate two and a half times the sales per square foot of the apparel chain’s 97 regular locations worldwide.”

Bloomberg Businessweek, 12/10/12

Ikea has restaurants in all of its 301 stores worldwide, including its 38 U.S. locations. The multilevel Ikeas have a quick-service restaurant on an upper floor, most with as many as 400 seats. Stores also have limited-menu bistros on the ground floor next to a section that sells Swedish packaged foods.

In 2012, JCPenney announced plan to add juice bars and coffee shops to hundreds of its stores over the next few years.

72

NUTRITION

72.1 Healthful Dining

Restaurant operators will continue to emphasize healthier fare in 2013 as more and more consumers are becoming nutrition conscious.

In a 2012 survey by the National Restaurant Association (www.restaurant.org), 76% of adults said healthy menu items are important when choosing a full-service restaurant (FSR); 75% said so about their choice of a quick-service restaurant (QSR). By gender and age, those placing a priority on healthy menu items are as follows:

	FSR	QSR
Gender		
• Men:	71%	69%
• Women:	80%	80%
Age		
• 18-to-34:	76%	72%
• 35-to-44:	76%	74%
• 45-to-54:	76%	80%
• 55-to-64:	73%	75%
• 65 and older:	78%	74%

According to *Healthy Eating Consumer Trend Report*, a January 2013 report by Technomic (www.technomic.com), 38% of adults say they are more likely to visit restaurants that have healthy menu options, even if they do not order a better-for-you item. This was an increase from 33% who responded similarly to the same question in a 2010 survey.

The following are other findings of the study:

- Sixty-four percent (64%) of consumers agree that it is important to eat healthy and pay attention to nutrition; 57% said so in a 2010 survey.
- Fifty percent (50%) of consumers say they would like restaurants to offer more healthy foods, and nearly as many say they would probably order these options if they were offered.
- More consumers in 2012 than in 2010 reported that they consume local, organic, natural, and sustainable foods at least once a week.
- Half of consumers say that descriptors such as low salt, low-fat and low sugar clearly signal health, yet strongly detract from the taste of food. In contrast, foods that indicate a serving of fruit or vegetables or 100% whole wheat highlight health while strongly enhancing consumers' taste perceptions.

According to The NPD Group (www.npd.com), 9% of all restaurant visits are made based on customers' desire for healthful or light fare, a figure that has remained relatively constant for five years.

72.2 Portion Control

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

Surveys by The NPD Group found that while a majority of consumers have intentions to eat healthier, many do not carry out these plans. Fifty-three percent (53%) said they were going to limit their calorie 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.

72.3 Menu Labeling

Complying with provisions of the Patient Protection and Affordable Care Act, the U.S. Food and Drug Administration issued regulations for menu-labeling in late 2011.

Restaurant chains with 20 or more units will be required to post on their menus and drive-through signs calorie counts and information about how many calories a healthy person should eat daily. Restaurants in California are already required to post this information.

Challenges to the requirement were upheld by the U.S. Supreme Court, however the precise regulations and a timetable for implementation have not yet been promulgated.

A comparison of sales at quick-service restaurants with and without posted calorie information, conducted by The NPD Group, found the menu labeling had little effect on guest ordering patterns. Ordering for lunch and dinner was as follows:

	Without Labeling	With Labeling
• Average number of items ordered:	3.3	3.2
• Average calories ordered:	1,021	901
• Average check amount:	$6.40	$6.20

In a November 2012 survey of restaurant patrons' attitudes, Technomic found that 65% favor nutritional labeling in restaurants, with the strongest demand for listing of calories and sodium content. Seventy percent (70%) of adults say they care that chain restaurants disclose calorie and other nutritional information on their menus; 68% want nutritional information on all restaurant menus, not just chains. About the same percentage claim that having this information is helpful in making ordering decisions and believe it has a positive impact on consumer health and nutrition.

Many restaurant chains are proactively posting calorie information. McDonald's, the largest U.S. restaurant chain, began posting calorie counts on menus at its 14,000 U.S. locations in September 2012. The chain also introduced an app that provides customers with information about calories in its products and helps them build a customized meal plan.

In addition to calorie data, some restaurant chains post information about ingredients, pointing out potential problems for those with food allergies and other dietary restrictions.

72.4 Trans Fat

Recent campaigns by several federal agencies have focused public attention on health issues related to the consumption of trans fats. In response, most restaurant chains have at least addressed the issue, with many already reducing or eliminating foods with trans fats from their menus.

Several cites have banned, or are considering banning, trans fats at restaurants. Tiburon, California, was the first to do so, in 2005. As of 2008, all 24,600 restaurants and foodservice operations in New York City were required to cease using most frying oils containing trans fats. Trans fat controls have also been enacted in Philadelphia, Seattle, and other cities.

In 2008, California became the first state to ban trans fats in restaurants. Under the law, trans fats were excised from restaurant products beginning in 2010 and from all retail baked goods by 2011. Packaged foods are exempt.

72.5 Reduced Sodium

There are indications that the next big issue of focus will be reducing sodium intake. Many consumers are aware that consuming too much salt has been linked to high blood pressure and have reduced the amount they use in cooking and at the table. There are increasing concerns, however, about high levels of sodium from processed foods and restaurant cuisine.

Today, the average American takes in about 4,000 mg of sodium daily; the adequate intake for healthy body function in people under 50 is only 1,500 mg. People over 50 need only 1,200 to 1,300 mg of sodium. The FDA has said most people can safely ingest up to 2,400 mg of sodium a day – that's equal to about one teaspoon of salt.

In January 2010, New York City unveiled a voluntary health initiative with a goal of 25% reduction of salt in restaurant and packaged food by 2015. Dr. Thomas Farley, the city health commissioner, claims support for the initiative from health agencies in other cities and states, suggesting that similar measures may soon be launched elsewhere.

Many restaurant chains have been proactive in reducing sodium in menu items before being mandated to do so. Au Bon Pain, Burger King, Denny's, and Yum! Brands, among others, have launched low-sodium initiatives.

73

RESTRICTIVE DIET MENUS

73.1 Overview

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

73.2 Gluten-Free Menu Items

An increasing number of restaurants are responding to people with celiac disease, an intolerance to gluten. Estimates of the number of Americans with celiac disease range from three million to 18 million. An estimated 5% of restaurant visits are by guests with gluten issues.

The interest in gluten-free foods goes beyond those with celiac disease. According to *Gluten-Free Foods And Beverages In The U.S.*, an October 2012 report by Packaged Facts (www.packagedfacts.com), 18% of U.S. adults look for gluten-free options.

> **"Growing consumer suspicion that grain-based diets are unhealthy or unnatural – hence the recent popularity of the so-called Paleo diet – have helped boost the gluten-free industry. And the perception that gluten-free products are better for the body-conscious buyer has also helped. Celebrities such as Miley Cyrus have credited their weight loss to gluten-free eating. But experts have cautioned that such a diet isn't for everyone – only those diagnosed with celiac disease."**
>
> *Los Angeles Times*, 10/23/12

In a survey by the National Restaurant Association (www.restaurant.org), chefs named gluten-free/food allergy-conscious meals as one of the top 10 trends in both full-service and quick-service restaurants in 2013.

There was a surge in restaurant offerings of gluten-free menu items about two years ago. According to Technomic (www.technomic.com), the number of U.S. restaurants with gluten-free menus rose 61% in 2011.

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

73.3 Kosher Cuisine

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

Certification agencies called mashgiachs supervise food production and preparation to ensure that food is kosher. According to *Kashrus Magazine*, which tracks kosher certification, there are approximately 1,100 kosher certification organizations in the U.S.

Lubicom (www.lubicom.com) estimates the U.S. retail market for Kosher foods at $13 billion.

According to a recent survey by Mintel, among the 21% of American adults who buy kosher products, 55% say they believe the products to be safer or healthier.

Kosher restaurants are mainly concentrated in large cities, especially those with a large Jewish population. One-third of the nation's Jewish population is within approximately 300 miles of New York City.

According to *Restaurant Business*, there has recently been an increase in openings of high-end kosher restaurants across the U.S.

In South Florida, kosher-Asian-fusion cuisine has become popular, and a number of Thai, Japanese, and other Asian chefs have set themselves apart in a competitive market thanks to Rabbinical supervision and technical advise.

Subway maintains several kosher restaurants in the U.S.

73.4 Halal Foods

Muslims are allowed to eat only Halal foods under Islamic dietary guidelines. The criteria specify what foods are allowed how the food must be prepared. The foods addressed are mostly 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. Even McDonald's locations in Dearborn, Michigan, for example, which has the largest concentration of Arab-Americans in the U.S., offers meals meeting Islamic dietary standards.

73.5 Vegetarian Cuisine

A survey by the National Restaurant Association found that 20% of consumers are likely to look for a restaurant that serves some vegetarian items.

According to the Vegetarian Resource Group (www.vrg.org), 3.4% of U.S. adults, or 7.5 million adults, do not eat meat, poultry, or fish and are considered true vegetarians. Many other people consider themselves vegetarian but may occasionally consume meat, poultry, or fish.

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 chose not to consume meat for ethical, religious, health, and ecological reasons. An estimated two million U.S. adults are vegans.

The Vegetarian Resource Group estimates that 13% of adults are flexitarians, people who subsist primarily on plant-based foods but are not strictly vegetarians.

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.

74

SEAFOOD

74.1 Seafood Entrees in Restaurants

According to The NPD Group (www.npd.com), restaurant patrons order 3.4 billion servings of fish and seafood at restaurants each year, about 6% of all restaurant orders. The 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%

74.2 Trends

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.

Restaurant servings for non-fried fish increased 1% in 2011, while servings of fried fish dropped 6%, according to The NPD Group. Servings of fried and non-fried shrimp declined 3% and 1%, respectively. Increased consumption of non-fried seafood is primarily due to perceived health benefits.

A sampling of menu items from 4,800 restaurants, conducted in April 2012 by Datassentials (www.datassentials.com), found that truffle and aïoli sauces and flavors are increasing in popularity for seafood preparation at restaurants. Asian and Latin-influenced flavors and ingredients are most popular for seafood dishes.

74.3 Sustainable Seafood

The depletion of many species of fish has forced chefs to rewrite their menus for years now – 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.

Chilean sea bass's rise and fall has been recent. Originally called the Patagonian toothfish, there was virtually no consumer demand before a marketer renamed it Chilean sea bass. Sales took off in the early 1990s. Chefs found that it was really easy to work with and full of flavor. By the late 1990s, however, fish stocks had declined so much that a campaign to protect it, called Take a Pass on Chilean Sea Bass, by the National Environmental Trust (www.envirotrust.org), launched in 2002, calling upon restaurants to stop serving it. Today much of what's sold as Chilean sea bass is, in fact, other fish entirely.

According to a study directed by Prof. Boris Worm, Ph.D., at Dalhousie University (Halifax, Nova Scotia), 29% of fish and shellfish populations worldwide have 'collapsed.' Among the species that have collapsed in North American regions: Atlantic sturgeon in Delaware Bay and Chesapeake Bay; Atlantic salmon in Massachusetts Bay; Chinook salmon from California to British Columbia, and striped bass from the St. John's River in the Outer Bay of Fundy. If the declines continue, there could be little sustainable seafood available by 2048, asserts the report.

Many chefs today are joining groups such as the Seafood Choices Alliance (www.seafoodchoices.org) and Chef's Collaborative (www.chefscollaborative.org), both of which work to educate fishers, chefs, and retailers on making responsible purchasing decisions. Compass Group, the largest foodservice company in the U.S., for example, has a sustainable seafood policy to reduce the use of red-listed species – those that scientists believe are in most danger of collapse – and, wherever possible, to replace those products made from a threatened type of fish with sustainable seafood options comparable in price and flavor.

One major trend toward sustainable seafood is the use of farm-raised fish. Though catfish, tilapia, salmon, and shrimp have dominated aquaculture for years now, a host of other species are now being farmed, too. Some already have attained the kind of flavor and quality that approaches their wild-caught counterparts, including oysters, caviar, trout, striped bass, and barramundi. Other farm-raised introductions to the market include tuna, halibut, snapper, turbot, and cod.

Another approach to sustainability is to offer some fish seasonally. Chefs are avoiding spawning times, for example, to protect juvenile fish.

While necessary, fishing restrictions related to sustainability contribute to shortages. Combined with an aging workforce that is not getting replenished by younger fishermen and continuing disasters that have impeded Gulf coast fishing in recent years, demand for quality domestic seafood may soon outpace supply.

"While many large seafood restaurant chains harvest from international waters, smaller operators prefer to lure customers with local seafood offerings. Without access to those supplies at reasonable prices, many foresee a time when they will be forced to purchase seafood from sources outside the United States."

Nation's Restaurant News, 4/12/12

74.4 Labeling

A seafood labeling investigation, reported in February 2013 by Oceana (www.oceana.org), found that 33% of more than 1,200 seafood samples purchased in restaurants, supermarkets, and sushi counters was mislabeled. DNA testing was used to confirm species identification.

Of the most commonly collected fish types, samples sold as snapper and tuna had the highest mislabeling rates (87% and 59%, respectively). Between one-third and one-fifth of the halibut, grouper, cod and Chilean sea bass tested were mislabeled.

At sushi restaurants, 74% had at least one sample mislabeled. Thirty-eight percent (38%) of restaurants had at least one problem sample, as did 18% of grocery stores.

Seafood goes through many hands in the supply change; substitution is easy and often difficult to track. Eighty-four percent (84%) of seafood consumed in the United States is imported, according to the National Fisheries Institute (www.aboutseafood.com). Selling one kind of fish under another name is illegal under FDA regulations, but there is little federal oversight.

According to *The New York Times*, much of the mislabeling occurs at sea or where distributors cut up a fish hundreds to thousands of miles away, making a filet's provenance hard to verify. Restaurants are often the unknowing victims of such substitution.

"Restaurants would be very concerned that a high percentage of fish are not what they had ordered. Unless you're very sophisticated, you may not be able to tell the difference between certain species of fish when you receive them."

Andrew Moesel, Spokesman
New York State Restaurant Association
The New York Times, 12/11/12

The Marine Stewardship Council (MSC, www.msc.org) has developed the Chain Of Custody certification program for restaurants. To be certified, restaurants must rigorously screen suppliers and require that they document all seafood. Suppliers are audited by a third party inspector to ensure that the seafood purchased is actually what it is declared to be. DNA testing is also conducted to verify certain species of fish. A list of certified restaurants in the United States is posted online at www.msc.org/where-to-buy/dining-out/usa.

75

SNACKING

75.1 Overview

Findings from *Snacking Occasion Consumer Trend Report*, a 2012 report by Technomic (www.technomic.com), show increased snacking among consumers, compared to 2010. Of the 1,500 respondents in the report's poll, 48% said they snack at least twice a day, compared to 25% who reported snacking twice daily in 2010.

Snack consumption is distributed by age demographic as follows:

- 18-to-24: 28.2%
- 25-to-34: 25.5%
- 34-to-44: 20.1%
- 45-to-54: 16.8%
- 55 and older: 9.4%

While candies, chips and other sweet, salty or savory treats are most often thought of as typical for snacking, fresh whole foods like fruits are found to be the most popular snack food of all. Fresh fruit is the top snack food consumed in the United States and also the fastest growing, according to *Snacking in America*, a 2012 report by The NPD Group (www.npd.com).

Fresh fruits are consumed in 10 more snack occasions a year than chocolate – the second-most popular snack food – and 25 more occasions a year than the third-most popular snack item, potato chips.

"Among opportunities this trend presents to producers and produce retailers to market and merchandise fruit around ... usage can be expanded with packaging innovation and promotions for on-the-go activities when it's least likely to be consumed."

Darren Seifer, Analyst
The NPD Group, 1/8/12

In spite of the popularity of fruits as snack food, the snack sector is driven primarily by prepared and packaged items.

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.

> **"We've been talking to our customers a lot about snacks during the last five years because we've seen consumer behavior change so much. They've redefined what a snack is. People used to think a snack was chips, cookies, or crackers. Now snacks are beverages, mini-meals, or three items on a tray."**
>
> Kim Holman
> Director of Marketing
> Wixon
> *Food Processing*, 4/5/12

75.2 Market Assessment

The following is a 2012 assessment of snack foods provided by the National Confectioners Association (www.candyusa.com):

- U.S. sweet and snack sales are an $80 billion market.
- Sweets and snack foods account for 10% of total grocery store sales.
- Thirty percent (30%) of sweet and snack sales are attributed to products that came out in the last two years (i.e., 2011 and 2012). During that period, 4,600 new sweet and snack food products were introduced.

Of new product launches in 2011, 1,563 new confectionery products debuted, according to Datamonitor's (www.datamonitor.com) Product Launch Analytics online database of new U.S. products SKUs. There were 895 chocolate rollouts, 512 sugar confectionery (non-chocolate) treats, and 156 gum products.

Other snacks categories saw 3,231 products launched. Cookies accounted for 634, nuts and seeds (461), crackers (287), potato chips (382), cereal bars (357), and popcorn (114). Other savory snacks (pretzels, tortilla chips, puffed snacks, fruit snacks, meat snacks, etc.) totaled 844, and processed snacks (tortilla chips, corn chips, other non-potato chips) came in at 152.

75.3 Snack Food Trends

The following were the top snack trends in 2012 (source: National Confectioners Association):

Shareable Affordable Sweets

- Share Bags (stand up bags) to share with family and friends, and informally gift to others are becoming more widely available at retail.

Perfect Pairings – Sweet & Salty

- There are a variety of new products with the sweet and salty flavor coupling, from milk chocolate-covered raisins and peanuts to cinnamon sugar popcorn, chocolate-covered pretzels, potato chips and bars.

Flavors Beyond Borders

- Snacks with Middle Eastern, Asian, and Mediterranean-influenced flavors are popping up on store shelves. A number of snacks coming to market are based on chickpeas, lentils, and seaweed.

Mango Mania

- There is a new generation of tropical fruit flavors, with mango leading the way. Pairing mango with pineapple, orange, coconut, and strawberry to create new confectionery flavors is gaining popularity, but tropical fruit is also making its way to the snack aisle, from freeze dried fruits to mouth-watering salsas.

Packing a Healthy Punch

- Healthy snacking continues to gain momentum. Nutritional health bars are the top growing snack item, according to Symphony IRI (www.symphonyiri.com). Many new snacks provide a variety of health attributes, whether gluten-free, all natural, made from whole grains, or including B vitamins and antioxidants.

76

TAKEOUT & DELIVERY

76.1 Market Assessment

According to The NPD Group (www.npd.com), the average U.S. consumer purchases 127 meals annually at restaurants for consumption elsewhere. For comparison, the average customer buys 81 meals for consumption in a restaurant.

Restaurant takeout and delivery sales are estimated as follows:

	Sales	Percent of Total Sales
• Quick-service restaurants:	$115 billion	70%
• Full-service restaurants:	$ 20 billion	10%

76.2 Takeout and The American Lifestyle

In a 2012 survey by the National Restaurant Association (www.restaurant.org), 33% of adults said purchasing takeout from restaurants is an important part of they 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%

In the 2012 survey, the percentages of adults who say they are likely to use various off-premise options are as follows:

	All	Frequent Customers		
	Adults	FSR	QSR	OPD
• Delivery from a full-service restaurant:	55%	58%	65%	68%
• Delivery from a quick-service restaurant:	52%	54%	61%	68%
• Takeout from a full-service restaurant:	51%	53%	59%	69%

76.3 The Takeout and Delivery Customer

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

	1 or 2	3 to 9	10 or more
• 18-to-24:	10%	49%	42%
• 25-to-34:	26%	47%	27%
• 35-to-44:	28%	52%	20%
• 45 and older:	29%	52%	19%

Consumers' preferences in takeout and delivery are as follows (source: Technomic; percentage of respondents):

• Drive-thru:	49%
• Home delivery:	45%
• Designated takeout parking spaces:	45%
• Dedicated takeout staff:	37%
• Online ordering:	35%
• Office delivery:	34%
• Curbside delivery:	31%

Takeout sales do not appear to significantly cannibalize dining room traffic. Technomic found that 60% of consumers who recently purchased takeout said if they had not done so on that occasion, they would most likely have made food at home and not purchased from a foodservice operator.

76.4 Pizza Delivery

Delivery services are credited as being a significant factor in the growth of major pizza chains. Seventy percent (70%) of Domino Pizza's business is delivery; the chain's annual sales are $3.56 billion. Many small independent pizza restaurants, however, do not offer delivery services.

"There is a reason that not all pizza places deliver: It isn't easy."

Tim McIntyre, Vice President
Domino's Pizza
USA Today, 1/17/12

76.5 Quick-Service Carryout and Delivery

According to Sandelman & Associates (www.sandelman.com), drive-thru accounts for 41% of all fast-food occasions, carryout ordered inside the restaurant comprises 23%, and delivery comprises 6% for quick-service restaurants (QSRs). The other 30% are dine-in meals. By daypart, the percentage of customers who used carryout services on their last QSR purchase is as follows:

• Breakfast:	5%
• Lunch:	33%
• Dinner:	58%
• Snacks:	4%

Virtually all quick-service restaurants offer carryout; an increasing number are offering delivery service.

Burger King has tested home delivery at select locations in Maryland and Virginia. The operators of more than 300 franchised Subway restaurants in Washington, D.C., two McDonald's locations in New York City, and a San Francisco franchisee of Johnny Rockets have also tested or offer home delivery service.

76.6 Takeout At Full-Service Chains

According to the National Restaurant Association (www.restaurant.org), nine in 10 family- and casual-dining operators and three-fourths of fine-dining operators offer takeout service. Thirty-seven percent (37%) of American adults have used curbside takeout from a full-service restaurant. Most full-service restaurants do not offer delivery. Among those that do, 40% find it to account for an increasing share of sales.

More than half of adults surveyed by the National Restaurant Association said they would be likely to use a curbside takeout option if offered by their favorite table-service restaurant. Fifty-eight percent (58%) of adult consumers said they would be likely to order food for delivery from their favorite table-service restaurant if provided with the option.

A recent survey by Technomic found 54% of respondents had ordered a meal from a full-service restaurant for off-premise consumption at least once during the preceding week; 17% had ordered twice. Nearly one in 10 had used a full-service restaurant as their meal source at least three times during the prior seven days.

76.7 Takeout for Offices and Elsewhere

Americans are increasingly eating takeout meals at work. According to The NPD Group, the average worker purchases 27 meals annually for consumption at the workplace, a 17% increase from 10 years ago.

Takeout food is not always for consumption at the office or home; over two-thirds of American consumers, at least occasionally, eat in their car. According to a survey by Kelton Research (www.keltonresearch.com), when asked how often they eat in their car, drivers responded as follows:

- At least once a day: 9%
- Once or twice a week: 14%
- Once a month: 14%
- Never: 31%
- Other response: 32%

76.8 Takeout Packaging

Packaging for takeout is important for environmental considerations as well as to maintain product integrity. In a survey by the National Restaurant Association, the following percentages of restaurant operators said they planned to upgrade takeout packaging in 2013:

	Better Quality	More Environmentally-Friendly
• Fine-dining:	47%	62%
• Casual-dining:	57%	57%
• Family-dining:	57%	47%
• Fast-casual:	75%	40%
• Quick-service:	71%	53%

Approximately 20% of restaurants said they planned to include information with takeout orders on proper food-handling techniques.

77

VALUE-FOCUSED DINING

77.1 Overview

Many consumers cut back on their dining out occasions during the economic downturn. Now, as the economy is recovering, consumers are beginning to dine out more but many have a new emphasis on value in their restaurant experiences.

> **"Budget-conscious consumers continue to expect the best value for their money. In fact, nine out of 10 operators across all segments said their customers are more value-conscious than they were two years ago."**
>
> *2013 Restaurant Industry Forecast*
> National Restaurant Association, 1/13

77.2 Trading Down

Based on the analysis of more than 250 million checks at full-service restaurants in 2012, GuestMetrics (www.guestmetrics.com) found that the number of entrèes ordered declined by 1.5%, while orders of appetizers and sides grew by 2.8%. The average price of an entrèe was $11.56 in 2012, compared with $5.57 for appetizers and sides, indicating downward pressure on average checks. The number of wine bottles ordered in restaurants and bars dropped 13% between 2011 and 2012; the number of glasses of wine rose by 4%. Dessert sales rose by 2.3%.

"Restaurant customers traded down in 2012 – from entrèes down to appetizers, from bottles of wine down to glasses, and from expensive entrèes down to cheaper ones."

Bill Pecoriello, CEO
GuestMetrics
Nation's Restaurant News, 1/22/13

In a 2012 survey of consumers who visit restaurants at least once per month, Consumer Edge Insight (www.consumeredgeinsight.com) found, not surprisingly, that consumers overall were cutting back on dining out and spending less in restaurants. The types of cutbacks were as follows (percentage of respondents):

- Traded down to less expensive dining options: 60%
- Order less expensive items on restaurant menus: 55%
- Take advantage of dining discounts or promotions: 51%

Among respondents who ate at quick-service restaurants more often in 2012, 26% said they ate at fine-dining restaurants less often, 23% ate less often at casual-dining concepts, and 15% cut back on fast-casual dining.

"Many consumers are trading down from fine-dining for economic reasons. But rather than taking the smaller step down to casual-dining, a lot are trading down to quick-service or pizza restaurants."

David Decker, President
Consumer Edge Insight
Nation's Restaurant News, 1/22/13

77.3 Promotions

Roughly one-half of meals purchased at quick-service restaurants are deal-driven. According to The NPD Group, the percentages of deal-driven traffic in 2012 and, for comparison, in 2010, are as follows:

	2010	2012
• Combo meals:	20%	19%
• Coupons:	14%	17%
• 99¢-$1 meals:	18%	16%

Combo meals, a concept introduced in the 1990s, peaked in popularity in 2008 when about nine billion combo meals were sold. Approximately eight million combo meals were sold in 2012. *Understanding Combo Meal Purchasing Behavior*, a June 2012 report by The NPD Group, attributes the declining popularity, in part, to consumers' interest in menu items that are not part of combo options. Consumers say their interest in combo meals would be enhanced with swappable combo-meal components, as follows:

	Would Change Item	Would Not Change Item	Would Not Include Item
• Main dish:	31%	63%	6%
• Side dish:	58%	36%	6%
• Beverage:	45%	44%	11%
• Dessert:	45%	30%	25%

"While consumers like that combo meals are easy to order, a good value, and a complete meal, many said they would make changes to the contents of the meals if given the chance."

The NPD Group, 6/12

77.4 Off-Peak Specials

In *The 2012 National Household Survey*, by the National Restaurant Association, 79% of adults said they would consider dining out more often if menu prices were lower during off-peak times.

Restaurants have responded to consumer interest in off-peak dining by increasing promotions. *The 2012 Restaurant Trends Survey*, by the National Restaurant Association, found restaurant operators anticipate that off-peak dining at reduced prices will become more popular in their segment as follows:

- Fine-dining: 58%
- Casual-dining: 61%
- Family-dining: 59%
- Fast-casual: 39%
- Quick-service: 33%

PART VIII: BEVERAGE TRENDS & ANALYSES

78

BEVERAGE CONSUMPTION & SPENDING

78.1 Beverage Consumption

According to Beverage Marketing Corporation (www.beveragemarketing.com), the average person consumes 165.0 gallons of beverages annually. Consumption by beverage category is as follows:

- Carbonated soft drinks: 44.7 gallons
- Bottled water: 28.3 gallons
- Beer: 20.8 gallons
- Milk: 20.4 gallons
- Coffee: 18.5 gallons
- Fruit beverages: 11.5 gallons
- Tea: 10.3 gallons
- Sports beverages: 4.0 gallons
- Wine: 2.3 gallons
- Distilled spirits: 1.5 gallons
- Value-added water: 1.5 gallons
- Energy drinks: 1.2 gallons

People also consume approximately 25.0 gallons of tap water annually.

78.2 Beverage Spending

Consumers in the U.S. spend more than $300 billion annually on beverage purchases. This includes alcoholic and nonalcoholic beverages, consumed both on-premise and at home.

According to the Distilled Spirits Council (DISCUS, www.discus.org), alcoholic beverage supplier gross revenue in 2012 was $62.14 billion, distributed as follows (change from previous year in parenthesis):

- Beer: $30.32 billion (3.7%)
- Spirits: $21.29 billion (4.6%)
- Wine: $10.53 billion (3.3%)

According to The Beverage Information Group (www.beveragenet.net), annual on-premise alcoholic beverage sales are approximately $110 billion.

The American Beverage Association (www.ameribev.org) estimates that Americans spend roughly $100 billion annually on refreshment and nonalcoholic beverages. This category includes carbonated soft drinks, bottled water, juice and juice drinks, ready-to-drink tea and coffee, sports drinks, and energy drinks.

Consumers spend between $12 billion and $15 billion annually on hot coffee and specialty coffee beverages at coffeehouses and quick-service restaurants, according to Technomic (www.technomic.com) and Business Trends Analysts (www.bta-ler.com).

78.3 Alcoholic Beverages

Among the 220 million legal drinking-age consumers in the United States (70% of the total population), about 100 million are identified as social drinkers.

According to the National Institutes of Health (www.nih.gov), when light drinkers – those who consume 12 or fewer drinks a year – are combined with nondrinkers, they represent nearly 49% of the U.S. population. Other estimates put the percentage as low as 25%.

The Gallup Organization (www.gallup.com) has conducted consumer polls related to alcohol and drinking since 1939. (Prohibition ended in 1933.) After fluctuating somewhat over the past several decades, the percentage of adults who drink alcoholic beverages has held relatively constant over the past several years. The following are results of various Gallup Polls:

	Drink	Total Abstainer
• 1939:	58%	42%
• 1949:	58%	42%
• 1959:	61%	39%
• 1969:	64%	36%
• 1979:	69%	31%
• 1989:	62%-56%*	38%-44%*
• 1999:	64%	36%
• 2000:	64%	36%
• 2001:	62%	38%
• 2002:	66%	34%
• 2003:	62%	38%
• 2004:	62%	38%
• 2005:	63%	37%
• 2006:	64%	36%
• 2007:	64%	36%
• 2008:	62%	38%
• 2009:	64%	36%
• 2010:	67%	33%
• 2011:	64%	35%
• 2012:	66%	34%

* 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 (2012), the following are the beverages most frequently consumed (source: Gallup):

- Beer: 39%
- Wine: 35%
- Spirits: 22%

The following is the distribution of those who drink alcoholic beverages by weekly consumption (source: Gallup):

- Less than one drink: 34%
- 1-to-7 drinks: 52%
- 8 or more drinks: 12%

Harris Poll (www.harrisinteractive.com) reports consumption of alcoholic beverages by adults in 2011 (most recent data available) as follows:

	Daily	At least once per Week	At least once a month	Less than once a month	Never
Gender					
• Female:	3%	21%	21%	33%	24%
• Male:	7%	38%	18%	24%	20%
Age					
• 21-to-34:	3%	33%	24%	21%	23%
• 35-to-46:	3%	30%	20%	32%	18%
• 47-to-65:	5%	29%	17%	31%	22%
• 66 and older:	11%	26%	18%	29%	27%
All	5%	29%	20%	29%	22%

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

	All	Men	Women
• Beer:	63%	75%	50%
• Domestic wine:	54%	45%	63%
• Vodka:	41%	40%	43%
• Rum:	34%	34%	35%
• Imported wine:	28%	26%	31%
• Tequila:	28%	27%	30%
• Canadian/Irish/other whiskey:	20%	25%	14%
• Champagne:	17%	13%	23%
• Cordials and liqueurs:	17%	14%	20%
• Bourbon:	15%	23%	6%
• Gin:	14%	15%	13%
• Scotch:	11%	17%	4%
• Cognac:	8%	11%	4%

• Brandy:	7%	10%	5%
• Other:	6%	6%	7%

According to *What America Drinks*, by Environ International Corporation (www.environcorp.com), the percentages of various demographics that consume alcoholic beverages and average daily consumption are as follows:

	Consumers	Avg. Consumption
• Male, ages 19-to-49:	34.1%	14.7 fl. oz.
• Male, ages 50 and older:	31.5%	9.1 fl. oz.
• Female, ages 19-to-49:	20.6%	4.5 fl. oz.
• Female, ages 50 and older:	16.0%	2.3 fl. oz.

Note: Percentages indicate those who consumed a beverage on the day of survey or day of recall.

Rankings of per capita consumption of the three beverage alcohol categories are summarized as follows (Source: National Institute of Health. Note: #1 ranking indicates state has highest per capita consumption for each beverage):

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

28	Nebraska:	#11	#40	#34
29 (tie)	Connecticut:	#49	# 7	#15
29 (tie)	California:	#42	#10	#31
31	Pennsylvania:	# 9	#33	#47
32 (tie)	Washington:	#45	#13	#28
32 (tie)	Texas:	# 9	#33	#47
34	Mississippi:	#14	#50	#35
35	Michigan:	#35	#29	#25
36 (tie)	Georgia:	#33	#29	#30
36 (tie)	Maryland:	#47	#24	#15
38	Iowa:	#17	#45	#42
39 (tie)	Virginia:	#37	#21	#42
39 (tie)	Ohio:	#20	#37	#49
41	North Carolina:	#30	#27	#44
42 (tie)	Indiana:	#40	#38	#32
42 (tie)	Tennessee:	#26	#40	#44
44 (tie)	New York:	#49	#16	#36
44 (tie)	Oklahoma:	#42	#49	#19
46	Alabama:	#34	#39	#44
47	Kansas:	#36	#42	#38
48	Arkansas:	#42	#48	#38
49	Kentucky:	#46	#45	#38
50	West Virginia:	#29	#51	#51
51	Utah:	#51	#45	#50

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

There are two main drivers in the overall beverage alcohol market, according to Beverage Marketing Corporation: the economy and the weather. When gross domestic product goes up, people drink more beer, distilled spirits, and wine. When weather is bad, people drink more wine and spirits, but less beer.

One trend in the alcoholic beverage sector is American-made beverages entering the global marketplace, with many considered to be among the finest in the world. This has not always been the case. Just a quarter century ago, for example, only imported wine (generally of French vintage) was thought to be of great quality. Now, American wines regularly win international awards and appear on tables in fine restaurants. And American beer and bourbon are closing their respective gaps in the beverage world.

Still, the U.S. market continues to see a strong presence of imported brands. Overseas suppliers generally eclipse domestic producers in offering new premium brands. According to Beverage Marketing Corporation, 40% of spirits in the U.S. market are imports, as are 26% of wines and 14% of beer.

78.4 Nonalcoholic Beverages

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

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

Notes: Percentages indicate those who consumed a beverage on the day of survey or day of recall.
CSD = carbonated soft drinks. Juice includes fruit and vegetable juices but not fruit drinks. Milk includes only plain milk, not flavored milk.

According to Beverage Marketing Corporation, the overall U.S. liquid refreshment beverage market, which includes all nonalcoholic beverages except tap water, increased 0.9% in 2011. This followed an increase of 1.3% in 2010 and declines of 2.8% and 2.1%, respectively, in 2009 and 2008.

79

BEER

79.1 Market Assessment

The Brewers Association (www.beertown.org) estimates U.S. beer sales in 2011 at $96 billion, a 1% decline from a year prior.

According to Beverage Marketing Corporation (www.beveragemarketing.com), U.S. beer consumption has been as follows:

- 2007: 206.8 million barrels
- 2008: 207.6 million barrels
- 2009: 203.1 million barrels
- 2010: 201.3 million barrels
- 2011: 198.3 million barrels

Note: one case = 2.25 gallons; one barrel = 31.0 gallons (117.3 liters); one barrel = 13.7 cases

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"Between 2007 and 2011, beer volume fell about 4.1%. Part of that can, of course, be attributed to the economic downturn. But with growth returning to the other alcohol segments much sooner, when does that explanation stop working?"

Beverage World, 5/12

Beer supplier gross revenue has been as follows (source: Distilled Spirits Council of the United States [www.discus.org]; change from previous year in parenthesis):

- 2003: $24.8 billion (2.9%)
- 2004: $25.6 billion (3.2%)
- 2005: $25.6 billion (no change)
- 2006: $26.3 billion (2.7%)
- 2007: $27.5 billion (4.6%)
- 2008: $28.5 billion (3.6%)
- 2009: $28.8 billion (1.1%)
- 2010: $28.6 billion (-0.7%)
- 2011: $30.32 billion (3.7%)

According to Symphony IRI Group (www.symphonyiri.com), annual beer sales in supermarkets, drug stores, and mass merchandisers (excluding Walmart) are $9.7 billion.

According to *Beer Handbook 2012*, published by the Beverage Information Group (www.bevinfogroup.com), the U.S. beer market was distributed by category in 2011 as follows (change from previous year in parenthesis):

- Light: 52.1% (-2.6%)
- Premium & super premium: 12.8% (-4.7%)
- Popular: 7.9% (-2.4%)
- Craft: 6.4% (14.1%)
- Ice: 3.6% (0.5%)
- Malt liquor: 2.4% (-3.4%)
- Flavored malt beverages: 1.6% (3.8%)

Domestic beer accounts for 86.8% of beer consumption.

It is estimated that more than 3,500 brands of beer – supplied by more than 2,000 brewers and importers – are available in the U.S.

According to the Brewers Association, 2,196 breweries were in operation in the U.S. as of July 2012, distributed as follows:

- Large breweries: 22
- Regional non-craft breweries: 29
- Regional craft breweries: 81
- Microbreweries: 992
- Brewpubs: 1,072

According to the Beer Institute (www.beerinstitute.org), the package mix of beer sold is as follows:

- Cans: 48%
- One way bottles: 42%
- Draught: 9%
- Refills/plastic/other: 1%

79.2 Market Leaders

According to *Beer Handbook 2012*, beer marketshare is distributed as follows:

- Anheuser-Busch/InBev: 49%
- MillerCoors: 30%
- Crown Imports: 5%
- Heineken USA: 4%
- Pabst Brewing Company: 3%
- Others: 8%

79.3 Top Domestic Beer Brands

According to The Beverage Information Group, the leading domestic beer brands ranked by sales in 2011 are as follows (change from previous year in parenthesis):

- Bud Light (Anheuser-Busch/InBev): 538.0 million cases (-1.0%)
- Budweiser (Anheuser-Busch/InBev): 242.0 million cases (-4.3%)
- Coors Light (MillerCoors): 253.9 million cases (1.0%)
- Miller Lite (MillerCoors): 211.0 million cases (-4.0%)
- Natural Light (Anheuser-Busch/InBev): 117.4 million cases (-7.6%)
- Busch Light (Anheuser-Busch/InBev): 91.3 million cases (-3.4%)
- Busch (Anheuser-Busch/InBev): 81.1 million cases (-2.3%)
- Miller High Life (MillerCoors): 65.0 million cases (-6.5%)
- Keystone Light (MillerCoors): 62.8 million cases (-4.1%)
- Michelob Ultra (Anheuser-Busch/InBev): 43.8 million cases (0.5%)

* cases are 2.25 gallons

79.4 Demographics

The following is a demographic profile of the beer consumer (source: *Behavioral Tracking Study*, Miller Brewing Company):

Gender

- Male: 77%
- Female: 23%

Age

- 21-to-27: 23%
- 28-to-34: 18%
- 35-to-44: 26%
- Age 45 and older: 34%

Income

- Less than $30,000: 32%
- $40,000 to $49,999: 23%
- More than $50,000: 45%

Ethnicity

- African-American: 12%
- Caucasian: 74%
- Hispanic: 11%
- Other: 3%

There is a significant gender variation in where beer is purchased. The following is the gender profile of beer purchases at various outlets:

		Male	Female
•	On-premise:	78%	22%
•	Convenience stores:	74%	26%
•	Supermarket:	68%	32%
•	Liquor store:	74%	26%

Surveys by International Demographics (www.themediaaudit.com) found that between 2008 and 2012 there was a 5.4% increase in the percentage of women who frequently consume beer. Frequent beer consumption is defined by International Demographics as having consumed beer on six or more occasions in the past two weeks; 5.9% of U.S. adults are classified in this category. Among frequent beer drinkers, 19.6% are female, compared to 18.6% in 2008.

Among top markets for females who frequently drink beer are Greensboro, North Carolina, where 7.2% of the female population frequently consumes beer, followed by Akron, Ohio (5.9%), Boise, Idaho (4.7%), Allentown-Bethlehem, Pennsylvania (4.6%), and Eugene, Oregon (4.3%).

79.5 Craft Beer

Craft beers, which are defined as those with annual production under two million barrels, are typically made by small, independent breweries and feature traditional ingredients such as malted barley. In some cases, nontraditional ingredients such as chocolate or raspberries are added for distinctiveness.

Small craft breweries have flourished in the U.S. in recent years. The trend began in 1979 when federal legislation repealed restrictions on the home-brewing of small quantities of beer. At that time there were 42 breweries in the U.S.; as of July 2012 there were 2,126, according to the Brewers Association.

According to the Brewers Association, retail sales of craft beer in 2011 were $8.7 billion, with 11.46 million barrels sold, increases of 15% and 13%, respectively, over the previous year. The craft brewing sales share in 2011 was 5.7% by volume and 9.1% by dollars.

According to Beverage Marketing Corporation and *Beverage World*, the leading craft brewers in 2011 were as follows:

- Boston Beer Co. (Boston, MA): 2.50 million cases
- Sierra Nevada Brewing Co. (Chico, CA): 860,000 cases
- New Belgium Brewing Co. (Fort Collins, CO): 713,000 cases
- The Gambrinus Co. (San Antonio, TX): 450,000 cases
- Deschutes Brewery (Bend, OR): 220,000 cases
- Matt Brewing Co. (Utica, NY): 190,000 cases
- Bell's Brewery (Galesburg, MI): 181,000 cases
- Harpoon Brewery (Boston, MA): 175,000 cases
- Lagunitas Brewing Co. (Petalurna, CA): 160,000 cases
- Boulevard Brewing Co. (Kansas City, MO): 157,000 cases

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.

79.6 Imported Beer

By volume, imported beer consumption increased 1.9% in 2011, to 367.6 million cases. This followed a 0.9% increase in 2010 and a 6.9% decline in 2009.

According to The Beverage Information Group, the leading imported beer brands in 2011 were as follows (change from previous year in parenthesis):

- Corona Extra (Crown Imports): 98.7 million cases (0.5%)
- Heinekin (Heineken USA): 54.4 million cases (-2.9%)
- Modelo Especial (Crown Imports): 35.2 million cases (14.0%)
- Dos Equis (Heineken USA): 16.1 million cases (15.0%)
- Tecate (Heineken USA): 16.1 million cases (-9.0%)
- Stella Artois (Anheuser-Busch/InBev): 14.5 million cases (21.8%)
- Corona Light (Crown Imports): 13.1 million cases (0.6%)
- Guinness Stout (Diageo-Guinness): 12.4 million cases (4.0%)
- Labatt Blue (North American Breweries): 10.4 million cases (-4.1%)
- Newcastle Brown Ale (Heineken USA): 7.0 million cases (no change)

* cases are 2.25 gallons

79.7 Flavored Malt Beverages

Flavored malt beverage consumption increased 11.1% to 5.0 million barrels in 2011, according to Beverage Marketing Corporation. This followed a 7.1% increase in 2010.

"There's a bit of a mini-renaissance going on with flavored malt beverages, thanks to innovation and a strong marketing push by Mike's Lemonade."

Beverage World, 5/12

79.8 On-Premise

While on-premise sales represent only 25% of volume consumption, they account for 50% of total dollar spending.

According to the *Behavioral Tracking Study*, by Miller Brewing Company, on-premise beer consumption is distributed as follows:

- Bar/tavern/pub: 62%
- Restaurant: 20%
- Hotel: 7%
- Concessions: 6%
- Country club: 3%
- Bowling center: 2%

According to The NPD Group (www.npd.com), beer accounts for 54% of alcoholic beverages served in bars and 50% of servings at casual-dining restaurants.

80

DISTILLED SPIRITS

80.1 Market Assessment

The Distilled Spirits Council of the United States (DISCUS, www.discus.org) provides the following assessment of the U.S. market for distilled spirits:

- Overall, U.S. supplier sales in 2012 grew a solid 3.0% in volume to 202 million cases. Supplier revenues grew 4.5% to $21.3 billion as consumers continued to gravitate to higher-end premium and super premium product choices. Meanwhile, the distilled spirits industry grew its marketshare of sales for the third straight year to 34.3%, taking share from both beer and wine.
- Since 2002, 16 states have adopted Sunday sales of distilled spirits, for a total of 38 nationally. This is worth $260 million in new annual sales. Also since 2002, 17 more states have passed legislation to allow distilled spirits “tastings” at liquor stores, for a total of 44 states that allow some form of tasting.
- While 2003-2012 supplier sales of value-priced products have grown from $3.75 billion to $4.08 billion, a 24.5% rate of growth, super premium products have grown from $1.48 billion to $3.90 billion, a 163% rate of growth.
- 2012 was the third-straight record year of export growth, with exports reaching $1.5 billion. American whiskeys, which represent nearly 70% of exports, had solid gains in most traditional markets while growing rapidly in emerging markets. U.S. distilled spirits exports now exceed wine exports by nearly a quarter of a billion dollars and are more than triple beer exports.
- Over 40% of all spirits products in the U.S. have a flavor component beyond the traditional category – as many as 220 different expressions, from citrus to wasabi.
- Vodka, the largest spirits category, saw volumes increase 4.0% to 65 million 9-liter cases, with super premium vodkas up 10.0%. Vodka supplier revenues grew to $5.5 billion.
- Bourbon and Tennessee whiskey volumes, the largest whiskey category, climbed 5.2%, with super premium products up 12.4%.
- Irish Whiskey continued its rapid growth with volumes increasing 22.5%.
- Single malt Scotch grew at double digit rates in 2012, with volumes up 13.0%.

"Regulatory modernization over the course of the last decade, with the steady repeal of prohibition-era Blue Laws, has paid real revenue dividends for the distilled spirits industry. Reasonable access and modern shopping environments have certainly contributed to consumer preferences for premium distilled spirits product choices. When added to a steady fascination with cocktail trends and a diverse array of product innovations, the industry has charted a course for steady, sustainable growth."

Peter Cressy, President
DISCUS, 2/6/13

Shipments and revenue of distilled spirits in 2012, by category, were as follows (change from previous year in parenthesis):

	Volume	**Revenue**
• Total:	201.88 million cases* (3.0%)	$21.29 billion (4.5%)
• Whiskey:	49.66 million cases (1.4%)	$ 6.37 billion (6.8%)
• Vodka:	65.18 million cases (6.1%)	$ 5.47 billion (5.1%)
• Rum:	25.50 million cases (1.5%)	$ 2.32 billion (1.9%)
• Tequila:	12.33 million cases (2.9%)	$ 1.88 billion (4.6%)
• Gin:	10.73 million cases (1.5%)	$ 873 million (2.7%)
• Brandy & Cognac:	10.99 million cases (1.2%)	$ 1.52 billion (3.9%)
• Cordials:	21.24 million cases (4.7%)	$ 2.52 billion (3.1%)
• Cocktails:	6.26 million cases (-6.4%)	$ 348 million (-7.0%)

Shipments and revenue of distilled spirits in 2012, by tier, were as follows (change from previous year in parenthesis):

	Volume	**Revenue**
• Total:	201.88 million cases* (3.0%)	$21.29 billion (4.5%)
• Value tier:	76.88 million cases (1.8%)	$ 4.08 billion (1.4%)
• Premium tier:	72.81 million cases (2.1%)	$ 7.31 billion (1.8%)
• High-end premium tier:	36.30 million cases (4.8%)	$ 6.00 billion (6.3%)
• Super premium tier:	15.89 million cases (8.9%)	$ 3.90 billion (10.8%)

* 9-liter case equivalents

80.2 Major Brands

By category, the following are major distilled spirits brands (source: DISCUS):

Whiskey: Blends, Bourbons, Canadian

- Value: Black Velvet, Early Times, Lord Calvert
- Premium: Canadian Club, Jim Beam White, Seagram 7, Seagrams VO
- High end premium: Jack Daniels, Jim Beam Black, Makers Mark
- Super premium: Crown Royal, Woodford Reserve

Scotch Whisky

- Value: Passport, VAT 69
- 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, Macallan 10

Irish Whiskey

- High end premium: Bushmills, John Jameson, Michael Collins
- Super premium: Black Bush, Jameson 12

Vodka

- Value: Arrow, Kamchatka, Popov, Tvarski
- Premium: Pinnacle, Skyy, Smirnoff, Sobieski, Svedka
- High end premium: Absolut, Effen, Finlandia, Pearl
- Super premium: Belvedere, Cîroc, Grey Goose, Ultimat, Zyr

Rum

- Value: Arrow, Admiral Nelson, Castillo, Ronrico
- Premium: Bacardi Superior, Capt. Morgan Original, Malibu
- High end premium: Bacardi 8, Cruzan Single Barrel, Mount Gay Black, Tommy Bahama
- Super premium: 10 Cane, Mount Gay XO, Pyrat XO, Ron Zacapa XO

Tequila

- Value: Juarez, Pepe Lopez, Matador
- Premium: José Cuervo Especial, Margaritaville, Sauza Blanco
- High end premium: Antiguo Blanco, Cazadores Blanco, El Jimador, Sauza 100 Años
- Super premium: Don Julio, Herradura, Patrón, Sauza Tres Generacioñes,

Gin

- Value: Gilbey's, Gordon's, Seagrams
- Premium: Beefeater, Bombay Original
- High end premium: Bombay Sapphire, Tanqueray
- Super premium: Plymouth, Tanqueray 10

Brandy & Cognac
- Value: Dekyper Brandy, James Cardin Brandy, Leroux Brandy, Paul Masson Grande Amber
- Premium: Paul Masson VSOP, St. Rémy, Presidente
- High end premium: Courvoisier VS, Hennessey VS, James Cardin VSOP, Martell VS
- Super premium: Rémy Martin VSOP, Hennessey VSOP,

Cordials
- Value: Arrow, Dekuyper, Hiram Walker
- Premium: Baileys, Jägermeister, Kahlua, Southern Comfort
- High end premium: Chambord, Cointreau, Drambuie, Grand Marnier
- Super premium: Grand Marnier Centenaire

Cocktails
- Value: Arrow, Club, Fridays
- Premium: Cuervo Margaritas, Jack Daniels Country Coolers, Kahlua RTDs, Skinny Girl

80.3 Whiskey

Whiskey is an all-encompassing term for any distilled liquor made from a fermented mash of grain. Although all whiskey is distilled in a similar manner, each variety tastes quite different.

Federal regulations specify that whiskey must be produced at less than 190 proof and bottled at not less than 80 proof.

Whiskey is produced in many parts of the world; however, the only significant whiskeys found within the U.S. market are those produced in Scotland, Ireland, Canada, and the United States. Whisky (no 'e') typically refers to Scottish and Canadian whisky, whereas whiskey (with an 'e') is mostly used to denote Irish or American brands.

Whiskey shipments and revenue by tier in 2012 were as follows (source: DISCUS, change from previous year in parenthesis):

	Volume	Revenue
• Total:	49.66 million cases*	$6.37 billion (6.8%)
• Value tier:	16.76 million cases	$ 927 million (-0.4%)
• Premium tier:	13.21 million cases	$1.43 billion (2.4%)
• High-end premium tier:	13.34 million cases	$2.58 billion (9.1%)
• Super premium tier:	6.35 million cases	$1.44 billion (12.8%)

* 9-liter case equivalents

Shipments and revenue by category in 2012 were as follows:

	Volume	Revenue
• Blended whiskey:	5.86 million cases* (0.3%)	$ 327 million (2.9%)
• Bourbon & Tennessee:	16.88 million cases (5.2%)	$2.22 billion (7.3%)
• Canadian:	16.03 million cases (2.1%)	$1.60 billion (3.1%)
• Scotch - blended:	7.64 million cases (-0.4%)	$1.29 billion (3.9%)
• Scotch - single malt:	1.59 million cases (13.0%)	$ 518 million (16.4%)
• Irish:	2.16 million cases (22.5%)	$ 415 million (23.7%)

* 9-liter case equivalents

The following are the leading brands of American bourbon and whiskey in the U.S., ranked by number of cases shipped in 2011 (source: *Liquor Handbook 2012*, published by The Beverage Information Group [www.beveragenet.net], change from previous year in parenthesis):

American Bourbon and Straight Whiskey

- Jack Daniel's: 4.66 million cases* (0.2%)
- Jim Beam: 3.16 million cases (4.3%)
- Evan Williams: 1.30 million cases (1.2%)
- Makers Mark: 1.04 million cases (13.2%)
- Early Times: 570,000 cases (-7.6%)
- Wild Turkey: 555,000 cases (0.9%)
- Ten High: 450,000 cases (no change)
- Old Crow: 435,000 cases (1.4%)
- Ancient Age/AAA: 370,000 cases (-1.3%)
- Heaven Hill: 290,000 cases (-2.0%)

* 9-liter case equivalents

"Bourbon is American like jazz and baseball – most of the interest is in bourbon."

Bobby Fitzgerald, Owner
Lincoln Whiskey Kitchen
Cheers, 9/12

Canadian Whisky

- Crown Royal: 4.04 million cases* (1.0%)
- Black Velvet: 1.89 million cases (5.6%)
- Canadian Mist: 1.62 million cases (-6.1%)
- Canadian Club: 1.18 million cases (0.8%)

- Seagram's V.O.: 945,000 cases (-5.3%)
- Windsor Supreme: 924,000 cases (-3.5%)
- Rich & Rare: 795,000 cases (1.3%)
- Canadian LTD: 705,000 cases (no change)
- Lord Calvert: 438,000 cases (-3.1%)
- Canadian Hunter: 375,000 cases (7.1%)

* 9-liter case equivalents

Irish Whiskey

- Jameson: 1.33 million cases (28.7%)
- Bushmills: 190,000 cases (11.8%)
- Tullamore Dew: 79,000 cases (16.2%)

* 9-liter case equivalents

> **"For years, the big story out of Ireland has been the double-digit increases in the whiskey category. That phenomenal growth shows no signs of slowing down. That momentum has spurred many new developments, including a new major player, distillery expansions, tourism, additional expressions, packaging changes, re-launches, and even a new category of liquid."**
>
> *Beverage Dynamics*, 1/13

Scotch Whisky**

- House of Dewar's: 1.43 million cases*
- Johnnie Walker Black: 756,000 cases
- Johnnie Walker Red: 688,000 cases
- Clan MacGregor: 639,000 cases
- Chivas Regal: 425,000 cases

* 9-liter case equivalents
** 2009 data is most recent available

80.4 Vodka

Vodka shipments in 2012 were as follows (source: DISCUS, change from previous year in parenthesis):

	Volume	Revenue
• Total:	65.18 million cases* (4.0%)	$5.47 billion (5.1%)
• Value tier:	26.56 million cases (1.7%)	$1.08 million (1.4%)
• Premium tier:	19.82 million cases (5.7%)	$1.51 billion (5.4%)
• High-end premium tier:	12.54 million cases (3.5%)	$1.60 billion (4.0%)
• Super premium tier:	6.26 million cases (10.0%)	$1.27 billion (9.5%)

* 9-liter case equivalents

The following are the leading brands of vodka in the U.S., ranked by number of cases shipped in 2011 (source: The Beverage Information Group; change from previous year in parenthesis):

- Smirnoff: 9.66 million cases* (0.6%)
- Absolut: 4.56 million cases (-1.2%)
- Svedka: 3.69 million cases (12.9%)
- Grey Goose: 3.42 million cases (0.6%)
- Skyy: 2.74 million cases (1.5%)
- Pinnacle: 2.70 million cases (92.9%)
- McCormick: 2.20 million cases (-2.8%)
- Barton: 1.93 million cases (4.0%)
- Ketel One: 1.90 million cases (5.2%)
- Skol: 1.80 million cases (7.9%)

* 9-liter case equivalents

Vodka continues to be the most popular liquor in the United States, accounting for more than one out of every five bottles of distilled spirits sold. Lacking aroma, taste, and color, vodka is distilled at a high proof that extracts all of the congeners, or the natural compounds, in the distillate that give the product its taste and aroma. Because vodka is highly neutral, it is possible to make it from a mash of the cheapest and most readily available raw ingredients. Although traditionally made from potatoes, vodka is now generally produced from cereal grains, including rye, wheat, and barley, but mostly corn.

The market for vodka in the U.S. has been one the hottest among all alcoholic beverage segments over the past few years. While the entire distilled beverage category has increased marketshare among alcoholic beverages, sales of vodka have grown even faster.

“Vodka is not only the biggest spirits category, and one of the fastest-growing, it is by far the most exciting, churning with new brands, new products, and perhaps, most importantly, new innovations. Indeed, vodka’s vigor is the chief driver in the U.S. spirits market. Stats indicate the category is seeing a return to premiumization. In terms of innovation, vodka sets the bar high, not only with a palette of flavors encompassing whipped cream, peanut butter & jelly and wedding cake, but also in emerging subcategories such as organic, brightly colored, kosher and low calorie. There’s a vodka to appeal to every consumer – and that’s the category’s biggest appeal.”

Beverage Dynamics, 5/12

80.5 Rum

Rum shipments and revenue in 2012 were as follows (source: DISCUS, change from previous year in parenthesis):

	Volume	Revenue
• Total:	25.50 million cases* (1.5%)	$2.31 billion (1.9%)
• Value tier:	5.96 million cases (3.3%)	$ 292 million (2.9%)
• Premium tier:	16.38 million cases (1.3%)	$1.59 billion (2.3%)
• High-end premium tier:	2.77 million cases (-1.5%)	$ 333 million (-2.5%)
• Super premium tier:	386,000 cases (8.1%)	$ 98 million (8.1%)

* 9-liter case equivalents

The following are the leading brands of rum in the U.S., ranked by number of cases shipped in 2012 (source: The Beverage Information Group, change from previous year in parenthesis):

- Bacardi: 9.45 million cases* (0.5%)
- Captain Morgan: 5.49 million cases (-0.2%)
- Malibu: 1.74 million cases (6.6%)
- Admiral Nelson: 725,000 cases (3.9%)

- Cruzan: 725,000 cases (11.3%)
- Sailor Jerry: 667,000 cases (16.0%)
- Parrot Bay: 560,000 cases (-1.8%)
- Ronrico: 424,000 cases (-0.5%)

* 9-liter case equivalents

A favorite American spirit long before bourbon whiskey, rum is a sweet, distilled spirit made from sugar cane. Although debate continues as to where rum was first produced, by the late seventeenth century the liquor was being distilled in the American colonies using molasses from the West Indies.

By federal law, rum must be distilled from the fermented juice of sugar cane, sugar cane syrup, sugar cane molasses, or other sugar cane byproducts at less than 190 proof. It can be made anywhere, although more than 80% of rum is produced in Puerto Rico. The two main types of rum are light-bodied rums, which have a dry, subtle flavor, and full-bodied rums, a more aromatic variety.

Growth in rum sales are driven largely by increasing popularity of the Mojito, a traditional Cuban cocktail that came into vogue in the U.S. during the late 1980s, along with other rum cocktails.

> **"Sometimes, a spirit category can seem to be heading in many different directions at once. That seems to be the case with rum today: white rum has been losing a bit of its massive attraction, though it's still responsible for more than half the rum business. Spiced rum sales are going through the roof, with new brands, line extensions and packaging signaling a lively interest among both consumers and suppliers. Flavored rums continue to be a source for innovation, and aged and super-premium rums are developing a fan base among the cocktail cognoscenti."**
>
> *Beverage Dynamics*, 7/12

80.6 Tequila

Tequila shipments and revenue in 2012 were as follows (source: DISCUS, change from previous year in parenthesis):

	Volume	Revenue
• Total:	12.37 million cases* (2.9%)	$1.88 billion (4.6%)
• Value tier:	2.88 million cases (1.8%)	$ 221 million (1.8%)
• Premium tier:	6.44 million cases (1.0%)	$ 749 million (19.2%)
• High-end premium tier:	1.12 million cases (7.0%)	$ 205 million (2.0%)
• Super premium tier:	1.90 million cases (9.1%)	$ 707 million (-1.3%)

* 9-liter case equivalents

The following are the leading brands of tequila in the U.S., ranked by number of cases shipped in 2011 (source: The Beverage Information Group, change from previous year in parenthesis):

- José Cuervo: 3.35 million cases* (-1.5%)
- Patrón: 1.88 million cases (6.5%)
- Sauza: 1.74 million cases (9.9%)
- Juarez: 810,000 cases (4.1%)
- 1800: 805,000 cases (17.0%)
- Montezuma: 540,000 cases (-0.9%)

* 9-liter case equivalents4.3

Tequila boasts a uniquely exotic provenance that must be certified by the Mexican government's Tequila Regulatory Council (Consejo Regulador del Tequila; www.crt.org.mx). Just as Champagne can come only from the eponymous region in France, authentic tequila must hail from the area around the town of Tequila, in the state of Jalisco. Likewise, it must be made from the blue agave plant. Premium tequilas are 100% blue agave. Blended tequilas, known as mixtos, must contain at least 51% blue agave with the balance coming from sugar cane or maize.

Although tequila originated as a peasant drink, it now often commands prices higher than those of many Scotches and vodkas, with certain specialty brands ranging from $40 a bottle up to $2,000 a bottle.

> **"Fresh-tasting. Light. Versatility and mixability. More than just shots. These characteristics have helped the tequila category evolve into what it is today. There is a sophistication toward the category that did not exist a decade ago."**
>
> *Beverage Dynamics*, 5/12

80.7 Gin

Gin shipments and revenue in 2012 were as follows (source: DISCUS):

	Volume	Revenue
• Total:	10.73 million cases* (1.5%)	$873 million (2.7%)
• Value tier:	7.36 million cases (-0.8%)	$434 million (-0.8%)
• Premium tier:	1.14 million cases (19.2%)	$129 million (19.2%)
• High-end premium tier:	2.15 million cases (2.0%)	$296 million (2.0%)
• Super premium tier:	79,000 cases (-1.3%)	$ 13 million (-1.3%)

* 9-liter case equivalents

The following are the leading brands of gin in the U.S., ranked by number of cases shipped in 2011 (source: The Beverage Information Group, change from previous year in parenthesis):

- Seagram's Gin: 2.36 million cases* (-5.1%)
- Tanqueray: 1.26 million cases (-2.3%)
- Bombay Sapphire: 818,000 cases (1.0%)
- Gordon's: 790,000 cases (-1.3%)
- New Amsterdam: 750,000 cases (-7.4%)
- Beefeater: 510,000 cases (-0.2%)
- Gilbey's: 418,000 cases (-3.5%)

* 9-liter case equivalents

Gin is a flavored spirit. Without the flavoring, it would be vodka. Aging is not a factor with gin, although U.S. producers sometimes age their gins, imparting a pale, golden color. Each gin achieves its distinct taste through the distiller's specific combination of gin botanicals, such as cassia, anise, coriander, angelica, and juniper.

"The gin category broadened a few years ago with the introduction of gins that do not have the traditional strong juniper flavors. Newer gin offerings that are less reliant on juniper give bartenders more options. This allows the gins to play easier with other spirits in mixing, due to the softer nuances of their botanical choices."

Mike Hanley, Beverage Director
Tavistock Restaurants
Cheers, 1/13

80.8 Brandy and Cognac

Brandy and cognac shipments and revenue in 2012 were as follows (source: DISCUS):

	Volume	Revenue
• Total:	10.99 million cases* (1.2%)	$1.52 billion (3.9%)
• Value tier:	7.23 million cases (-0.5%)	$ 537 million (-1.1%)
• Premium tier:	300,000 cases (0.6%)	$ 44 million (0.3%)
• High-end premium tier:	2.56 million cases (4.2%)	$ 569 million (5.8%)
• Super premium tier:	906,000 cases (7.4%)	$ 367 million (9.6%)

* 9-liter case equivalents

The following are the leading brands of brandy in the U.S., ranked by number of cases shipped in 2011 (source: The Beverage Information Group, change from previous year in parenthesis):

- E&J: 3.07 million cases* (0.5%)
- Paul Masson: 1.30 million cases (-0.5%)
- Christian Brothers: 1.15 million cases (-2.5%)

* 9-liter case equivalents

The following were the leading brands of brandy and cognac in the U.S. in 2011:

- Hennessey: 2.20 million cases (1.4%)
- Rémy Martin: 597,000 cases (6.2%)
- Courvoisier: 319,000 cases (8.5%)

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 an 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.

"The contrast between brandy and cognac trajectories continues: brandy, the larger of the two in volume, dropped 1.5% in 2011."

Beverage Dynamics, 12/12

80.9 Cordials

Cordial shipments and revenue in 2012 were as follows (source: DISCUS, change from previous year in parenthesis):

	Volume	Revenue
• Total:	21.24 million cases* (4.7%)	$2.52 billion (3.1%)
• Value tier:	8.08 million cases (9.8%)	$ 481 million (9.8%)
• Premium tier:	11.14 million cases (0.4%)	$1.61 billion (-0.6%)
• High-end premium tier:	1.83 million cases (10.7%)	$ 421 million (10.9%)
• Super premium tier:	11,000 cases (25.9%)	$ 4 million (28.4%)

* 9-liter case equivalents

The following are the leading brands of cordials and liqueurs in the U.S., ranked by number of cases shipped in 2009 (most recent data available; source: The Beverage Information Group):

• Jägermeister:	2.72 million cases*
• DeKuyper:	2.53 million cases
• Southern Comfort:	1.37 million cases
• Baileys:	1.32 million cases
• Kahlua:	1.03 million cases
• Hiram Walker Cordials:	918,000 cases
• Grand Marnier:	484,000 cases
• Hpnotiq:	455,000 cases

* 9-liter case equivalents

The cordial or liqueur category is the largest and most diverse in terms of the number of brands, flavors, and alcohol content. It also is one of the largest in total case sales. Products in this category encompass all flavors and are used as after-dinner drinks, aperitifs, components of classic cocktails or popular shooters, or flavorful enhancements to foods.

Originating in Europe, cordials and liqueurs are alcoholic beverages that are prepared by mixing or compounding various spirits with flavorings. The cordial category includes schnapps, liqueurs, cremes, and brandies.

81

WINE

81.1 Market Assessment

Wine consumption and gross revenues in the U.S. have been as follows (sources: Beverage Marketing Corporation [www.beveragemarketing.com] and Canadean [www.canadean.com]; change from previous year in parenthesis):

	Consumption	Gross Revenues
• 2002:	583.8 million gallons (5.0%)	$ 7.0 billion (6.1%)
• 2003:	614.1 million gallons (5.2%)	$ 7.5 billion (7.1%)
• 2004:	637.4 million gallons (3.7%)	$ 7.9 billion (5.3%)
• 2005:	651.3 million gallons (2.2%)	$ 8.3 billion (5.1%)
• 2006:	673.4 million gallons (3.4%)	$ 8.6 billion (3.5%)
• 2007:	700.5 million gallons (4.0%)	$ 9.2 billion (7.0%)
• 2008:	706.2 million gallons (0.8%)	$ 9.4 billion (2.2%)
• 2009:	716.8 million gallons (1.5%)	$ 9.5 billion (1.1%)
• 2010:	732.1 million gallons (2.1%)	$ 9.8 billion (3.1%)
• 2011:	748.8 million gallons (2.3%)	$10.2 billion (4.1%)
• 2012:	769.7 million gallons (2.8%)	n/a

Distribution of the U.S. table wine market by origin is as follows (source: The Beverage Information Group [www.beveragenet.net]):

- California: 68%
- Imported: 26%
- Other states: 6%

Among adults, per capita consumption of table wine was 3.08 gallons in 2012.

According to London-based *International Wine and Spirits Record* (www.iwsp.co.uk), wine consumption in the U.S. is up more that 30% over the past decade, elevating the U.S. past Italy as the world's second-largest consumer of wine. Silicon Valley Bank (www.siliconvalleybank.com) reported consumption reached 3.8 billion bottles in 2010, pushing the U.S. past France as the world's top wine consumer. Consumption further increased to 4.0 billion bottles in 2012.

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

According to Symphony IRI Group (www.symphonyiri.com), annual wine sales in supermarkets, drug stores, and mass merchandisers (excluding Walmart) for the 52-week period ending April 15, 2012 were $6.8 billion.

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).

81.2 U.S. Wine Exports

In 2011, U.S. wine exports (90% from California) increased 21.7% in value to $1.39 billion in winery revenues; this followed a 25.6% increase in 2010. Volume shipments rose 5.8% to 50.6 million nine-liter cases, according to the U.S. Department of Commerce. Wine exports were distributed by country/region as follows:

- European Union: $478 million
- Canada: $379 million
- Hong Kong: $163 million
- Japan: $105 million
- China: $ 63 million

81.3 Market Leaders

According to Symphony IRI Group, the following are the top wine brands sold at supermarkets, drug stores, convenience stores, and mass merchandisers (excluding Walmart), ranked by sales during the 52-week period ending April 15, 2012 (change from prior year in parenthesis):

- Barefoot: $368.4 million (18.9%)
- Sutter Home: $278.7 million (5.5%)
- Yellow Tail: $231.1 million (3.2%)
- Franzia: $205.6 million (1.9%)
- Woodbridge by Robert Mondavi: $198.4 million (6.6%)
- Kendall Jackson Vintners: $153.6 million (2.4%)
- Gallo Family Vineyards: $129.6 million (13.1%)
- Beringer: $121.9 million (-7.7%)
- Carlo Rossi: $111.6 million (-4.8%)
- Chateau Ste. Michelle: $105.8 million (8.3%)

81.4 Wine Consumer Characteristics

According to *2012 Consumer Tracking Study*, conducted for the Wine Market Council (www.winemarketcouncil.com), among 228 million U.S. adults, 100 million were wine drinkers in 2012. For comparison, 78 million adults were non-drinkers and 50 million said they drink only beer or distilled spirits.

Twenty-five percent (25%) of U.S. adults are identified as wine drinkers. Distribution of adults by consumption characteristics is as follows:

- Core wine drinker (once per week or more frequently): 25%
- Marginal consumer of wine (once every two or three months): 19%

- Drink beer or spirits only: 22%
- Do not consume alcoholic beverages: 34%

Core wine drinkers account for 91% of wine consumption by volume, with marginal wine drinkers consuming the remaining 9%.

Among those who drink wine, distribution by frequency of consumption is as follows:

- Daily: 11%
- More than once per week: 28%
- Once per week: 17%
- Two-to-three times per month: 20%
- Once per month: 13%
- Once every two or three months: 11%

The demographic distribution of core wine drinkers is as follows:

Gender
- Female: 51%
- Male: 49%

Age
- Millennial (age 19-to-36): 28%
- Generation X (age 37-to-48): 20%
- Baby Boomers (age 49-to-67): 40%
- Seniors (age 67 and older): 12%

Household Income
- Less than $50,000: 36%
- $50,000 to $69,999: 21%
- $70,000 to $99,999: 20%
- $100,000 to $129,999: 11%
- $130,000 to $199,999: 8%
- More than $200,000: 3%

81.5 Champagne and Sparkling Wine

Sparkling wine, considered a festive drink, is typically uncorked at occasions like New Year's Eve, wedding receptions, and parties. According to M. Shanken Communications (www.mshanken.com), Americans consume more than 260 million glasses of sparkling wine during the holiday season.

Sparkling wines are made all over the world, but those hailing from the Champagne region of France – the only ones that can be called 'champagne' – have a special cachet. An 80-year-old French law carefully maps where the grapes – pinot noir, pinot meunier, and chardonnay – can be grown. Comité Interprofessionnel du Vin de Champagne (CIVC), the industry's regulatory body, sets a maximum yield of 10,500 kilograms per hectare (4.7 tons per acre) for the annual harvest. Champagne can be sold 15 months after harvest; Vintage Champagne and a Champagne Grande Année must age at least five years.

According to the Champagne Bureau (www.champagne.us) 16 million bottles of Champagne were shipped to the U.S. in 2011, a 28% increase from the year prior but down significantly from the peak of 23.2 million bottles shipped in 2006.

Moët & Chandon and Veuve Clicquot, with 600,000 and 400,000 cases, respectively, produced annually, are the leading producers of champagne. These two brands, which together account for 55% of champagne sold in the U.S. – along with Krug, Ruinart, and Mercier – are owned by the luxury giant LVMH (www.lvmh.com).

Champagne made by independent grower-producers has been quietly gaining a foothold. Many of these small, family-owned vineyards have long supplied the big houses with grapes: land in Champagne is limited, so big makers rely on the 20,000 or so small farmers across the region for their grapes, which they blend together. About 2,000 of these farmers make their own bubbly, the best of which is increasingly available in the United States.

With a steadily increasing demand, winemakers have asked French regulators to redefine or even expand the boundaries of the Champagne region.

Leading U.S. producers of sparkling wine are Andre Champagne Cellars (1.7 million), Cook's (1.3 million), and Korbel Champagne Cellars (1.2 million cases annually).

81.6 Oneophiles

Enjoyment of wine as a hobby is helping to drive the market. Participation in wine clubs, winery tours, wine tastings, wine auctions, and wine festivals has become popular. For oenophiles, or wine connoisseurs, drinking, learning about, and collecting wine is a cultural and educational experience.

Among core wine drinkers (i.e. those who drink wine at least weekly), 18% are a members of a wine club; 3% are members of three or more clubs, according to the Wine Market Council.

No other beverage, and few consumer products of any type, are prized as an investment like wine. In 2011, a 300-bottle collection of Chateau Lafite Rothschild sold at a Christie's auction for $539,280, a record.

According to Fireman's Fund (www.firemansfund.com), as many as 10% of the nation's most affluent households have wine collections worth at least $100,000.

82

REFRESHMENT & FUNCTIONAL BEVERAGES

82.1 Carbonated Soft Drinks

According to Beverage Marketing Corporation (www.beveragemarketing.com), consumption of carbonated soft drinks (CSD) has been as follows (change from previous year in parenthesis):

- 2003: 15.3 billion gallons (0.4%)
- 2004: 15.4 billion gallons (0.7%)
- 2005: 15.3 billion gallons (-0.6%)
- 2006: 15.1 billion gallons (-1.1%)
- 2007: 14.7 billion gallons (-2.6%)
- 2008: 14.2 billion gallons (-3.1%)
- 2009: 13.9 billion gallons (-2.3%)
- 2010: 13.8 billion gallons (-0.8%)
- 2011: 13.6 billion gallons (-1.7%)

"This marks the seventh consecutive year of declines for the category. Consumers simply want healthier refreshment. With more beverages on the shelf each year, carbonated soft drinks are losing drinking occasions. Companies need to figure out how to give consumers new reasons to pick up CSDs. That's a tough challenge."

Michael Bellas, CEO
Beverage Marketing Corp.
Beverage World, 5/12

Even with declining consumption, CSDs still account for about 45% of all nonalcoholic beverages (by volume) consumed in the United States, excluding tap water. Carbonated soft drinks account for a consumption equal to bottled water and beer (the #2 and #3 categories) combined.

Of CSD consumption, 67% is regular beverages and 33% is diet beverages. Diet beverages are increasing in marketshare at about 3.5% annually.

According to Symphony IRI Group (www.symphonyiri.com), annual carbonated soft drink beverage sales in supermarkets, drug stores, and mass merchandisers (excluding Walmart) are $13.6 billion.

The Nielsen Company (www.nielsen.com) reports annual sales of pre-packaged CSDs at convenience stores at $8.1 billion.

Overall marketshare by soft drink beverage company in 2011 was as follows (source: Beverage Marketing Corporation):

- Coca-Cola Company: 43.1%
- PepsiCo Inc.: 29.2%
- Dr. Pepper Snapple Group: 17.1%
- Cott Corp.: 3.5%
- National Beverage Corp.:* 2.9%
- All others: 4.2%

* Includes Faygo and Shasta brands

Marketshare by soft drink brand in 2011 was as follows (source: Beverage Marketing Corporation):

- Coca-Cola Classic: 11.6%
- Diet Coke: 6.7%
- Pepsi-Cola: 6.6%
- Mountain Dew: 4.7%
- Dr. Pepper: 4.4%
- Sprite: 3.9%
- Diet Pepsi: 3.2%
- Diet Mountain Dew: 1.5%
- Coke Zero: 1.3%
- Diet Dr. Pepper: 1.3%
- All others: 54.9%

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)

82.2 Consumption Demographics

According to International Demographics (www.themediaaudit.com), the following are the metropolitan areas with the highest average number of times per capita soft drink beverages were consumed per week in 2012:

- Little Rock, AR: 9.95
- Cincinnati, OH: 8.60
- Sarasota, FL: 8.53
- Greenville-Spartanburg, SC: 8.43
- Oklahoma City, OK: 8.37
- Louisville, KY: 8.04
- Baltimore, MD: 8.02
- Melbourne, FL: 7.90
- Columbia-Jefferson City, MO: 7.89
- Omaha-Council Bluffs, NE: 7.84

The following metropolitan areas had the lowest average soft drink consumption in 2012:

- Miami-Ft. Lauderdale, FL: 5.06
- New York, NY: 5.35
- Sacramento, CA: 5.52
- Detroit, MI: 5.91
- Ft. Myers-Naples, FL: 5.97

Data on soft drink consumption in 93 metropolitan areas is available online at www.themediaaudit.com/press/local-releases.

82.3 Sports Beverages

According to Beverage Marketing Corporation, consumption of sports beverages has been as follows (change from previous year in parenthesis):

- 2003: 883 million gallons (14%)
- 2004: 990 million gallons (12%)
- 2005: 1.21 billion gallons (22%)
- 2006: 1.32 billion gallons (12%)
- 2007: 1.35 billion gallons (2%)
- 2008: 1.32 billion gallons (-3%)
- 2009: 1.16 billion gallons (-12%)
- 2010: 1.26 billion gallons (9%)
- 2011: 1.37 billion gallons (9%)

The average consumer drinks approximately 4.3 gallons of sports drinks annually.

According to *Beverage Digest*, annual retail sales of sports drinks are approximately $9 billion, an increase from about $2 billion 10 years ago.

According to Symphony IRI Group, annual sports drink sales in supermarkets, drug stores, and mass merchandisers (excluding Walmart) are approximately $1.9 billion.

Gatorade (www.gatorade.com), the sports drink developed in 1965 at the University of Florida, has more than 80% marketshare of the sports drink category. Gatorade was acquired by PepsiCo (www.pepsico.com) in 2000 as part of the $13 billion acquisition of Quaker Oats Company.

Powerade (www.powerade.com), a division of The Coca-Cola Company, holds the number two market position in the segment, with a 13% marketshare.

The top sports drinks, ranked by 2011 retail sales, are as follows (source: Symphony IRI Group; change from previous year in parenthesis):

- Gatorade G Series Perform: $2.02 billion (24.9%)
- Powerade Ion 4: $ 659 million (4.4%)
- Gatorade: $ 421 million (-18.5%)
- Gatorade G2 Perform: $ 421 million (36.4%)
- Powerade Zero: $ 184 million (3.0%)
- Gatorade Frost: $ 56 million (-27.1%)
- Gatorade Cool Blue: $ 55 million (-6.5%)
- G2: $ 47 million (-58.8%)
- Powerade: $ 39 million (0.6%)
- Gatorade Recover: $ 38 million (19.7%)

"It's already been two years since the folks at Pepsi revamped the brand, targeting its new varieties at different kinds of athletes and more specific usage occasions. Two years later, the move seems to have paid off – Gatorade Perform saw sales rise by 25% in 2011, reversing the deep declines Gatorade was seeing in the years leading up to the revamp."

Beverage World, 5/12

82.4 Energy Drinks

According to Beverage Marketing Corporation, energy drink consumption has been as follows (change from previous year in parenthesis):

- 2003: 60 million gallons (55%)
- 2004: 94 million gallons (64%)
- 2005: 161 million gallons (79%)
- 2006: 243 million gallons (49%)
- 2007: 336 million gallons (28%)
- 2008: 354 million gallons (9%)
- 2009: 354 million gallons (no change)
- 2010: 384 million gallons (5%)
- 2011: 450 million gallons (18%)

"What a year, what a year. When all was said and done, the energy drink category racked up a volume increase of 17.2% in 2011. They've hit that sweet spot with usage occasions all day long and they've had some wonderful new product introductions."

Gary Hemphill, Managing Director
Beverage Marketing Corporation
Beverage World, 5/12

According to Symphony IRI Group, annual energy drink sales in supermarkets, drug stores, and mass merchandisers (excluding Walmart) are $1.25 billion.

More than 2,000 energy drink brands are on the market in the U.S., according to *Brandweek*.

According to *Beverage World State of The Industry 2012*, market leaders are as follows (change from previous year in parenthesis):

Energy Drinks

- Red Bull: $2.60 billion (16%)
- Monster Energy: $1.38 billion (23%)
- Rockstar: $ 472 million (12%)
- NOS: $ 237 million (12%)
- Java Monster: $ 197 million (16%)
- Monster Mega: $ 196 million (14%)
- Amp: $ 142 million (2%)
- Rockstar Recovery: $ 138 million (128%)
- Monster Rehab: $ 125 million (1,550%)
- Full Throttle: $ 97 million (-11%)

Energy Shots

- 5 Hour Energy: $928 million (17%)
- 5 Hour Energy Extra: $ 54 million (483%)
- Stacker 26 Hour Power: $ 29 million (-7%)
- Worx Energy: $ 13 million (4,554%)

Despite the hip and trendy image associated with energy drinks, only 4% of energy drink buyers cited "cool and trendy" as a reason for their energy drink purchase in a recent survey by The NPD Group. NPD found "the need for an energy boost" to be the number one reason for purchase across all buyer segments. Taste and preference for the energy category as the biggest attraction among younger consumers, while older buyers cited the need for caffeine, instant energy, and an alternative to coffee. Thirty-six percent (36%) of energy drink buyers reported doing something work-related when they made their last energy drink purchase; more than travel, school, meal time, and sporting events combined.

Seventy percent (70%) of energy drink buyers in the NPD survey reported purchasing their drinks cold and for immediate consumption. Over one-half of energy drink purchases are unplanned. The convenience channel has reaped the benefits of this impulse behavior. Two-thirds of buyers cite a purchase in the convenience retail channel within the past six months, and 50% report their last purchase in this channel rather than in traditional grocery stores.

82.5 Juice & Fruit Drinks

According to Beverage Marketing Corporation, annual consumption of fruit beverages is 3.5 billion gallons, a figure which has been declining about 2% annually in recent years.

The juices market consists of 100% fruit juice from concentrate, 100% fruit juice not from concentrate, nectar (30%-to-99% juice), fruit drinks (0-to-29% juice), and vegetable juice. The 100% juice categories account for 68% of the market.

According to Mintel (www.mintel.com), annual consumer spending for juice and fruit beverages is approximately $19 billion, an amount that has remained relatively constant in recent years. While sales in supermarkets have declined slightly, spending on RTD juice drinks at other retail outlets has increased.

According to *Beverage World*, the annual packaged juice market, by category, is as follows:

- Cranberry: $1.11 billion
- Apple: $ 828 million
- Vegetable other than tomato: $ 818 million
- Grape: $ 367 million
- Orange: $ 166 million
- Tomato: $ 108 million
- Prune: $ 101 million

- Pineapple: $ 87 million
- Grapefruit: $ 58 million

According to Symphony IRI Group, annual juice and fruit drink sales in supermarkets, drug stores, and mass merchandisers (excluding Walmart), by category, are as follows:

- Refrigerated juices and drinks: $4.5 billion
- Bottled juices: $3.8 billion
- Aseptic packaged juices: $ 900 million
- Canned juices: $ 500 million
- Frozen juices: $ 400 million

According to the *Beverage World State of The Industry*, RTD juice and smoothie market leaders are as follows (change from previous year in parenthesis):

Refrigerated Juice and RTD Smoothies

- Naked: $104.3 million (18.6%)
- Naked Superfood: $ 97.8 million (36.3%)
- Bolthouse Farms: $ 56.4 million (50.8%)
- Odwalla: $ 32.2 million (11.1%)

Single-Serve Bottled Juice and RTD Smoothies

- SoBe: $20.6 million (4.9%)
- F'real: $ 5.2 million (15.6%)
- V8 Splash Smoothies: $ 4.1 million (-6.7%)

According to Symphony IRI Group, the following are the leading orange juice brands sold at supermarkets, drug stores, convenience stores, and mass merchandisers (excluding Walmart), ranked by sales during the 52-week period ending April 15, 2012 (change from prior year in parenthesis):

- Tropicana Pure Premium: $835.2 million (-6.5%)
- Simply Orange: $502.7 million (3.6%)
- Private label: $450.8 million (-4.4%)
- Florida's Natural: $320.5 million (11.0%)
- Minute Maid Premium: $241.1 million (-2.4%)
- Minute Maid: $ 65.3 million (155.5%)
- Minute Maid Premium Kids: $ 26.0 million (5.5%)

The leading brands of bottled fruit drinks during the same period are as follows (source: Symphony IRI Group; change from prior year in parenthesis):

- Hawaiian Punch: $185.5 million (1.4%)
- V8 Splash: $125.8 million (10.4%)
- Tampico: $ 91.7 million (0.3%)
- Snapple: $ 74.6 million (17.4%)
- Bug Juice: $ 67.2 million (-16.8%)

- Tum-E Yummies: $ 66.3 million (40,3%)
- Private label: $ 65.5 million (4.2%)
- Fuze: $ 60.7 million (934.4%)
- Kool-Aid Bursts: $ 55.1 million (1.4%)

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.

83

COFFEE & TEA

83.1 Coffee Consumption

Americans consumed approximately 7.0 billion gallons of coffee in 2012.

The coffee market consists of three segments:

- Roasted and instant coffee purchased at supermarkets and other retail outlets
- Away-from-home consumption of regular and specialty coffee at coffeeshops, restaurants, and other establishments
- Ready-to-drink (RTD) coffee

Seventy-eight percent (78%) of Americans drink coffee – 62% drink it every day and 73% do so at least weekly – according to *National Coffee Drinking Trends 2012*, by the National Coffee Association (NCA, www.ncausa.org). There are more U.S. consumers who drink coffee daily than there are soft drink consumers (51%). Seventy-three percent (73%) of coffee consumed in the U.S. is prepared at home.

The 2012 survey reported that among those ages 18-to-24, daily consumption jumped from 40% to 50%, and for the 25-to-39 group, 54% to 63%.

Gourmet coffee consumption is on the rise, increasing from 37% of all cups of coffee consumed in the U.S. in 2011 to 46% in 2012. In the 2011 survey by NCA, 25% of Americans said they drank a gourmet coffee within the prior 24 hours; in 2012 32% said they did so.

The 2012 survey also found that consumer adoption of the single-cup format continues to expand. Ownership of single-cup brewers increased to 10% from 7% a year prior, with 36% reportedly owning their single-cup brewer for less than six months. Perception of the quality of coffee from single-cup systems increased, with 25% rating the brewers as “excellent” versus 15% who did so in 2011.

According to *Ethnicity and Coffee*, a September 2012 by the NCA, 74% of Hispanic-Americans drink coffee daily, 12 percentage points ahead of Americans of other ethnicity. Past-week consumption was 80% compared with 72% for non-Hispanic-Americans.

A positive health perception is driving increased coffee consumption. Responses in surveys by the NCA show that 46% of consumers recognize the inherently positive benefits of drinking coffee, an increase from 36% in 2005.

According to Symphony IRI Group (www.symphonyiri.com), annual coffee sales in supermarkets, drug stores, and mass merchandisers (excluding Walmart) are $4.4 billion.

83.2 RTD Coffee

According to the *Beverage World State of The Industry 2012*, 60.8 million gallons of ready-to-drink coffee were consumed in 2011, an 9.4% increase from a year prior.

83.3 Coffeeshops

Coffeeshops are assessed in Chapter 16.

83.4 Tea Consumption

Americans consume over 55 billion servings of tea, or over 2.50 billion gallons, each year.

The Sage Group (www.thesagegroup.com) estimated the retail size of the U.S. tea industry in 2011 at more than $27 billion. A January 2013 estimate by *Nation's Restaurant News* placed the market significantly higher, at $40 billion.

According to *The 2012 State of the U.S. Tea Industry*, by the Tea Association of the USA (www.teausa.com), tea imports were 281 million pounds in 2011; wholesale tea sales were $8.2 billion.

> **"The U.S. tea industry has fared better than most sectors during the past three-to-four years. 2011 has seen yet another, albeit modest, increase in tea imports of just under 1% but still achieving record breaking total tea imports. The dollar value of wholesale tea sales is estimated to be up a modest 5%. Within the tea industry there are segments that are faring better than others, with RTD and Specialty Tea on top of the list."**
>
> Joseph P. Simrany, President
> Tea Association of the U.S.A.
> *The 2012 State of the U.S. Tea Industry*

According to the Tea Association of the USA, after water, tea is the most widely consumed beverage in the world. Tea can be found in almost 80% of U.S. households. It is the only beverage commonly served hot or iced, anytime, anywhere, for any occasion. On any given day, over 130 million Americans – about one-half the population – drink tea.

U.S. tea consumption by type is as follows:

- Eighty-five percent (85%) of tea consumed in the U.S. is iced.
- Eighty-two percent (82%) of all tea consumed is black tea, 17% is green tea, and 1% is oolong, red, and white tea.
- Sixty-five percent (65%) of the tea brewed in the United States is prepared using tea bags.
- Instant and loose tea account for about three-fourths of tea consumed in the U.S.; ready-to-drink (RTD) and iced tea mixes comprise about one fourth.

According to Symphony IRI Group, annual sales of bag and loose tea in supermarkets, drug stores, and mass merchandisers (excluding Walmart) are are $750 million.

83.5 RTD Tea

According to Beverage Marketing Corporation, consumption of RTD tea has been as follows (change from previous year in parenthesis):

- 2003: 497.0 million gallons (1%)
- 2004: 509.9 million gallons (3%)
- 2005: 555.9 million gallons (9%)
- 2006: 760.9 million gallons (37%)
- 2007: 875.1 million gallons (15%)
- 2008: 859.3 million gallons (-2%)
- 2009: 901.4 million gallons (1%)
- 2010: 1.014 billion gallons (12%)
- 2011: 1.063 billion gallons (5%)

The marketshare leaders in RTD tea, ranked by 2011 sales, are as follows (source: Beverage Marketing Corporation; change from previous year in parenthesis):

- AriZona: $614.4 million (-2.5%)
- Lipton Brisk: $286.2 million (7.8%)
- Lipton: $257.4 million (-14.0%)
- Snapple: $188.2 million (1.2%)
- Lipton Pureleaf: $148.6 million (-10.5%)
- AriZona Arnold Palmer: $146.0 million (45.8%)
- Diet Snapple: $143.0 million (11.5%)
- Nestéa: $ 99.7 million (-9.5%)
- Gold Peak: $ 84.8 million (11.6%)
- Lipton Diet: $ 75.4 million (26.2%)
- Peace Tea: $ 61.7 million (60.0%)
- Private label: $ 41.4 million (-14.5%)

According to Symphony IRI Group, annual RTD tea sales in supermarkets, drug stores, and mass merchandisers (excluding Walmart) are $1.6 billion. Annual convenience store sales of RTD tea are $1.0 billion, according to The Nielsen Company (www.nielsen.com).

83.6 Tea Stores and Tea Bars

There are only a few dozen tea bars in the United States, excluding coffeeshops that also have tea on their menu or retail tea stores that also offer limited beverage service. Argo Tea, with 16 locations in the U.S., is the largest tea bar chain. For comparison, there are approximately 20,000 coffeeshops in the U.S. and Starbucks operates over 11,000 locations.

Given the increasing popularity of tea, the tea bar count could rise dramatically in the near future. Several companies are rolling out plans for expansion.

In November 2012, Starbucks announced an agreement to acquire the 300-unit Teavana retail tea brand for $620 million. Teavana derives only about 5% of revenue from beverage service. With the acquisition, Starbucks plans to turn Teavana into a place where patrons can enjoy a cup of brewed tea as well as purchase retail tea products.

> **"[Starbucks CEO] Howard Schultz pledged to 'do for tea what we did for coffee.' Considering that Starbucks was the chain that brought premium coffee to the masses, that is good news for those who have long promoted premium tea."**
>
> *Nation's Restaurant News*, 1/14/13

In 2012, The Coffee Bean & Tea Leaf announced plans to add a tea-bar concept to its 850 coffeeshop units.

Also in 2012, the McAlister Deli chain debuted a prototype restaurant with a stand-apart tea bar.

Jamba Juice, which invested in Talbott Tea, a premium tea brand, announced plans to introduce hot and cold tea to its menu and sell packaged tea at its over-800 locations.

Portola Coffee Lab, a Southern California chain, launched Seventh Tea Bar as a standalone concept in early 2013.

84

BOTTLED WATER

84.1 Consumption and Spending

According to Beverage Marketing Corporation (www.beveragemarketing.com), consumption of bottled water has been as follows (change from previous year in parenthesis):

- 2004: 6.8 billion gallons (9%)
- 2005: 7.5 billion gallons (11%)
- 2006: 8.3 billion gallons (10%)
- 2007: 8.8 billion gallons (6%)
- 2008: 8.7 billion gallons (-1%)
- 2009: 8.4 billion gallons (-3%)
- 2010: 8.7 billion gallons (3%)
- 2011: 9.1 billion gallons (4%)

Per capita consumption of bottled water increased from 21.6 gallons in 2003 to 29.2 gallons per person in 2011.

According to the International Bottled Water Association (IBWA, www.bottledwater.org), annual wholesale sales of bottled water are approximately $10.5 billion.

Annual bottled water sales in supermarkets, drug stores, and mass merchandisers (excluding Walmart) are $5.0 billion, according to Symphony IRI Group (www.symphonyiri.com).

Annual convenience store sales of bottled water are $2.5 billion, according to The Nielsen Company (www.nielsen.com).

"Bottled water continued to gain volume in 2011 as signs of a recovering economy coaxed consumers back to purchasing packaged water. Driving the category was single-service private label PET, offering value to customers."

Beverage World, 5/12

84.2 Consumption Demographics

According to International Demographics (www.themediaaudit.com), the following are the metropolitan areas with the highest percentage of adults who purchased bottled water at least once per month in 2012:

- Dallas-Ft. Worth, TX: 67.1%
- Charlotte, NC: 65.2%
- New York, NY: 63.3%
- Boston, MA: 62.6%
- Norfolk, VA: 62.6%
- Las Vegas, NV: 62.0%
- Orlando, FL: 61.8%
- Philadelphia, PA: 61.5%
- Indianapolis, IN: 61.3%
- Oklahoma City, OK: 61.3%

The following metropolitan areas had the lowest percentage of adults purchasing bottled water in 2012:

- Columbia-Jefferson City, MO: 36.5%
- Rochester, NY: 36.8%
- Grand Rapids, MI: 40.9%
- Louisville, KY: 41.5%
- Madison, WI: 42.0%

Data on bottled water purchases in 93 metropolitan areas is available online at www.themediaaudit.com/press/local-releases.

84.3 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

Ranked by total wholesale sales in 2011, the top brands of bottled water are as follows (source: Beverage Marketing Corporation; change from prior year in parenthesis):

- Dasani: $1.22 billion (11.0%)
- Aquafina: $1.14 billion (10.3%)
- Poland Spring: $ 884 million (8.0%)

- Nestlé Pure Life: $ 860 million (7.8%)
- Crystal Geyser: $ 519 million (4.7%)
- Deer Park: $ 445 million (4.0%)
- Arrowhead: $ 408 million (3.7%)
- Ozarka: $ 339 million (3.1%)
- Ice Mountain: $ 268 million (2.4%)
- Zephyrhills: $ 240 million (2.2%)

note: functional water brands are excluded

According to Symphony IRI Group, the top-selling bottled water brands in supermarkets, drug stores, convenience stores, and mass merchandisers (excluding Walmart) in 2011 were as follows (change from prior 12-month period in parenthesis):

- Private label: $1.03 billion (4.2%)
- Aquafina: $ 686 million (-4.3%)
- Dasani: $ 651 million (-7.8%)
- Glacéau Vitaminwater: $ 645 million (4.2%)
- Poland Spring: $ 388 million (-2.9%)
- Nestlé Pure Life: $ 380 million (22.1%)
- Glacéau Smartwater: $ 348 million (21.6%)
- Deer Park: $ 237 million (-0.6%)
- Glacéau Vitaminwater Zero: $ 208 million (46.5%)
- Ozarka: $ 196 million (2.7%)

84.4 Market Drivers

Consumers drink bottled water primarily because it is perceived to be pure, natural, and safer than water from municipal supplies. Convenience is also an important factor driving the bottled water market.

The rise of bottled water in the marketplace, however, has not been without challenges. The industry has been under fire from environmental advocates, blamed for being wasteful and a contributor to global warming. Fewer than a quarter of PET (polyethylene terepthalate) bottles used for packaging are recycled in the U.S., leaving two billion pounds annually for discard in landfills. Still, that amounts to less than 1% of solid waste generated in the U.S. each year.

85

MILK

85.1 Consumption and Dairy Production

According to the International Dairy Foods Association (IDFA, www.idfa.org), 93% of households purchase milk at least once each year. The percentages of households purchasing various types of fluid milk are as follows:

- Reduced fat white milk: 56%
- Whole white milk: 42%
- Fat free white milk: 35%
- Low fat white milk: 34%
- Flavored milk: 32%

The Economic Research Service of the U.S. Department of Agriculture (USDA, www.usda.gov) reported that total farm milk production in 2012 in the U.S. was 203 billion pounds, a 1.7% increase over the previous year.

The Dairy Farmers of America (www.dfamilk.com), a dairy marketing cooperative owned by 19,500 dairy farmers across the U.S., sells more than 62 billion pounds of milk annually for its members.

85.2 Consumer Spending

According to Symphony IRI Group (www.symphonyiri.com), 2011 milk sales in supermarkets, drug stores, and mass merchandisers (excluding Walmart) were $11.8 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.

85.3 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%

86

BEVERAGE SERVICE IN RESTAURANTS & BARS

86.1 Market Assessment

According to the National Restaurant Association (www.restaurant.org), beverage sales account for approximately 21% of total revenues in full-service restaurants. Total sales at full-service restaurants for 2013 are projected at $208.7 billion; beverage sales will account for approximately $43.8 billion. At quick-service restaurants, beverages account for approximately 4% of the average customer check. Of the $188.1 billion in projected total sales for 2013, quick-service restaurants are projected to sell an estimated $7.5 billion in beverages. These figures do not include beverage sales at bars and taverns or snack bars.

"Beverages are the most popular items ordered at restaurants in America. Right off the bat, a drink is a very important thing to the market-place. It's not a hamburger or French fries, not that those aren't important, but beverages represent the biggest purchase category."

Harry Blazer, Vice President
The NPD Group

There are approximately 350,000 on-premise licensed locations serving alcoholic beverages in the U.S., according to Trade Dimensions (www.tdlinx.com).

According to Technomic (www.technomic.com), sales of spirits, wine, and beer in restaurants, bars, and other licensed on-premise locations increased 4.9% to $93.7 billion in 2011. Adult beverage on-premise volume declined 1.1%.

A 2012 survey by Mintel (www.mintel.com) found that 44% of full-service restaurant customers had ordered a cocktail in the prior three months.

86.2 Refreshment and Nonalcoholic Beverage Service in Restaurants

According to The NPD Group (www.npd.com), restaurants serve approximately 50 billion nonalcoholic drinks annually. (This total does not include coffeeshops or coffee purchased for takeout.)

The following are the number of servings of nonalcoholic beverages at restaurants (sources: The NPD Group and *Nation's Restaurant News*):

- Regular carbonated soft drinks: 12.10 billion
- Iced tea: 5.35 billion
- Tap water: 4.50 billion
- Diet carbonated soft drinks: 4.17 billion
- Traditional coffee: 3.50 billion
- Bottled water: 2.70 billion
- Specialty coffee: 2.40 billion
- Non-carbonated soft drinks: 2.00 billion
- Juice: 1.90 billion
- Milk: 1.50 billion
- Shakes/malts/floats: 800 million
- Frozen/slushie soft drinks: 770 million
- Hot tea: 650 million
- Iced coffee: 500 million
- Smoothies: 500 million
- Hot chocolate: 210 million

The Beverage Consumer Trend Report, published in September 2012 by Technomic, reported that 71% of adults purchase beverages away from home at least twice a week, an increase from 66% who did so in 2010. Specialty coffee increased by 10% on limited-service menus between 2010 and 2012, smoothies grew by 8.5%, and specialty tea listings nearly doubled.

86.3 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 in 2012 included 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 some popular casual-dining chain restaurants is as follows:

- Dave & Buster's: 35%
- Hard Rock Cafe: 35%
- Rock Bottom Brewery: 34%
- Champps: 30%
- McCormick & Schmick's: 30%

• Morton's The Steakhouse:	29%
• Buffalo Wild Wings Grill & Bar:	29%
• Carrabba's Italian Grill:	26%
• Bahama Breeze:	25%
• Ruth's Chris Steak House:	25%
• T.G.I. Friday's:	25%
• Rainforest Cafe:	23%
• Hooters:	22%
• Bennigan's:	21%
• Maggiano's:	20%
• Buca di Beppo:	19%
• One The Border Mexican Grill & Cantina:	19%
• Uno Chicago Grill:	18%
• P.F. Chang's China Bistro:	15%
• Chili's Grill & Bar:	14%
• LongHorn Steakhouse:	14%
• Joe's Crab Shack:	13%
• The Cheesecake Factory:	13%
• Applebee's Neighborhood Grill & Bar:	12%
• O'Charley's:	12%
• Outback Steakhouse:	12%
• Romano's Macaroni Grill:	12%
• Olive Garden:	9%
• Ruby Tuesday:	9%
• Red Lobster:	8%
• Red Robin Gourmet Burgers:	6%

According to The NPD Group, on-premise servings of alcoholic beverages are distributed as follows:

	Bars	Casual-Dining
• Beer:	54%	50%
• Cocktails:	33%	32%
• Wine:	12%	18%

"Beer is consumers' beverage of choice at full-service places ranging from sports bars to casual-dining restaurants."

Nation's Restaurant News, 5/28/12

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.

Several casual-dining chains are revamping their bar offerings to increase sales. One example is Red Robin Gourmet Burgers, which recently launched early- and late-night happy hours and redesigned menus to highlight alcohol and nonalcoholic beverages. Alcoholic beverages account for about 6% of Red Robin’s sales; for every 1% increase in the alcohol sales mix, the chain sees a $6 million increase in profit.

**“Alcoholic beverages are highly, highly profitable.
It’s been such a challenging time for the industry,
I think they’re trying to pull out all the stops.”**

Bonnie Riggs, Analyst
The NPD Group

According to GuestMetrics (www.guestmetrics.com), a research firm that analyzes point-of-sale data, mixed drink sales increased 1.9% in 2012. Mango margaritas, ginger Mojitos, and similar cocktails with a flavor associated with them drove the growth in mixed drink sales in 2012. Flavored drinks made up about 26% of all cocktails sold, but they accounted for 51% of incremental growth in 2012 with a sales growth rate of 3.9%. The fastest growing drink flavors were mango, which grew by

35%, and tea, which increased by 30%. Ginger and melon flavors each grew by 15% and cucumber was in 10% more cocktails sold.

"The disparity in growth rates of flavored drinks over non-flavored drinks is evident in the types of cocktails sold. The largest category share [are] gains experienced by margaritas and Mojitos, while at the other end of the spectrum, we see that Cosmopolitans and martinis experienced the greatest share loss in 2012."

Peter Reidhead, Vice President
GuestMetrics
Nation's Restaurant News, 1/9/13

86.4 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. In 2010, Burger King began offering beer at its Whopper Bar location in Miami Beach. Beer service was also launched at locations in Las Vegas, Memphis, New York City, and Orlando.

Sonic Drive-In introduced beer service at two Florida locations in 2011; beer is served only on the patio at these restaurants.

White Castle and Burgerville tested beer service at select locations in 2012.

"Fast feeders such as Burger King and Sonic are dabbling in booze in test markets. The moves can bring higher check prices, but also regulatory headaches. And for big fast-food chains, selling booze on a large scale won't deliver huge margins – at least not at first – since it's also likely to add upfront costs."

Advertising Age, 5/21/12

Several fast-casual restaurants chains offer alcoholic beverage service. Chipotle Mexican Grill serves beer and margaritas at most of its 1,100 locations. Noodles & Company, a 260-unit chain, sells beer and wine. Moe's Southwest Grill sells beer and wine at about 40 of its 430 units. Smashburger serves beer at more than 90% of its 156 U.S. locations. Freebirds World Burritos, a 90-unit chain, offers beer at all of its locations and margaritas at some franchised restaurants. While beverage service is well-received by customers at these fast-casual chains, Technomic estimates that even the most successful locations generate only about 5% of sales from alcoholic beverages.

While generating only modest interest among limited-service patrons, beer and wine service poses several operational challenges.

> **"There are plenty of risks. For one, most states require that people who handle or serve alcohol be at least 18 years old and be supervised by someone age 21 or older. This poses complications for fast feeders that often hire minors. Many states require special alcohol training for employees, a potentially costly and time-consuming endeavor for fast-feeders relying on part-time help. Further complicating matters, local licensing rules make it nearly impossible for fast feeders to sell booze in some places."**
>
> *Advertising Age*, 5/21/12

86.5 Nonalcoholic Cocktails

Considering that 70% of adults consume alcoholic beverages less than once per week and 35% are total abstainers, most casual- and fine-dining restaurants are overlooking a huge opportunity by offering only a limited selection of nonalcoholic beverages to their patrons.

In a 2012 survey by Technomic, 29% of adults said they like to try new and unique beverages offered at restaurants; 47% of those in the 18-to-24 age demographic indicated this interest.

“Innovative operators are creating value by crafting new and unique beverages including specialty lemonades, handmade sodas, and ‘mocktails’ that are uniquely flavorful, fresh and a better-for-you option.”

Darren Tristano, Executive V.P.
Technomic, 9/24/12

The following are examples of restaurants and bars that have reported success with more sophisticated non-alcoholic drink options:

- Lark Creek Restaurant Group, in Southern California, serves at least three or four Zero Proof beverages with fresh and creative ingredients at each of its 12 locations.
- Obika Mozzarella Bar, with restaurants in Los Angeles and New York City, offers three, $6, spirit-free options at the top of its cocktail list: The Gingerella, a mix of lemon, pineapple, orange, grenadine and ginger ale; and the California Crisp made with lemon, lime and pomegranate juice.
- The menu at Island Creek Oyster Bar, in Boston, includes Abstain, a section of specialty non-alcoholic cocktails which are updated every two weeks. Ten percent (10%) of patrons order Abstain drinks.
- The three restaurants at Mayflower Park Hotel, in Seattle, have experienced an increase in sales of nonalcoholic options in the last two years.
- Michael’s Genuine Food and Drink, in Miami, reports a 24% increase in servings of nonalcoholic cocktails over the past two years.
- Roy’s Hawaiian Fusion Cuisine offers a selection of fresh-ingredient-based nonalcoholic cocktails at each of its 31 locations.
- Havana Central, a Cuban restaurant chain in New York City, makes lemonade to order, mixing the customers’ choice of fruit purée with the juice of 1½ lemons, agave nectar, and water. The chain sells about 40,000 of the drinks annually at each of its three locations; the cost is $5.
- The house-made soda program at Miller Union, in Atlanta, focuses on local products and natural ingredients. The selection varies depending on what ingredients are at hand.

"Basically whatever the pastry chef is using is probably what I'm going to be using. Recently that has meant rhubarb-lemon and cucumber-mint sodas. But I get more experimental sometimes, such as with a fig-and-balsamic-vinegar soda."

Stuart White, Mixologist
Miller Union
Nation's Restaurant News, 5/28/12

86.6 Happy Hours

While the popularity of happy hours declined during the economic downturn, many bars and restaurants ramped up their after-work offerings in 2012.

"Happy hours are here again. A growing number of casual-dining operators are discovering that beefed-up happy hours can boost traffic and provide a financial bright spot in their sales mix."

Nation's Restaurant News, 4/30/12

A 2012 survey by Technomic found that customers find the following happy hour specials most appealing (percentage of respondents indicating option is somewhat or very appealing):

- 50% off any drink: 90%
- Two drinks for the price of one: 88%
- Line-priced classic cocktails: 73%
- Discounted pitchers: 69%
- Inexpensive specialty drinks: 68%
- Inexpensive bottles of beer: 64%

- Inexpensive draft beer: 62%
- Discounted glasses of wine: 52%

Given a choice, 58% of men and 55% of women said they prefer happy hour on Friday; Wednesday rated as the second most preferred day for the activity. While happy hours are rarely offered on weekends, Technomic found that 64% of respondents said they would patronize a Saturday happy hour if one were offered.

86.7 Beverage-Only Restaurant Occasions

Consumers ordering beverages without food represent an increasing percentage of restaurant traffic, and the occasions occur throughout the day. The NPD Group reported that for the 12-month period ending June 2012 total restaurant visits were flat whereas visits that included both food and beverage declined by 2%.

> **"As consumers manage restaurant checks by cutting back on beverages and ordering food-only at main meals, restaurant chains are driving incremental beverage-only occasions at other times during the day through the introduction of new beverages and beverage marketing efforts."**
>
> The NPD Group, 11/12/12

Beverage-only foodservice occasions steadily increase during the morning, peak between 1:00 p.m. and 3:00 p.m., and then gradually taper off through the late afternoon and evening hours. Shakes, smoothies, slushy drinks, coffee, and bottled water are among the beverages more likely to be consumed at a restaurant occasion that doesn't include food.

PART IX: AWARD WINNERS

87

BEST NEW CHEFS

87.1 Overview

Food & Wine recognizes 10 Best New Chefs annually. To qualify, chefs much have run a kitchen for no longer than five years.

87.2 Award Winners 2012

Announced in the July 2012 issue of *Food & Wine*, the following were recognized as the Best New Chefs of 2012:

- Erik Anderson and Josh Habiger (The Catbird Seat; Nashville, TN)
- Danny Grant (RIA at the Waldorf Astoria; Chicago, IL)
- Dan Kluger (ABC Kitchen; New York, NY)
- Corey Lee (Benu; San Francisco, CA)
- Jenn Louis (Lincoln and Sunshine Tavern; Portland, OR)
- Cormac Mahoney (Madison Park Conservatory; Seattle, WA)
- Bryant Ng (The Spice Table; Los Angeles, CA)
- Karen Nicolas (Equinox: Washington, DC)
- Rich Torrisi and Mario Carbone (Torrisi Italian Specialties; New York, NY)
- Blaine Wetzel (Willows Inn; Lummi Island, WA)

87.3 Recent Award Winners

Food & Wine recognized the following as the Best New Chefs in recent years:

2011

- Jason Franey (Canlis; Seattle, WA)
- Bryce Gilmore (Barley Swine; Austin, TX)
- Stephanie Izard (Girl & the Goat; Chicago, IL)
- James Lewis (Bettola; Birmingham, AL)
- Carlo Mirarchi (Roberta’s; New York, NY)
- George Mendes (Aldea; New York, NY)
- Viet Pham & Bowman Brown (Forage; Salt Lake City, UT)
- Joshua Skenes (Saison; San Francisco, CA)
- Kevin Willmann (Farmhaus; St. Louis, MO)
- Ricardo Zarate (Mo-Chica; Los Angeles, CA)

2010

- Roy Choi (Kogi Korean BBQ; Los Angeles, CA)
- Matt Lightner (Castagna; Portland, OR)
- Clayton Miller (Trummers On Main; Clifton, VA)
- Missy Robbins (A Voce; New York, NY)
- Jonathon Sawyer (The Greenhouse Tavern; Cleveland, OH)
- Alex Seidel (Fruition; Denver, CO)
- Mike Sheerin (Blackbird; Chicago, IL)
- John Shields (Town House; Chilhowie, VA)
- Jason Stratton (Spinasse; Seattle, WA)
- James Syhabout (Commis; Oakland, CA)

2009

- Nate Appleman (A16; San Francisco, CA)
- Bryan Caswell (Reef; Houston, TX)
- Kelly English (Iris; Memphis, TN)
- Mark Fuller (Spring Hill; Seattle, WA)
- Linton Hopkins (Restaurant Eugene; Atlanta, GA)
- Christopher Kostow (Meadowood; St. Helena, CA)
- Paul Liebrandt (Corton; New York, NY)
- Barry Maiden (Hungry Mother; Cambridge, MA)
- Naomi Pomeroy (Beast; Portland, OR)
- Jon Shook and Vinny Dotolo (Animal; Los Angeles, CA)

2008

- Jim Burke (James; Philadelphia, PA)
- Gerard Craft (Niche; St. Louis, MO)
- Tim Cushman (O Ya; Boston, MA)
- Jeremy Fox (Ubuntu; Napa, CA)
- Koren Grieveson (Avec; Chicago, IL)
- Michael Psilakis (Anthos; New York, NY)
- Ethan Stowell (Union; Seattle, WA)
- Giuseppe Tentori (Boka; Chicago, IL)
- Eric Warnstedt (Hen of the Wood; Waterbury, VT)
- Sue Zemanick (Gautreau’s; New Orleans, LA)

2007

- April Bloomfield (The Spotted Pig; New York, NY)
- Gabriel Bremer (Salts; Cambridge, MA)
- Steve Corry (Five Fifty-Five; Portland, ME)
- Matthew Dillon (Sitka & Spruce; Seattle, WA)
- Gavin Kaysen (El Bizcocho; San Diego, CA)
- Johnny Monis (Komi; Washington, DC)
- Sean O’Brien (Myth; San Francisco, CA)

- Gabriel Rucker (Le Pigeon; Portland, OR)
- Ian Schnoebelen (Iris; New Orleans, LA)
- Paul Virant (Vie; Western Springs, IL)

2006

- Cathal Armstrong (Restaurant Eve; Alexandria, VA)
- Jonathan Benno (Per Se; New York, NY)
- Michael Carlson (Schwa Restaurant; Chicago, IL)
- David Chang (Momofuku; New York, NY)
- Mary Dumont (Dunaway Restaurant at Strawberry Banke; Portsmouth, NH)
- Douglas Keane (Cyrus; Healdsburg, CA)
- Christopher Lee (Striped Bass; Philadelphia, PA)
- Pino Maffeo (Restaurant L; Boston, MA)
- Jason Wilson (Crush; Seattle, WA)
- Stewart Woodman (Five Restaurant & Street Lounge; Minneapolis, MN)

88

BEST NEW RESTAURANTS

88.1 Lists For 2012

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

Bon Appétit (August 2012)

- Bäco Mercat (Los Angeles, CA)
- Battersby (Brooklyn, NY)
- Blanca (Brooklyn, NY)
- Cakes & Ale Restaurant (Decatur, GA)
- Little Serow (Washington, DC)
- Luce (Portland, OR)
- Oxheart (Houston, TX)
- State Bird Provisions (San Francisco, CA)
- The Bachelor Farmer/Marvel Bar (Minneapolis, MN)
- The Catbird Seat (Nashville, TN)

Condé Nast Traveler (May 2012) - The World's Top Chefs Pick Their Favorite New Restaurant (U.S. only)

- A-Frame (Los Angeles, CA)
- Fatty Que (Brooklyn and New York, NY)
- Isa (New York, NY)
- Picca (Los Angeles, CA)
- Red Medicine (Los Angeles, CA)
- So of a Gun (Los Angeles, CA)
- Tertulia (New York, NY)
- The Dutch (New York, NY)

Esquire (October 2012)

- AQ (San Francisco, CA)
- Bäco Mercat (Los Angeles, CA)
- Barrio Queen (Scottsdale, AZ)
- Bierbeisl (Beverly Hills, CA)
- Campo (Reno, NV)
- Carter's Kitchen (Mount Pleasant, SC)
- ELM (New Canaan, CT)
- Gusto (Los Angeles, CA)

- Gwynnett St. (Brooklyn, NY)
- Sbraga (Philadelphia, PA)
- Sobou (New Orleans, LA)
- State Bird Provisions (San Francisco, CA)
- The Macintosh (Charleston, SC)
- The Optimist (Atlanta, GA)
- The Southern Steak & Oyster (Nashville, TN)
- Underbelly (Houston, TX)

GQ (February 2012)
- Barley Swine (Austin, TX)
- Brushstroke (New York, NY)
- Ink (Los Angeles, CA)
- Mica (Philadelphia, PA)
- Mission Chinese Food (San Francisco, CA)
- Next (Chicago, IL)
- Picca (Los Angeles, CA)
- Ruxbin (Chicago, IL)
- The Catbird Seat (Nashville, TN)
- The Woodsman Tavern (Portland, OR)

James Beard Foundation (May 2012)
- Next (Chicago, IL): Winner
- Altura (Seattle, WA)
- AQ (San Francisco, CA)
- The Bachelor Farmer (Minneapolis, MN)
- Bistronomic (Chicago, IL)
- Fiola (Washington, DC)
- Harvest (Louisville, KY)
- Isa (New York, NY)
- Little Serow (Washington, DC)
- MB Post (Manhattan Beach, CA)
- Ollie Irene (Mountain Brook, AL)
- Park Tavern (San Francisco, CA)
- Petite Jacqueline (Portland, ME)
- Picca (Los Angeles, CA)
- Pistou (Burlington, VT)
- Pondicheri (Houston, TX)
- Restaurant 1833 (Monterey, CA)
- Salt (St. Louis, MO)
- ShinBay (Scottsdale, AZ)
- Tashan, Philadelphia
- Tertulia (New York, NY)
- The Catbird Seat (Nashville, TN)

- The Dorrance (Providence, RI)
- The Farm and Fisherman (Philadelphia, PA)
- The Macintosh (Charleston, SC)
- Trade (Boston, MA)
- Tremont, (New York, NY)
- Yardbird Southern Table & Bar (Miami Beach, FL)
- Zeppoli (Collingswood, NJ)

89

BENCHMARK AWARDS

89.1 Overview

Since 2007, *Cheers* has presented annual Benchmark Awards to bars in three categories: Best Beer Program, Best Cocktail Program, and Best Wine Program. The awards recognize comfortable ambiance, a strong drink program, stellar service, and hospitality.

89.2 Award Winners 2012

Cheers Benchmark Awards for 2012 are as follows:

Best Beer Bar
- Alewife Queens (Long Island City, NY)

Best Cocktail Lounge
- Cure (New Orleans, LA)

Best Wine Bar
- Max's Wine Dive (Houston, TX)

89.3 Recent Award Winners

Winners since the launch of the Benchmark Awards are as follows:

Best Beer Bar
- 2011: Birch & Barley (Washington, DC)
- 2010: Belga Cafe (Washington, DC)
- 2009: Blind Tiger Ale House (New York, NY)
- 2008: Great Lost Bear (Portland, ME)
- 2007: Brickskeller Dining House & Down Home Saloon (Washington, DC)

Best Cocktail Lounge
- 2011: Mercadito (Chicago, IL)
- 2010: Rickhouse (San Francisco, CA)
- 2009: Sepia (Chicago, IL)
- 2008: Pegu Club (New York, NY)
- 2007: Cuba Libre Restaurant & Rum Bar (Atlantic City, NJ and Philadelphia, PA)

Best Wine Bar

- 2011: Summit at the Broadmoor (Colorado Springs, CO)
- 2010: BOKA Kitchen and Bar (Seattle, WA)
- 2009: Ottimista Enoteca-Café, San Francisco, CA)
- 2008: Madison & Vine (New York, NY)
- 2007: DW's Restaurant at David Walley's Resort, Hot Springs & Spa (Genoa, NV)

90

BEVERAGE EXCELLENCE AWARDS

90.1 Overview

The *Cheers* Beverage Excellence Awards recognize innovation, creativity, and bottom-line effectiveness in the development of on-premise beverage programs.

Awards are presented at the annual Cheers Beverage Conference in February.

90.2 Award Winners 2013

Best Chain Overall Beverage Program
- Hard Rock Cafe

Best Chain Adult Alcohol-Free Program
- Red Lion Hotels Corp.

Best Chain Bar-Kitchen Synergy
- InterContinental Hotels Group

Best Chain Beer Program
- Ruby Tuesday

Best Chain Beverage Merchandising
- Carrabba's Italian Grill

Best Chain Drink Program
- Omni Hotels & Resorts

Best Chain Hotel Beverage Program
- J.W. Marriott San Antonio Hill Country

Best Chain Multi-Concept Beverage Program
- Walt Disney Parks & Resorts

Best Chain Signature Drink Program
- Tavistock Restaurants

Best Chain Spirits Program
- Celebrity Cruises

Best Chain Wine Program
- Sheraton Hotels & Resorts

Beverage Industry Innovator of the Year
- Tippling Brothers

Best Staff Training Program
- Marriott International

Raising the Bar Award
- Kip Snider, director of beverage: Yard House Restaurants

90.3 Award Winners 2012

Best Chain Overall Beverage Program
- P.F. Chang's China Bistro

Best Chain Beer Program
- Rusty Bucket Restaurant & Tavern (Cameron Mitchell Group)

Best Chain Beverage Merchandising
- Quaker Steak & Lube

Best Chain Drink Program
- Ruby Tuesday

Best Chain Hotel Beverage Program
- The Broadmoor

Best Chain Multi-Concept Beverage Program
- Walt Disney Parks & Resorts

Best Chain Signature Drink Program
- Omni Hotels & Resorts

Best Chain Spirits Program
- Fairmont Hotels & Resorts

Best Chain Wine Program
- Fleming's Prime Steakhouse

Best Staff Training Program
- Rusty Bucket Restaurant & Tavern/Cameron Mitchell

90.4 Award Winners 2011

Best Chain Overall Beverage Program
- Bar Louie

Best Chain Adult Alcohol-Free Program
- Ruby Tuesday

Best Chain Beer Program
- Yard House

Best Chain Beverage Menu
- McCormick & Schmick's Seafood Restaurants

Best Chain Beverage Merchandising
- Westin Hotels

Best Chain Drink Program
- Ram International

Best Chain Hotel Beverage Program
- Royal Caribbean International

Best Chain Multi-Concept Beverage Program
- The Cheesecake Factory

Best Chain Signature Drink Program
- The Phoenician Resort

Best Chain Spirits Program
- Ocean Prime Restaurant

Best Chain Wine Program
- P.F. Chang's China Bistro

91

CHAIN RESTAURANT CONSUMERS' CHOICE AWARDS

91.1 Overview

Technomic (www.technomic.com) presents annual Chain Restaurant Consumers' Choice Awards.

The inaugural awards, presented in January 2013, were based on surveys following 80,000 restaurant visits where consumers rated 115 restaurant chains on more than 60 different attributes.

91.2 Award Winners 2013

Service

- Quick-service: Chick-fil-A
- Fast-casual: Firehouse Subs
- Full-service: Outback Steakhouse

Food & Beverage

- Quick-service: Culver's
- Fast-casual: McAlister's Deli
- Full-service: Cracker Barrel Old Country Store

Atmosphere

- Quick-service: Caribou Coffee
- Fast-casual: Panera Bread Co.
- Full-service: LongHorn Steakhouse

Brand Image

- Quick-service: Jamba Juice
- Fast-casual: Qdoba Mexican Grill
- Full-service: Red Robin Gourmet Burgers

91.3 Market Resources

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

92

CONSUMER PICKS

92.1 Overview

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

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

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

The results of the survey, based on ratings of 171 restaurant chain brands, were published by *Nation's Restaurant News* in August 2012 and presented online at http://nrn.com/industry-data/consumer-picks. The top ranked brands are summarized in this chapter.

92.2 Favorites By Segment

The top five restaurant brands by segment were as follows:

Casual-Dining

1. The Cheesecake Factory
2. P.F. Chang's China Bistro
3. Bonefish Grill
4. Olive Garden
5. Carabba's Italian Grill

Limited-Service
1. Marble Slab Creamery
2. Papa Murphy’s Take ‘N’ Bake
3. In-N-Out Burger
4. Ben & Jerry’s
5. Chick-fil-A

Family-Dining
1. Cracker Barrel Old Country Store
2. Marie Callender’s
3. Bob Evans Restaurants
4. The Original Pancake House
5. IHOP

92.3 Favorites By Demographic

By demographic, the following brands received the highest overall scores:

Casual-Dining

• Women:	The Cheesecake Factory
• Men:	P.F. Chang’s China Bistro
• Millenials:	Bonefish Grill
• Generation X:	P.F. Chang’s China Bistro
• Baby Boomers:	BJ’s Restaurant & Brewhouse
• Seniors:	The Cheesecake Factory
• Income less than $25,000:	The Cheesecake Factory
• Income $25,000 to $49,999:	The Cheesecake Factory
• Income $50,000 to $74,999:	BJ’s Restaurant & Brewhouse
• Income $75,000 to $100,000:	Bucca di Beppo
• Income higher than $100,000:	Mellow Mushroom Pizza Bakers

Limited-Service

• Women:	Marble Slab Creamery
• Men:	Potbelly Sandwich Works
• Millenials:	In-N-Out Burger
• Generation X:	Marble Slab Creamery
• Baby Boomers:	Marble Slab Creamery
• Seniors:	Papa Murphy’s Take ‘N’ Bake Pizza
• Income less than $25,000:	Souplantation/Sweet Tomatoes
• Income $25,000 to $49,999:	Marble Slab Creamery
• Income $50,000 to $74,999:	In-N-Out Burger
• Income $75,000 to $100,000:	Papa Murphy’s Take ‘N’ Bake Pizza
• Income higher than $100,000:	Bruster’s Real Ice Cream

92.4 Market Resources

WD Partners, 1201 Dublin Road, Columbus, OH 43215. (614) 221-0840. (www.wdpartners.com)

93

CUSTOMER SATISFACTION

93.1 Overview

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

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

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

93.2 ACSI Scores

The ACSI scores for restaurant sectors have been as follows:

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

93.3 Customer Satisfaction Scores

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

Full-Service Restaurants

- Red Lobster: 83 (1.2%)
- Outback Steakhouse: 81 (no change)
- Olive Garden: 80 (-2.4%)
- Appleebee's: 77 (n/a)

- Chili's Bar & Grill: 76 (-3.8%)
- All others: 81 (-1.2%)
- Sector average: 80 (-2.4%)

Limited-Service Restaurants
- Papa John's: 83 (5.1%)
- Subway: 82 (n/a)
- Little Caesar: 82 (2.5%)
- Dunkin' Donuts: 79 (n/a)
- Pizza Hut: 78 (-3.7%)
- Wendy's: 78 (1.3)
- Domino's Pizza: 77 (no change)
- Taco Bell: 77 (1.3%)
- Starbucks: 76 (-5.0%)
- KFC: 75 (no change)
- Burger King: 75 (no change)
- McDonald's: 73 (1.4%)
- All others: 83 (5.1%)
- Sector average: 80 (1.3%)

93.4 Market Resources

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

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

94

DINERS' CHOICE AWARDS

94.1 Overview

Based on annual surveys of registered users, Open Table (www.opentable.com) designates Diners' Choice Awards in several categories. The awards are based on responses from a Dining Feedback Form provided to each party making reservations through Open Table.

Diners' Choice Awards are designated in the following categories:

- Best Restaurant
- Best Service
- Brunch
- Fit for Foodies Restaurants
- Hot Spots
- Kid-Friendly Restaurants
- Late-Night Dining
- Most Notable Wine Lists
- Most Romantic Restaurants
- Most Scenic Views
- Outdoor Dining
- Top American Cuisine

94.2 Best Restaurant

The following are the winners of the 2012 Diners' Choice Award for Best Overall Restaurant:

- Acquerello (San Francisco, CA)
- Addison at The Grand Del Mar (San Diego, CA)
- Altura (Seattle, WA)
- Andrea at Pelican Hill (Newport Coast, CA)
- Annisa (New York, NY)
- Artisanal Restaurant (Banner Elk, NC)
- Atelier Crenn (San Francisco, CA)
- Auberge du Soleil (Rutherford, CA)
- Bacchanlia (Atlanta, GA)
- Bibou (Philadelphia, PA)
- Binkley's Restaurant (Cave Creek, AZ)

- Bistro L'Hermitage (Woodbridge, CA)
- Blue Hill at Stone Barns (Pocantico Hills, NY)
- Bouchard Restaurant and Inn (Newport, RI)
- Bouley (New York, NY)
- Cafe Provence (Prairie Village, KS)
- Cafe Renaissance (Vienna, VA)
- Canlis (Seattle, WA)
- Capital Grille (Kansas City, MO)
- Capital Grille (Minneapolis, MN)
- Carpe Vino (Auburn, CA)
- Castle Hill Inn (Newport, RI)
- Chachama Grill (East Patchogue, NY)
- Charleston (Baltimore, MD)
- Charleston Grill (Charleston, SC)
- Chez Francois (Vermilion, OH)
- Chez Nous French Restaurant (Humble, TX)
- CityZen (Washington, DC)
- Commis (Oakland, CA)
- Cottage Place Restaurant (Flagstaff, AZ)
- Daniel (New York, NY)
- Daniel - Lounge Seating (New York, NY)
- Del Posto (New York, NY)
- Eleven Madison Park (New York, NY)
- Farmhouse Inn & Restaurant (Forestville, CA)
- Fearrington House Restaurant (Pittsboro, NC)
- Fountain Restaurant (Philadelphia, PA)
- Geronimo (Santa Fe, NM)
- Gracie's (Providence, RI)
- Gramercy Tavern (New York, NY)
- Hannas Prime Steak (Rancho Santa Margarita, CA)
- Jean Georges (New York, NY)
- Joseph Tambellini (Pittsburgh, PA)
- Jungsik (New York, NY)
- Kai - Sheraton Wild Horse Pass Resort (Chandler, AZ)
- Keiko à Nob Hill (San Francisco, CA)
- King Umberto Restaurant (Elmont, NY)
- La Ciccia (San Francisco, CA)
- La Folie (San Francisco, CA)
- La Grenouille (New York, NY)
- L'Auberge Chez Francois (Great Falls, VA)
- Le Bernardin (New York, NY)
- Le Vallauris (Palm Springs, CA)
- Le Yaca (Williamsburg, CA)
- L'Espalier (Boston, MA)

- Mama’s Fish House (Paia, HI)
- Manresa (Los Gatos, CA)
- Marcel’s (Washington, DC)
- Marinus - Bernardus Lodge (Carmel Valley, CA)
- Menton (Boston, MA)
- Michael’s - South Point Casino (Las Vegas, NV)
- n/naka (Los Angeles, CA)
- NAOE (Miami, FL)
- Nicholas (Red Bank, NJ)
- Norman’s at the Ritz-Carlton Orlando (Orlando, FL)
- o ya (Boston, MA)
- ON20 (Hartford, CT)
- Orchids at Palm Court (Cincinnati, OH)
- Palace Arms at the Brown Palace (Denver, CO)
- Per Se (New York, NY)
- Perry Street Brasserie (Galena, IL)
- Providence (Los Angeles, CA)
- Restaurant Alma (Minneapolis, MN)
- Restaurant Iris (Memphis, TN)
- Rover’s (Seattle, WA)
- Rudy & Paco Restaurant & Bar (Galveston, TX)
- Saint Jacques French Cuisine (Raleigh, NC)
- Saison (San Francisco, CA)
- Scalini Fedeli (New York, NY)
- ShinBay (Scottsdale, AZ)
- Sonoma (Princeton, MA)
- Splendido (Beaver Creek, CO)
- Studio at Montage Laguna Beach (Los Angeles, CA)
- The Ashby Inn (Paris, VA)
- The Belvedere (Beverly Hills, CA)
- The French Laundry (Yountville, CA)
- The French Room (Dallas, TX)
- The Goodstone Inn & Estate Restaurant (Middleburg, VA)
- The Hobbit (Orange, CA)
- The Kitchen Restaurant (Sacramento, CA)
- The Loft at Montage Laguna Beach (Laguna Beach, CA)
- The Modern - Dining Room (New York, NY)
- The North Fork Table & Inn (Southold, NY)
- The Painted Lady (Newberg, OR)
- Tony’s (St. Louis, MO)
- Vetri (Philadelphia, PA)
- VOLT (Frederick, MD)
- Woodfire Grill (Atlanta, GA)

94.3 Best Service

The following are the winners of the 2012 Diners' Choice Award for Best Service:

- Acqua Restaurant & Wine Bar (White Bear Lake, MN)
- Acquerello (San Francisco, CA)
- Addison at The Grand Del Mar (San Diego, CA)
- Bacchanalia (Atlanta, GA)
- Bibou (Philadelphia, PA)
- Binkley's Restaurant (Cave Creek, AZ)
- Bistro L'Hermitage (Woodbridge, VA)
- Blue Hill at Stone Barns (Pocantico Hills, NY)
- Bluestem (Kansas City, MO)
- Bones (Atlanta, GA)
- Cafe Renaissance (Vienna, VA)
- Canlis (Seattle, WA)
- Capital Grille - Minneapolis (Minneapolis, MN)
- Castagna (Portland, ME)
- Chama Gaucha Brazilian Steakhouse (Downers Grove, IL)
- Charleston (Baltimore, MD)
- Charleston Grill (Charleston, SC)
- Chez Francois (Vermilion, OH)
- Chez Nous French Restaurant (Humble, TX)
- CityZen (Washington, DC)
- Congress (Austin, TX)
- Corbett's Fine Dining (Louisville, KY)
- Cyrus (Healdsburg, CA)
- Daniel (New York, NY)
- Daniel - Lounge Seating (New York, NY)
- Del Posto (New York, NY)
- Dewz (Modesto, CA)
- Eleven Madison Park (New York, NY)
- Elizabeth on 37th (Savannah, GA)
- Farmhouse Inn & Restaurant (Forestville, CA)
- Fat Canary (Williamsburg, VA)
- Fearrington House Restaurant (Pittsboro, NC)
- Fig Tree (Charlotte, NC)
- Forage (Salt Lake City, UT)
- Fountain Restaurant (Philadelphia, PA)
- Frasca Food and Wine (Boulder, CO)
- Genoa Restaurant (Portland, OR)
- Gordon Ramsay at the London (New York, NY)
- Grouse Mountain Grill (Avon, CO)
- Halls Chophouse (Charleston, SC)
- Hannas Prime Steak (Rancho Santa Margarita, CA)
- Herons (Cary, NC)

- Highlands Bar & Grill (Birmingham, AL)
- joan's in the Park (Saint Paul, MN)
- Kai - Sheraton Wild Horse Pass Resort (Chandler, AZ)
- Killen's Steakhouse (Pearland, TX)
- La Belle Vie (Minneapolis, MN)
- La Grenouille (New York, NY)
- La Mer at Halekulani (Honolulu, HI)
- L'Auberge Chez Francois (Great Falls, VA)
- Le Bernardin (New York, NY)
- Les Nomades (Chicago, IL)
- L'Etoile Restaurant (Madison, WI)
- Madrona Manor (Healdsburg, CA)
- Mahogany Prime Omaha (Omaha, NE)
- Marcel's (Washington, DC)
- Menton (Boston, MA)
- Michael's - South Point Casino (Las Vegas, NV)
- Mitchell's Ocean Club - Easton Town Center (Columbus, OH)
- Morton's The Steakhouse - Portland (Portland, OR)
- Niche (St. Louis, MO)
- Nicholas (Red Bank, NJ)
- o ya (Boston, MA)
- Opus 9 Steakhouse (Williamsburg, VA)
- Orchids at Palm Court - Hilton Cincinnati Netherland Plaza (Cincinnati, OH)
- Palace Arms at the Brown Palace (Denver, CO)
- Peninsula Grill (Charleston, SC)
- Pepper Tree Restaurant (Colorado Springs, CO)
- Per Se (New York, NY)
- Plume at the Jefferson Hotel (Washington, DC)
- Rafain Brazilian Steakhouse (Dallas, TX)
- Restaurant Iris (Memphis, TN)
- Rover's (Seattle, WA)
- Rudy & Paco Restaurant & Bar (Galveston, TX)
- Russell's Steaks, Chops, and More (Williamsville, NY)
- Ruth's Chris Steak House - Jacksonville (Jacksonville, FL)
- Saint Jacques French Cuisine (Raleigh, NC)
- Sedgley Place (Greene, ME)
- Sonoma (Princeton, MA)
- St. John's Restaurant (Chattanooga, TN)
- The Copper Door (Hayesville, NC)
- The Dining Room - Biltmore Estate (Asheville, NC)
- The French Room (Dallas, TX)
- The Grill - The Ritz-Carlton (Naples, FL)
- The Hobbit (Orange, CA)
- The Kitchen Restaurant (Sacramento, CA)

- The Melting Pot - Myrtle Beach (Myrtle Beach, SC)
- The Painted Lady (Newberg, OR)
- The Restaurant at Meadowood (Saint Helena, CA)
- The Steak House at Silver Reef (Ferndale, WA)
- Tony's - St. Louis (St. Louis, MO)
- TRU (Chicago, IL)
- Uchi (Austin, TX)
- Vetri (Philadelphia, PA)
- Vic & Anthony's Steakhouse (Las Vegas, NV)
- Vintage Tavern (Suffolk, VA)
- White Barn Inn (Kennebunkport Beach, ME)
- Woodfire Grill (Atlanta, GA)

94.4 Brunch

The following are the winners of the 2012 Diners' Choice Award for Best Brunch:

- 56th Fighter Group (East Farmingdale, NY)
- 94th Aero Squadron (Miami, FL)
- 94th Aero Squadron (San Diego, CA)
- 94th Aero Squadron (Van Nuys, CA)
- 100th Bomb Group (Cleveland, OH)
- Allgauer's (Lisle, IL)
- Ana Beall's Tea Room (Westfield, NJ)
- B Matthews Eatery (Savannah, GA)
- Back Bay Bistro (Newport Beach, CA)
- Bananas Modern American Diner (Orlando, FL)
- Bedford Post - The Barn (Bedford, NY)
- Belga Cafe (Washington, DC)
- Big Jones (Chicago, IL)
- Biltmore Brunch (Coral Gables, FL)
- Bixby's (St. Louis, MO)
- BLD (Los Angeles, CA)
- Brady's Landing (Houston, TX)
- Broadway Cellars (Chicago, IL)
- Brockton Villa (La Jolla, CA)
- Buttons Food and Music (Forth Worth, TX)
- Cafe Fleuri (Boston, MA)
- Cafe Modern (Fort Worth, TX)
- Cafe Monte (Charlotte, NC)
- Capitol Garage (Sacramento, CA)
- Castaway (Burbank, CA)
- Chez Zee (Austin, TX)
- Cookshop (New York, NY)
- Cooperage Inn Restaurant (Baiting Hollow, NY)

- Cupping Room Cafe (New York, NY)
- Deerfield (Newark, DE)
- Einstein’s (Atlanta, GA)
- Ellyngton’s at the Brown Palace (Denver, CO)
- Essex (New York, NY)
- FARMiCia (Philadelphia, PA)
- Fearrington Granary (Pittsboro, NC)
- Five Points (New York, NY)
- Friend of a Farmer (New York, NY)
- Garden Court (San Francisco, CA)
- Generations Restaurant (Media, PA)
- Gertrude’s at the Baltimore Museum of Art (Baltimore, MD)
- Grand Concourse (Pittsburgh, PA)
- Henry’s Restaurant (New York, NY)
- HS Lordships (Berkeley, CA)
- Humphreys Restaurant (San Diego, CA)
- Hundred Acres (New York, NY)
- Ironside (San Francisco, CA)
- Jane (New York, NY)
- Kelties Restaurant and Catering (Westfield, IN)
- La Note Restaurant Provencal (Berkeley, CA)
- Lake Elmo Inn (Lake Elmo, MN)
- L’Enfant Café & Bar (Washington, DC)
- Level One (Washington, DC)
- Lucile’s (Fort Worth, TX)
- LuLu’s (Richmond, VA)
- Luminarias (Monterey Park, CA)
- Madhatter (Washington, DC)
- Magic Flute (San Francisco, CA)
- Masa (Boston, MA)
- Mountain View Restaurant at Cheyenne Mountain Resort (Colorado Springs, CO)
- Mrs. K’s Toll House (Silver Spring, MD)
- Museum Cafe (Oklahoma City, OK)
- Norma’s at Le Parker Meridien (New York, NY)
- North End Cafe (Louisville, KY)
- Odyssey (Granada Hills, CA)
- Paradou (New York, NY)
- Parks Edge (Atlanta, GA)
- Parrot Cage - Washburne Culinary Institute (Chicago, IL)
- Pastis (New York, NY)
- Peacock Alley (New York, NY)
- Peackock Café (Washington, DC)
- Plumeria Beach House (Kahala, HI)
- Poco (New York, NY)

- Pond House Cafe (West Hartford, CT)
- Proud Bird (Los Angeles, CA)
- Queen Mary Champagne Sunday (Long Beach, CA)
- R Gang Eatery (San Diego, CA)
- Rosebud (Atlanta, GA)
- Salty's on Alki (Seattle, WA)
- Sanfords Restaurant (Astoria, NY)
- Sarabeth's Central Park South (New York, NY)
- Sarabeth's East (New York, NY)
- Sarabeth's TriBeCa (New York, NY)
- Sarabeth's West (New York, NY)
- Shanghai Red's (Marina Del Rey, CA)
- South End Buttery (Boston, MA)
- Styer's Garden Cafe (Glen Mills, PA)
- Sundy House (Delray Beach, FL)
- Tap Room - Hotel Bethlehem (Bethlehem, PA)
- TART Restaurant & Farmer's Daughter Hotel (Los Angeles, CA)
- Ted's Bulletin (Washington, DC)
- The Bistro at Childress Vineyards (Lexington, NC)
- The Dining Room at Salish Lodge & Spa (Snoqualmie, WA)
- The Farm of Beverly Hills (Beverly Hills, CA)
- The Front Page (Washington, DC)
- The Reef (Long Beach, CA)
- The Roycroft Inn (East Aurora, NY)
- The Smith (New York, NY)
- Tom Hams Lighthouse (San Diego, CA)
- Top of the Mark (San Francisco, CA)
- Town's End Restaurant (San Francisco, CA)
- Valley Green Inn (Philadelphia, PA)

94.5 Fit For Foodies Restaurants

The following are the winners of the 2012 Diners' Choice Award for the top Fit for Foodies Restaurant:

- Abattoir (Atlanta, GA)
- Acadia (Chicago, IL)
- Ad Hoc (Yountville, CA)
- Altura (Seattle, WA)
- Annisa (New York, NY)
- Atelier Crenn (San Francisco, CA)
- Aviary (Portland, OR)
- Beast (Portland, OR)
- Benu (San Francisco, CA)
- Bibou (Philadelphia, PA)

- Blackbird (Chicago, IL)
- bresca (Portland, ME)
- Camino (Oakland, CA)
- Canteen (San Francisco, CA)
- Cascina Spinasse (Seattle, WA)
- Castagna (Portland, OR)
- Central Kitchen (San Francisco, CA)
- Cochon (New Orleans, LA)
- Commis (Oakland, CA)
- Commonwealth (San Francisco, CA)
- Cotogna (San Francisco, CA)
- Craigie on Main (Cambridge, MA)
- Cube Cafe and Marketplace (Los Angeles, CA)
- Dirt Candy (New York, NY)
- East by Northeast (Cambridge, MA)
- Ela (Philadelphia, PA)
- Eola (Washington, DC)
- Farmhouse Inn & Restaurant (Forestville, CA)
- FIG (Charleston, SC)
- Flour + Water (San Francisco, CA)
- Fond (Philadelphia, PA)
- Forage (Salt Lake City, UT)
- Frances (San Francisco, CA)
- Girl & the Goat (Chicago, IL)
- Golden Beetle (Seattle, WA)
- goosefoot (Chicago, IL)
- Graham Elliot (Chicago, IL)
- Gruner (Portland, OR)
- Gwynnett St (Brooklyn, NY)
- Haven (Oakland, CA)
- How to Cook A Wolf (Seattle, WA)
- Hugo's Restaurant (Portland, ME)
- Hungry Mother (Cambridge, MA)
- iNG Restaurant (Chicago, IL)
- ink. (Los Angeles, CA)
- Kin Shop (New York, NY)
- Le Pigeon (Portland, OR)
- Little Bird (Portland, OR)
- Little Fish (Philadelphia, PA)
- Local Mission Eatery (San Francisco, CA)
- Lula Cafe (Chicago, IL)
- Mezze (Los Angeles, CA)
- Miller Union (Atlanta, GA)
- Mistral Kitchen (Seattle, WA)

- Moto Restaurant (Chicago, IL)
- Natural Selection (Portland, OR)
- Ned Ludd (Portland, OR)
- Nobuo at Teeter House (Phoenix, AZ)
- Park Kitchen (Portland, OR)
- Piccolo (Minneapolis, MN)
- Ping Restaurant (Portland, OR)
- Playa (Los Angeles, CA)
- Plum (Oakland, CA)
- Poppy (Seattle, WA)
- Posh (Scottsdale, AZ)
- Range (San Francisco, CA)
- Red Medicine (Los Angeles, CA)
- Restaurant Alma (Minneapolis, MN)
- Restaurant Zoe (Seattle, WA)
- Russet (Philadelphia, PA)
- Rustic Canyon Wine Bar (Santa Monica, CA)
- Saffron Restaurant & Lounge (Minneapolis, MN)
- Saison (San Francisco, CA)
- Sbraga (Philadelphia, PA)
- Sons & Daughters (San Francisco, CA)
- Soto (New York, NY)
- SPOR (San Francisco, CA)
- Sprout (Chicago, IL)
- Spur Gastropub (Seattle, WA)
- Staple & Fancy Mercantile (Seattle, WA)
- Susan Feniger's STREET (Los Angeles, CA)
- Tabla Mediterranean Bistro (Portland, OR)
- Takashi (Chicago, IL)
- Tar & Roses (Santa Monica, CA)
- Terra Plata (Seattle, WA)
- The Bristol (Chicago, IL)
- The Farm and Fisherman (Forestville, CA)
- The Publican (Chicago, IL)
- The Refinery (Tampa, FL)
- The Spence (Atlanta, GA)
- The Squeaky Bean (Denver, CO)
- The Tasting Kitchen (Venice, CA)
- Tilth (Seattle, WA)
- Topolobampo (Chicago, IL)
- Twelve Restaurant (Denver, CO)
- Underbelly (Houston, TX)
- Vedge (Philadelphia, PA)
- Vernick Food & Drink (Philadelphia, PA)

- wd-50 (New York, NY)
- Woodfire Grill (Atlanta, GA)
- Zahav (Philadelphia, PA)

94.6 Hot Spots

The 2012 Diners' Choice Award for top Hot Spot (which recognizes hip restaurants, celebrity chefs, and avant-garde restaurateurs) are as follows:

- 25 Lusk (San Francisco, CA)
- Abe & Arthur's (New York, NY)
- Asellina Ristorante (New York, NY)
- B.B. King's Blues Club (Memphis, TN)
- Beaumarchais (New York, NY)
- Beauty and Essex (New York, NY)
- BOA Steakhouse - Sunset (Hollywood, CA)
- Bond Street Social (Baltimore, MD)
- Broadway by Amar Santana (Laguna Beach, CA)
- Buccan (Palm Beach, FL)
- Buddakan NY (New York, NY)
- Burlap (San Diego, CA)
- Campo (Reno, NV)
- Catch (New York, NY)
- Chino Latino (Minneapolis, MN)
- Cleo - SBE (Los Angeles, CA)
- CO-OP Food & Drink (New York, NY)
- Del Frisco's Grille - McKinney Ave. (Dallas, TX)
- Departure Restaurant and Lounge (Portland, OR)
- do Restaurant at the View (Atlanta, GA)
- Dragonfly at Hotel ZaZa (Dallas, TX)
- Drunken Fish (Kansas City, MO)
- Enso Asian Bistro & Sushi Bar (Charlotte, NC)
- Fig & Olive - Melrose Place (West Hollywood, CA)
- Geisha House - Hollywood (Hollywood, CA)
- Gilt Bar (Chicago, IL)
- Girl & the Goat (Chicago, IL)
- GT Fish and Oyster (Chicago, IL)
- HUB 51 (Chicago, IL)
- Imperial No. Nine (New York, NY)
- ink. (Los Angeles, CA)
- Jaleo - The Cosmopolitan of Las Vegas (Las Vegas, NV)
- Katana (West Hollywood, CA)
- Katsuya - Brentwood - SBE (Brentwood, CA)
- Katsuya - Hollywood - SBE (Los Angeles, CA)
- Katsuya - LA LIVE (Los Angeles, CA)

- Katsuya - SBE (Laguna Beach, CA)
- Koi (West Hollywood, CA)
- Lavo (Las Vegas, NV)
- Lavo - NYC (New York, NY)
- Linger (Denver, CO)
- Lost Society (Washington, DC)
- Lulu California Bistro (Palm Springs, CA)
- Manhattan Beach Post (Manhattan Beach, CA)
- Marble Lane (New York, NY)
- Maude's liquor bar (Chicago, IL)
- Meat Market (Miami Beach, FL)
- Mercadito (Chicago, IL)
- Mercato di Vetro (West Hollywood, CA)
- Mr. Chow - Beverly Hills (Beverly Hills, CA)
- Mr. Chow - Miami (Miami Beach, FL)
- N9NE Steakhouse Las Vegas (Las Vegas, NV)
- Nada (Cincinnati, OH)
- Nikko Japanese Restaurant (Charlotte, NC)
- Nisen (Woodbury, NY)
- Nobu Miami (Miami, FL)
- Paris Club (Chicago, IL)
- Picca (Los Angeles, CA)
- Prato (Winter Park, FL)
- Prime Italian (Miami Beach, FL)
- Private Social (Dallas, TX)
- Pump Room - Public Hotel (Chicago, IL)
- Red Ginger at Traverse City (Traverse City, MI)
- Red Lantern (Boston, MA)
- Red Rooster Harlem (New York, NY)
- Rocco's Tacos and Tequila Bar (West Palm Beach, FL)
- ROKA AKOR (Chicago, IL)
- Searsucker (San Diego, CA)
- Sino Restaurant & Lounge (San Jose, CA)
- STK - Los Angeles (West Hollywood, CA)
- STK - Miami (Miami, FL)
- STK - NYC - Meatpacking (New York, NY)
- STK - The Cosmopolitan of Las Vegas (Las Vegas, NV)
- Sugarcane raw bar grill (Miami, FL)
- Sunda (Chicago, IL)
- Sushi Samba dromo (Miami Beach, FL)
- Sushi Samba strip (Las Vegas, NV)
- Tao (New York, NY)
- Tao Restaurant and Nightclub (Las Vegas, NV)
- Tavernita (Chicago, IL)

- The Bazaar by José Andrés (Los Angeles, CA)
- The Darby (New York, NY)
- The Hurricane Club (New York, NY)
- The Lion (New York, NY)
- The Office (Delray Beach, FL)
- The Standard Grill (New York, NY)
- The Stanton Social (New York, NY)
- Toku Modern Asian (Manhasset, NY)
- Triniti (Houston, TX)
- Trio Restaurant (Palm Springs, CA)
- Twist (Atlanta, GA)
- TWO Urban Licks (Atlanta, GA)
- Uchi (Houston, TX)
- Uchiko (Austin, TX)
- Virago (Nashville, TN)
- Wang's in the Desert (Palm Springs, CA)
- Yardbird Southern Table & Bar (Miami Beach, FL)
- YOLO (Ft. Lauderdale, FL)
- Zuma Japanese Restaurant (Miami, FL)

94.7 Kid-Friendly Restaurants

The following are the winners of the 2012 Diners' Choice Award for most Kid-Friendly Restaurant:

- Aquarium Restaurant (Denver, CO)
- Benihana (Encino, CA)
- Buca di Beppo (25 locations nationwide)
- Burger Joes - Burnesville (Burnsville, MN)
- Burger Joes - Calhoun (Minneapolis, MN)
- Cafe Pesto - Kawaihae Harbor (Kawaihae, HI)
- Carmine's - 91st Street (New York, NY)
- Crown & Crumpet (San Francisco, CA)
- Deerfield (Newark, NJ)
- F. McLintocks Saloon & Dining House (Pismo Beach, CA)
- Genji Japanese Steakhouse (Dublin, OH)
- Graziano's - Chicago (Chicago, IL)
- House of Japan - Dublin (Dublin, OH)
- House of Japan - Polaris (Polaris, OH)
- Kyoto Palace Restaurant (Campbell, CA)
- Landmarc at the Time Warner Center (New York, NY)
- Margaritaville at Universal Orlando Citywalk (Orlando, FL)
- Marleys Island Grille (Hilton Head Island, SC)
- Max Brenner - Philadelphia (Philadelphia, PA)
- Max Brenner - Union Square (New York, NY)

- Mikado at Desert Springs JW Marriott (Palm Desert, CA)
- Miyama Japanese Steak House and Sushi Bar (Denver, CO)
- Mythos at Universal's Island of Adventure (Orlando, FL)
- NINJA NEW YORK (New York, NY)
- Not Your Average Joe's Acton (Acton, MA)
- Not Your Average Joe's Beverly (Beverly, MA)
- Not Your Average Joe's Landsdowne (Leesburg, VA)
- Not Your Average Joe's Needham (Needham, MA)
- Not Your Average Joe's Norwell (Norwell, MA)
- Oceanarium Restaurant (Honolulu, HI)
- Pagoda Floating Restaurant (Honolulu, HI)
- Paradise Cove Beach Cafe (Malibu, CA)
- R J Grunt's (Chicago, IL)
- Rawhide Steakhouse at Wild Horse Pass (Chandler, AZ)
- Rizzuto's Wood-Fired Kitchen & Bar - Westport (Westport, CT)
- Rosebud Italian Country House and Pizzeria (Deerfield, IL)
- Rye Grill and Bar (Rye, NY)
- Sarabeth's TriBeCa (New York, NY)
- Snow City Cafe (Anchorage, AK)
- Summer Shack (Boston, MA)
- Summer Shack Cambridge (Cambridge, MA)
- Summer Shack Dedham (Dedham, MA)
- Table 24 (Orinda, CA)
- The Brooklyn Diner Times Square (New York, NY)
- The Kitchen at Hard Rock Hotel (Orlando, FL)
- The Pirate's House (Savannah, GA)
- The Prickly Pear Cantina (Danville, CA)
- Virgil's (New York, NY)
- Yankee Pier - Larkspur (Larkspur, CA)

94.8 Late-Night Dining

The following are the 2012 Late-Night Dining Diners' Choice Award Winners:

- 28 Degrees (Boston, MA)
- 77 South (Leanwood, KS)
- Adelphia (Deptford, NJ)
- Ajna Bar (New York, NY)
- Azucar Cuban Cuisine & Cigars (Jersey City, NJ)
- B.B. King's Blues Club (Nashville, TN)
- B.B. King's Blues Club - Las Vegas (Las Vegas, NV)
- B.B. King's Blues Club - Memphis (Memphis, TN)
- B.B. King's Blues Club - Orlando (Orlando, FL)
- B.B. King's Blues Club - West Palm Beach (West Palm Beach, FL)
- Bambino Bar & Kitchen (Buffalo, NY)

- Bananas Modern American Diner (Orlando, FL)
- Bar Cento (Cleveland, OH)
- Beauty and Essex (New York, NY)
- Birrraporetti’s (Houston, TX)
- Biscuits & Blues (San Francisco, CA)
- Bistro Francais (Washington, DC)
- Bradstreet Craftshouse Restaurant (Minneapolis, MN)
- Buttons Food and Music - Addison (Addison, TX)
- Buttons Food and Music - Fort Worth (Forth Worth, TX)
- Cafe Circa (Atlanta, GA)
- Casa di Amore (Las Vegas, NV)
- Cavo (Astoria, NY)
- Chambers Eat + Drink (San Francisco, CA)
- Chapter One: the modern local (Santa Ana, CA)
- Chino Latino (Minneapolis, MN)
- Copeland’s Cheesecake Bistro (Atlanta, GA)
- Crossroads at House of Blues (Houston, TX)
- Darryl’s Corner Bar and Kitchen (Boston, MA)
- Departure Restaurant and Lounge (Portland, OR)
- Dick’s Last Resort (Chicago, IL)
- do Restaurant at the View (Atlanta, GA)
- Draft (Raleigh, NC)
- Eclipse di Luna (Atlanta, GA)
- Eclipse di Luna - Park Place (Atlanta, GA)
- Eulogy Belgian Tavern (Philadelphia, PA)
- Fly Bar & Restaurant (Tampa, FL)
- Frank Ski’s Restaurant & Lounge (Atlanta, GA)
- Fujimar (Washington, DC)
- Gilt Club (Portland, OR)
- Globe (San Francisco, CA)
- Green Russell (Denver, CO)
- Guantanamera (New York, NY)
- Gyu-Kaku - Kapiolani (Honolulu, HI)
- Gyu-Kaku - Pasadena (Pasadena, CA)
- Gyu-Kaku - Torrance (Torrance, CA)
- H Street Country Club (Washington, DC)
- Hip Kitty Jazz & Fondue (Claremont, CA)
- Holstein’s - The Cosmopolitan of Las Vegas (Las Vegas, NV)
- Latin Quarter at Universal CityWalk (Orlando, FL)
- Loca Luna (Atlanta, GA)
- Lola (St. Louis, MO)
- Lucky’s Lounge (Boston, MA)
- MeZz (Charlotte, NC)
- MPD Restaurant (New York, NY)

- MUA (Oakland, CA)
- Mulberry Project (New York, NY)
- Nacional 27 (Chicago, IL)
- Negril Village (New York, NY)
- Nine Fine Irishmen - New York New York (Las Vegas, NV)
- nopa (San Francisco, CA)
- Oola (San Francisco, CA)
- Patria Restaurant and Mixology Lounge (Rahway, NJ)
- Perch LA (Los Angeles, CA)
- POP Champagne & Dessert Bar (Pasadena, CA)
- Restaurant Aura (Minneapolis, MN)
- Rooftop 120 (Glastonbury, CT)
- Rum Bar (Philadelphia, PA)
- Sanctuaria (St. Louis, MO)
- SAX restaurant & lounge (Washington, DC)
- Scene Restaurant & Lounge (Huntsville, AL)
- Shokudo (Honolulu, HI)
- Shout (Atlanta, GA)
- Smoke Jazz and Supper Club (New York, NY)
- SOB’s - Sounds of Brazil (New York, NY)
- Soco (Brooklyn, NY)
- Solas (Raleigh, NC)
- Starlite (San Diego, CA)
- Storm Rhum Bar and Bistro (Asheville, NC)
- Strip (Atlanta, GA)
- Sub Zero Vodka Bar (St. Louis, MO)
- Sugar Factory (Las Vegas, NV)
- Suzy Wong’s House of Yum (Nashville, TN)
- Taverna Opa - Orlando (Orlando, FL)
- The Brown Street Club (Greenville, SC)
- The Darby (New York, NY)
- The Drawing Room (Chicago, IL)
- The Gorbals (Los Angeles, CA)
- The Hamilton (Washington, DC)
- The Jazz Kitchen (Indianapolis, IN)
- The Nest (Indian Wells, CA)
- Three Aces (Chicago, IL)
- Todd English P.U.B. (Las Vegas, NV)
- Tsunami - Panhandle (San Francisco, CA)
- Twist (Atlanta, GA)
- World Cafe Live at the Queen (Wilmington, DE)

94.9 Most Notable Wine Lists

The following are the winners of the 2012 Most Notable Wine List Diners' Choice Award:

- 20 Brix (Milford, OH)
- 360 Bistro (Nashville, TN)
- 4 Olives Restaurant (Manhattan, KS)
- Acquerello (San Francisco, CA)
- Addison at The Grand Del Mar (San Diego, CA)
- Aida Bistro & Wine Bar (Columbia, MD)
- Andre's Bouchée Bistro and Wine Bar (Carmel, CA)
- Angelina's Ristorante (Bonita Springs, FL)
- Artisanal Restaurant (Banner Elk, NC)
- Aureole - Las Vegas (Las Vegas, NV)
- Barolo Grill (Denver, CO)
- Bin 36 (Chicago, IL)
- Bin 38 (San Francisco, CA)
- Bistro Blanc (Glenelg, MD)
- Block 7 (Houston, TX)
- Bonterra (Charlotte, NC)
- Bouchon (Santa Barbara, CA)
- Buckheads (Richmond, VA)
- Canlis (Seattle, CA)
- Carpe Vino (Auburn, CA)
- Casa D'Angelo (Fort Lauderdale, FL)
- 'Cesca Charleston (Charleston, SC)
- Chez Francois (Vermillion, IL)
- Cinghiale - Enoteca Wine Bar (Baltimore, MD)
- Copia Restaurant and Wine Garden (St. Louis, MO)
- Cork Restaurant (Chandler, AZ)
- daryl Restaurant (New Brunswick, NJ)
- DOC Wine Bar (Lombard, IL)
- Domaine Hudson (Wilmington, DE)
- Eno Vino Wine Bar and Bistro (Madison, WI)
- Enotria (Sacramento, CA)
- Fleming's Prime Steakhouse & Wine Bar (West Hartford, CT)
- Flyte World Dining & Wine (Nashville, TN)
- Frasca Food and Wine (Boulder, CO)
- Grand Cru Wine Bar & Bistro (Arlington, VA)
- Grapeseed (Bethesda, MD)
- Graziano's Coral Gable (Coral Gables, FL)
- Hampton Street Vineyard (Columbia, SC)
- Indulge Bistro & Wine Bar (Highlands Ranch, CO)
- Iron Bridge Wine Company - Columbia (Columbia, MD)
- Iron Bridge Wine Company - Warrenton (Warrenton, VA)

- La Famiglia Ristorante (Philadelphia, PA)
- La Sirena (West Palm Beach, FL)
- Los Olivos Wine Merchant & Cafe (Los Olivos, CA)
- Marche Bacchus (Las Vegas, NV)
- Max’s Wine Die (Austin, TX)
- Mercy Wine Bar (Dallas, TX)
- Metrovino (Portland, OR)
- Morrell Wine Bar & Cafe (New York, NY)
- Napa & Company (Stamford, CT)
- Novita Wine Bar Trattoria (Garden City, NY)
- On The Square (Tarboro, NC)
- Pairings Bistro (Bel Air, MD)
- Porter’s Steakhouse (Collinsville, IL)
- Press (Saint Helena, CA)
- Proof Restaurant (Washington, DC)
- Purple Cafe and Wine Bar (Bellevue, WA)
- Purple Cafe and Wine Bar (Kirkland, WA)
- Purple Cafe and Wine Bar (Seattle, WA)
- Purple Cafe and Wine Bar (Woodinville, WA)
- Red Fish Restaurant (Hilton Head Island, SC)
- Red Newt Bistro (Hector, NY)
- Reserve Grand Rapids (Grand Rapids, MI)
- Ristorante Panorama (Philadelphia, PA)
- RN74 - Seattle (Seattle, WA)
- Robust (Webster Groves, MO)
- SeaBlue Restaurant & Wine Bar (North Myrtle Beach, SC)
- Sip Restaurant (Issaquah, WA)
- Soif Wine Bar Restaurant (Santa Cruz, CA)
- Sonoma Grille Pittsburgh (Pittsburgh, PA)
- Sonoma Wine Bar & Bistro (Virginia Beach, VA)
- Stone Balloon Winehouse (Newark, DE)
- Stonehome Wine Bar & Restaurant (Brooklyn, NY)
- Tannin Wine Bar and Kitchen (Kansas City, MO)
- Tastings Wine Bar and Bistro (Foxboro, MA)
- Troquet (Boston, MA)
- The 3rd Corner Wine Shop & Bistro (Palm Desert, CA)
- The Curious Grape (Arlington, VA)
- The Hobbit (Orange, CA)
- The Joel Palmer house (Dayton, OR)
- The Pluckemin Inn (Bedminster, NJ)
- The Refectory Restaurant & Bistro (Columbus, OH)
- The Royce at the Langham (Pasadena, CA)
- The Tasting Room @ City Centre (Houston, TX)
- The Tasting Room Wine & Tapas (St. Augustine, FL)

- The Wine Kitchen on the Creek (Frederick, MD)
- The Winery Restaurant & Wine Bar (Tustin, CA)
- Two 40 South Restauran & Wine Bar (Brea, CA)
- Undici (Rumson, NJ)
- Upstairs 2 (Los Angeles, CA)
- Venice Ristorante & Wine Bar (Denver, CO)
- Veritas (New York, NY)
- Vertical Wine Bistro (Pasadena, CA)
- Vines Grille and Wine bar (Orlando, FL)
- Vino Rosina (Baltimore, MD)
- Vinology (Ann Arbor, MI)
- Whitehouse-Crawford (Walla Walla, WA)
- Wine 30 (New York, NY)
- Wine Market Bistro (Baltimore, MD)

94.10 Most Romantic Restaurants

The following are the winners of the 2012 Diners' Choice Award for Most Romantic Restaurant:

- A Caprice (Tiburon, CA)
- Acquerello (San Francisco, CA)
- Addison at The Grand Del Mar (San Diego, CA)
- Alize at the Top of the Palms Casino Resort (Las Vegas, NV)
- Andre's at the Monte Carlo Resort & Casino (Las Vegas, NV)
- Bacaro (New York, NY)
- Bertrand at Mister A's (San Diego, CA)
- Bouchard Restaurant and Inn (Newport, RI)
- Boulevard Steakhouse (Edmond, OK)
- Briarhurst Manor (Manitou Springs, CO)
- Brown's Beach House (Kohala Coast, HI)
- Cacharel Restaurant (Arlington, TX)
- Cafe Central (El Paso, TX)
- Cafe Renaissance (Vienna, VA)
- Canlis (Seattle, WA)
- Capische (Wailea, HI)
- Castle Falls (Oklahoma City, OK)
- Chez Francois (Vermillion, OH)
- Chez Nous French Restaurant (Humble, TX)
- Chez Shea (Seattle, WA)
- Club A Steakhouse (New York, NY)
- Coach House (Oklahoma City, OK)
- Coach Insignia (Detroit, MI)
- Craftwood Inn (Manitou Springs, CO)
- Different Pointe of View (Phoenix, AZ)

- Eagle’s Nest - Hyatt Regency Indianapolis (Indianapolis, IN)
- Eiffel Tower (Las Vegas, NV)
- Erminia Ristorante (New York, NY)
- Fearrington House Restaurant (Pittsboro, NC)
- Fleur de Lys (San Francisco, CA)
- French 75 Bistro (Laguna Beach, CA)
- French Cafe (Omaha, NE)
- Geja’s Café (Chicago, IL)
- Genoa Restaurant (Portland, OR)
- Gibraltar (Miami, FL)
- Glasbern Country Inn (Fogelsville, PA)
- Il Bistro (Seattle, WA)
- Il Cielo Gardens Restaurant & Bar (Beverly Hills, CA)
- Il Mulino (Chicago, IL)
- La Caille Restaurant (Sandy, UT)
- La Cremaillere (Bedford, NY)
- La Mer at Halekulani (Honolulu, HI)
- Latitudes (Key West, FL)
- L’Auberge Restaurant on Oak Creek (Sedona, AZ)
- Log Haven (Salt Lake City, UT)
- Madrona Manor (Healdsburg, CA)
- Michael’s-South Point Casino (Las Vegas, NV)
- Michel’s at the Colony Surf (Honolulu, HI)
- Mona Lisa Fondue Restaurant (Manitou Springs, CO)
- Nana (Dallas, TX)
- Nikolai’s Roof (Atlanta, GA)
- One if by Land, Two if by Sea (New York, NY)
- Pamplemousse Le Restaurant (Las Vegas, NV)
- Pepper Tree Restaurant (Colorado Springs, CO)
- Plume at the Jefferson Hotel (Washington, DC)
- Quiessence Restaurant & Wine Bar (Phoenix, AZ)
- Red Fish Grill (Miami, FL)
- Restaurant Iris (Memphis, TN)
- Ristorante Massimo (Portsmouth, NH)
- Riverview Restaurant (Troutdale, OR)
- Roof Restaurant (Salt Lake City, UT)
- Sarento’s Top of the ‘I’ (Honolulu, HI)
- SASSI (Scottsdale, AZ)
- Seagar’s Restaurant (Destin, FL)
- Second Empire Restaurant and Tavern (Raleigh, NC)
- Shadowbrook Restaurant Capitola (Capitola, CA)
- Sir Winston’s Aboard The Queen Mary (Long Beach, CA)
- Spindletop (Houston, TX)
- Stonehouse at San Ysidro Ranch (Santa Barbara, CA)

- The Cellar (Fullerton, CA)
- The Dining Room - Biltmore Estates (Asheville, NC)
- The Elkridge Furnace Inn (Elkridge, MD)
- The French Room (Dallas, TX)
- The Hungry I (Boston, MA)
- The Library Restaurant (Charleston, SC)
- The Little Door (Los Angeles, CA)
- The Melting Pot (Arlington, TX)
- The Melting Pot (Atlanta, GA)
- The Melting Pot (Columbus, OH)
- The Melting Pot (Dayton, OH)
- The Melting Pot (Fairview Park, OH)
- The Melting Pot (Greenwood, IN)
- The Melting Pot (Indianapolis, IN)
- The Melting Pot (Knoxville, TN)
- The Melting Pot (Larkspur, CA)
- The Melting Pot (Memphis, TN)
- The Melting Pot (Myrtle Beach, SC)
- The Melting Pot (Richmond, VA)
- The Melting Pot (Virginia Beach, VA)
- The Melting Pot (University City, MO)
- The Old Warsaw (Dallas, TX)
- The Refectory Restaurant & Bistro (Columbus, OH)
- The Sky Room (Long Beach, CA)
- Tidepools (Poipu, HI)
- Vernon’s Hidden Valley Steakhouse (Los Ranchos De Albuquerque, NM)
- White Barn Inn (Kennebunk Beach, ME)
- Yamashiro (Hollywood, CA)
- Zenkichi (Brooklyn, NY)

94.11 Most Scenic Views

The following are the winners of the 2012 Diners’ Choice Award for restaurant with the Most Scenic Views:

- 42 (White Plains, NY)
- A Caprice (Tiburon, CA)
- Alchemy Restaurant at Copperwyn Resort (Fountain Hills, AZ)
- Alizé at the Top of the Palms Casino Resort (Las Vegas, NV)
- Aquarius - Dream Inn (Santa Cruz, CA)
- Bali Hai Restaurant (San Diego, CA)
- Baxter’s Lakeside Grille (Lake Ozark, MO)
- Beach Chalet Brewery & Restaurant (San Francisco, CA)
- BeachHouse bar + grill (Kirkland, WA)
- Bertrand at Mister A’s (San Diego, CA)

- Boat House Waterfront Dining (Tiverton, RI)
- Canlis (Seattle, WA)
- Cannons Seafood Grill (Dana Point, CA)
- Chart House Restaurant - Atlantic City (Atlantic City, NJ)
- Chart House Restaurant - Cardiff (Cardiff, CA)
- Chart House Restaurant - Dana Point (Dana Point, CA)
- Chart House Restaurant - Longboat Key (Longboat Key, FL)
- Chart House Restaurant - Malibu (Malibu, CA)
- Chart House Restaurant - Portland (Portland, TX)
- Chart House Restaurant - Redondo Beach (Redondo Beach, CA)
- Chart House Restaurant - Towers of the Americas (San Antonio, TX)
- Chart House Restaurant - Weehawken (Weehawken, NJ)
- Chelsea’s Chowder House (Long Beach, CA)
- Cite (Chicago, IL)
- Coach Insignia (Detroit, MI)
- Columbia Restaurant (St. Petersburg, FL)
- Compass Restaurant - Hyatt Regency Phoenix (Phoenix, AZ)
- Crow’s Nest - Hotel Captain Cook (Anchorage, AZ)
- Cutters Crabhouse (Seattle, WA)
- Different Pointe of View (Phoenix, AZ)
- Duke’s Malibu (Malibu, CA)
- Eagle’s Nest - Hyatt Regency Indianapolis (Indianapolis, IN)
- Edgewood Restaurant (Lake Tahoe, NV)
- Fish Hopper (Monterey, CA)
- Five Sixty by Wolfgang Puck (Dallas, TX)
- Flagstaff House (Boulder, CO)
- Fog Harbor Fish House (San Francisco, CA)
- Franciscan Crab Restaurant (San Francisco, CA)
- Georgetowne Inn (Pittsburg, PA)
- Grandviews at the Grand Hyatt San Francisco (San Francisco, CA)
- Harbor House (Milwaukee, WI)
- High Finance Restaurant - At the top of the Tram (Albuquerque, NM)
- Highlawn Pavilion (West Orange, NJ)
- Il Fornaio - Coronado (Coronado, CA)
- Island Prime (San Diego, CA)
- JJ Astor (Duluth, MN)
- La Costanera (Montara, CA)
- Lynnhaven Fish House (Virginia Beach, VA)
- Marina Cafe (Destin, FL)
- McCormick & Kuleto’s Seafood Restaurant (San Francisco, CA)
- Metropolitan Club (Chicago, IL)
- Miramar Beach Restaurant (Half Moon Bay, CA)
- Monterey Bay Fish Grotto (Mt. Washington, PA)
- Moss Beach Distillery (Half Moon Bay, CA)

- Nick and Nino's Penthouse Steakhouse-Hilton Springfield (Springfield, IL)
- Old Oyster Factory (Hilton Head, SC)
- Pacific's Edge Restaurant (Carmel, CA)
- Palisade (Seattle, WA)
- Peaks Restaurant (Palm Springs, CA)
- Portland City Grill (Portland, OR)
- Primavista (Cincinnati, OH)
- R Lounge at Two Times Square (Manhattan, NY)
- Riva's Crabhouse on Navy Pier (Chicago, IL)
- River's End (Jenner, CA)
- Robert (Manhattan, NY)
- Rocky Point Restauran (Carmel, CA)
- Sandiago's Mexican Grill (Albuquerque, MN)
- Sarento's Top of the "I" (Honolulu, HI)
- Seaglass Restaurant and Lounge (Salisbury, MA)
- Seven Glaciers (Anchorage, AK)
- Severn Inn (Annapolis, MD)
- Signature Room at the 95th (Chicago, IL)
- Six Seven Restaurant & Lounge (Seattle, WA)
- Skates on the Bay (Berkeley, CA)
- SkyCity Restaurant at the Space Needle (Seattle, WA)
- Steamers of Pismo (Pismo Beach, CA)
- Steiner Ranch Steakhouse (Austin, TX)
- Sundial Restaurant at the Westin Peachtree (Atlanta, GA)
- Sunnyside (Tahoe City, CA)
- Sutro's at the Cliff House (San Francisco, CA)
- The Celestial Steakhouse (Cincinnati, OH)
- The Grandview Restaurant and Lounge at The Geneva Inn (Lake Geneva, WI)
- The Marine Room (La Jolla, CA)
- The Penthouse Restaurant (Santa Monica, CA)
- The Restaurant at Alderbrook (Union, WA)
- The Restaurant at Patowmack Farm (Lovettsville, VA)
- The Spinnaker(Sausalito, CA)
- The Sunset (Malibu, CA)
- The View Restaurant (New York, NY)
- Top of the Hub (Boston, MA)
- Top of the Riverfront - Millennium Hotel (St. Louis, MO)
- Top of the Tower (New York, NY)
- View (Oakdale, NY)
- West Restaurant and Lounge (Los Angeles, CA)
- WP24 by Wolfgang Puck (Los Angeles, CA)
- Yamashiro (Hollywood, CA)

94.12 Outdoor Dining

The following are the winners of the 2012 Diners' Choice Award for Best Outdoor Dining:

- A Fish Called Avalon (Miami Beach, FL)
- Adobe Grill @ La Quinta Resort (La Quinta, CA)
- Alexander's (Naples, FL)
- BALEENnaples (Naples, FL)
- Beachcomber Cafe - Crystal Cove (Newport Coast, CA)
- Bimini Boatyard (Fort Lauderdale, FL)
- Blue Agave Club (Pleasanton, CA)
- Blue Coyote Bar & Grill (Palm Springs, CA)
- Blue Dragon Restaurant (Kamuela, HI)
- Blue Moon Fish Co. (Fort Lauderdale, FL)
- Bridge House Tavern (Chicago, IL)
- Brockton Villa (La Jolla, CA)
- Brown's Beach House - The Fairmont Orchid (Kohala Coast, HI)
- Cafe Amelie (New Orleans, LA)
- Cafe Luna (Naples, FL)
- Cafe Malaga (McKinney, TX)
- Cafe Pinot (Los Angeles, CA)
- Cafe Sambal - Mandarin Oriental Miami (Miami, FL)
- Cafe Santorini (Pasadena, CA)
- Caffe Riace (Palo Alto, CA)
- Campiello (Naples, FL)
- Capische (Wailea, HI)
- Chart House Restaurant (Ft. Lauderdale, FL)
- Chautauqua Dining Hall (Boulder, CO)
- Dada (Delray Beach, FL)
- Deck 84 (Delray Beach, FL)
- Duke's Beach House Maui (Lahaina, HI)
- Edendale (Los Angeles, CA)
- El Chorro Lodge (Paradise Alley, AZ)
- Ferraro's Bar e Ristorante Maui (Wallea, HI)
- Five Palms Beach Grill (Kihei, HI)
- Gannon's (Wailea, HI)
- Gaylord's at Kilohana (Lihue, HI)
- George's Ocean Terrace (La Jolla, CA)
- GG's Waterfront Bar & Grill (Hollywood, FL)
- Gigino at Wagner Park (New York, NY)
- Handsome Harry's Third Street Bistro (Naples, FL)
- Hau Tree Lanai (Honolulu, HI)
- House of Tricks (Tempe, AZ)
- Hula Grill - Kaanapali (Lahaina, HI)
- Jackalope Ranch (Indio, CA)

- Jake's (Palm Springs, CA)
- Japengo - Maui (Lahina, HI)
- JB's On The Beach (Deerfield Beach, FL)
- JRDN Restaurant (San Diego, CA)
- Katsuya - Glendale - SBE (Glendale, CA)
- La Bottega (New York, NY)
- Latitudes (Key West, FL)
- Lavender Bistro (La Quinta, CA)
- Lon's at The Hermosa (Paradise Valley, AZ)
- Marche Bacchus (Las Vegas, NV)
- Martinique Bistro (New Orleans, LA)
- Max's Grille (Boca Raton, FL)
- Metro Lafayette (Lafayette, CA)
- Milagros (Redwood City, CA)
- MiraMare (Naples, FL)
- Nick's Fishmarket Maui (Wailea, HI)
- Nine One Five (Key West, FL)
- Novo Restaurant (San Luis Obispo, CA)
- Oceans 234 (Deerfield Beach, FL)
- Olive and June (Austin, TX)
- Ophelia's on the bay (Sarasota, FL)
- Ovations at Wolf Trap (Vienna, VA)
- Paradise Cove Beach Cafe (Malibu, CA)
- Perch LA (Los Angeles, CA)
- Pier 23 Cafe (San Francisco, CA)
- Pier 45 (Rochester, NY)
- Plantation Gardens (Koloa, HI)
- Plumeria Beach House (Kahala, HI)
- Portico Restaurant(Richmond, VA)
- Poseidon (Del Mar, CA)
- Purple Palm Restaurant (Palm Springs, CA)
- Red Fish Grill (Miami, FL)
- Renato's (Palm Beach, FL)
- Restaurant at Sunset Marquis (West Hollywood, CA)
- Rocco's Tacos & Tequila Bar (Boca Raton, FL)
- Sam Choy's Kai Lanai (Kailua-Kona, HI)
- Sapphire Laguna (Laguna Beach, CA)
- Sheerwater Restaurant at the Hotel Del Coronado (Coronado, CA)
- Sonoma Wine Garden (Santa Monica, CA)
- Spencer's Restaurant (Palm Springs, CA)
- Splashes at Surf & Sand Resort (Laguna Beach, CA)
- Stone Brewing World Bistro & Garden (Escondido, CA)
- Sundowners on The Bay (Key Largo, FL)
- Sundy House (Delray Beach, FL)

- TART Restaurant @ Farmer's Daughter Hotel (Los Angeles, CA)
- The House at Secret Garden (Phoenix, AZ)
- The Restaurant at Ponte (Temecula, CA)
- The Turtle Club (Naples, FL)
- Tommy Bahama's Restaurant & Bar - Naples (Naples, FL)
- Tommy Bahama's Restaurant & Bar - Palm Desert (Palm Desert, CA)
- Tommy Bahama's Restaurant & Bar - Wailea, Maui (Kihei, HI)
- Trio on the Bay (North Bay Village, FL)
- Veranda Fireside Lounge & Restaurant (San Diego, CA)
- Vic and Angelo's (Palm Beach Gardens, FL)
- Villa Sorriso (Pasadena, CA)
- Wilshire (Santa Monica, CA)
- Woodshed Smokehouse (Fort Worth, TX)

94.13 Top American Cuisine

The following are the winners of the 2012 Diners' Choice Award for restaurants in the United States that specialize in American Cuisine:

- 1789 Restaurant (Washington, DC)
- A Toute Heure (Cranford, NJ)
- Abacus (Dallas, TX)
- Annie Gunn's (Chesterfield, MO)
- Annisa (New York, NY)
- Aria (Atlanta, GA)
- Ashley's Restaurant (Little Rock, AR)
- Bartlett Pear Inn (Easton, MD)
- Blue Hill (New York, NY)
- Blue Hill at Stone Barns (Pocantico Hills, NY)
- Bluestem (Kansas City, MO)
- Boulevard (San Francisco, CA)
- Bouquet Restaurant and Wine Bar (Covington, KY)
- Cabernet Grill Texas Wine Country Restaurant (Fredricksburg, TX)
- Canoe (Atlanta, GA)
- Carpe Diem Restaurant (Charlotte, NC)
- Castagna (Portland, OR)
- Charleston (Baltimore, MD)
- Charleston Grill (Charleston, SC)
- Cheever's Cafe (Oklahoma City, OK)
- Chef's Table at the Edgewater (Winter Garden, FL)
- Coldwater Cafe & Catering (Tipp City, OH)
- Communal (Provo, UT)
- Corbett's Fine Dining (Louisville, KY)
- Corduroy (Washington, DC)
- Craft (New York, NY)

- Dal Rae (Pico Rivera, CA)
- Dante (Tremont, OH)
- Devereaux’s (Greenville, SC)
- Eleven Madison Park (New York, NY)
- Ellerbe Fine Foods (Fort Worth, TX)
- Fearing’s (Dallas, TX)
- FIG (Charleston, SC)
- Flagstaff House (Boulder, CO)
- Gramercy Tavern (New York, NY)
- Grove (Grand Rapids, MI)
- Hamptons (Sumter, SC)
- Harry’s Restaurant (Manhattan, KS)
- Herons (Cary, NC)
- joan’s in the Park (Saint Paul, MN)
- John Bentley’s (Redwood City, CA)
- K restaurant (Orlando, FL)
- Lahaina Grill (Lahaina, HI)
- Lilly’s Bistro (Louisville, KY)
- LJ’s & The Kat Lounge (Hagerstown, MD)
- Lola - A Michael Symon Restaurant (Cleveland, OH)
- Manhattan Beach Post (Manhattan Beach, CA)
- McEwen’s on Monroe (Memphis, TN)
- Mica (Chestnut Hill, PA)
- Millwright’s (Simsbury, CT)
- Milton’s Cuisine and Cocktails (Milton, GA)
- Mokomandy (Sterling, VA)
- Mulvaney’s B&L (Sacramento, CA)
- Murray’s Restaurant & Cocktail Lounge (Minneapolis, MN)
- Nana’s Restaurant (Durham, NC)
- Niche (St. Louis, MO)
- Orchids at Palm Court (Cincinnati, OH)
- Paseo Grill (Oklahoma City, OK)
- Patti’s 1880's Settlemen (Grand Rivers, KY)
- Peli Peli (Houston, TX)
- Peninsula Grill (Charleston, SC)
- Per Se (New York, NY)
- Restaurant Tallent (Bloomington, IN)
- Root Down (Denver, CO)
- Saddle Peak Lodge (Calabasas, CA)
- Seasons 52 (Phoenix, AZ)
- Shoemaker’s Grille (Lynchburg, VA)
- Silo Elevated Cuisine 1604 (San Antonio, TX)
- Silo Elevated Cuisine - Alamo Heights (San Antonio, TX)
- Splendido (Beaver Creek, CO)

- St. John’s Meeting Place (Chattanooga, TN)
- St. John’s Restaurant (Chattanooga, TN)
- Story (Prairie Village, KS)
- Sweet Basil (Vail, CO)
- Talula’s Garden (Philadelphia, PA)
- The American Restaurant (Kansas City, MO)
- The Blue Ox (Lynn, MA)
- The Cafe at Brookwood (Brookshire, TX)
- The Classic Table (Roanoake, TX)
- The Dock (Newport Beach, CA)
- The Macintosh (Charleston, SC)
- The Mill at 2T (Tariffville, CT)
- The Orchard Restaurant in Kennett Square (Kennett Square, PA)
- The Parson’s Table (Little River, SC)
- The Prime Rib (Baltimore, MD)
- The Pullman (Glenwood Springs, CO)
- The Ranch Restaurant (Anaheim, CA)
- The Root Restaurant & Bar (White Lake, MI)
- The Schoolhouse at Cannondale (Wilton, CT)
- The Tree Room @ Sundance (Sundance, UT)
- Tilth (Seattle, WA)
- Vernick Food & Drink (Philadelphia, PA)
- Vie (Western Springs, IL)
- Vintage Tavern (Suffolk, VA)
- VOLT (Frederick, MD)
- Washington Inn (Cape May, NJ)
- White Barn Inn (Kennebunk, ME)
- Woodberry Kitchen (Baltimore, MD)

95

DISTINGUISHED RESTAURANTS

95.1 Overview

Distinguished Restaurants of North America (www.dirona.com), a non-profit organization, seeks to promote fine dining by recognizing and promoting excellence in dining.

95.2 List Of Distinguished Restaurants 2013

Alabama
- Highlands Bar & Grill (Birmingham)

Alaska
- The Crow's Nest at Hotel Captain Cook (Anchorage)
- The Pump House Restaurant (Fairbanks)

Arizona
- Anthony's in the Catalinas (Tucson)
- Cartwright's Sonoran Ranch House (Cave Creek)
- Different Point of View (Phoenix)
- L'Auberge de Sedona (Sedona)
- Tonto Bar and Grill (Cave Creek)
- Uncle Sal's Italian Restaurant (Scottsdale)
- Wright's at the Biltmore Resort (Phoenix)

Arkansas
- Ashley's at the Capital (Little Rock)

California
- Acqua (San Diego)
- Acquerello (San Francisco)
- Alexander's Steakhouse (Cupertino)
- Anaheim White House Restaurant (Anaheim)
- Auberge du Soleil (Rutherford)
- Biba (Sacramento)
- Bistango (Irvine)

- C2 Steak & Seafood (Brooks)
- Domaine Chandon (Yountville)
- Donovan's Steak & Chop House (La Jolla)
- Duane's Prime Steaks & Seafood (Riverside)
- El Bizcocho Winery (San Diego)
- Fandango (Pacific Grove)
- Farallon (San Francisco)
- Fior d'Italia (San Francisco)
- First Cabin (Newport Beach)
- Five Crowns Restaurant (Corona del Mar)
- French Laundry (Yountville)
- Gennaro's Ristorante (Glendale)
- George's at the Cove (La Jolla)
- Grant Grill (San Diego)
- Harris' Restaurant (San Francisco)
- 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)
- L'Olivier (San Francisco)
- 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)
- Pacifica Seafood Restaurant (Palm Desert)
- Pacific's Edge (Carmel)
- Paolo's Restaurant (San Jose)
- Park Avenue Steaks & Chops (Stanton)
- Patina (Los Angeles)
- Postrio (San Francisco)
- The Cellar (Fullerton)
- The French Laundry (Yountville)
- The Grill on Hollywood (Hollywood)
- The Grill on the Alley (Beverly Hills)

- The Hobbit Restaurant (Orange, CA)
- The Marine Room (La Jolla)
- The Plumed Horse (Saratoga)
- The Restaurant at Wente Vineyards (Livermore)
- The Sardine Factory (Monterey)
- The Sky Room (Long Beach)
- The Winery at the District (Tustin)
- Tommy Toy's Cuisine Chinoise (San Francisco)
- Trader Vic's (Emeryville)
- Valentine Restaurant (Santa Monica)
- Wally's Desert Turtle (Rancho Mirage)
- Water Grill Restaurant (Los Angeles)

Colorado
- Beano's Cabin (Avon)
- Broker Restaurant (Denver)
- Brook's Steakhouse (Greenwood Village)
- Charles Court (Colorado Springs)
- Flagstaff House (Boulder)
- Larkspur Restaurant (Vail)
- Left Bank Restaurant (Vail)
- Ludwig's (Vail)
- Mirabelle Restaurant at Beaver Creek (Avon)
- Palace Arms at The Brown Palace Hotel (Denver)
- Restaurant Kevin Taylor (Denver)
- Strings (Denver)
- Syzygy (Aspen)
- Terra Bistro (Denver)
- The Cliff House Dining Room (Manitou Springs)
- The Penrose Room (Colorado Springs)
- The Tuscany (Denver)

Connecticut
- Bernard's (Ridgefield)
- Cavey's Restaurant (Manchester)
- Rebeccas (Greenwich)
- Restaurant Jean-Louis (Greenwich)

Delaware
- Columbus Inn (Wilmington)
- The Green Room (Wilmington)

District of Columbia

- 1789 Restaurant (Washington)
- 701 Restaurant (Washington)
- Bombay Club (Washington)
- Equinox Restaurant (Washington)
- i Ricchi (Washington)
- Kinkead's An American Brasserie (Washington)
- Marcel's (Washington)
- Michel Richard Citronelle (Washington)
- Smith & Wollensky (Washington)
- Taberna Del Alabardero (Washington)
- Teatro Goldoni (Washington)
- The Caucus Room (Washington)
- The Oceanaire Seafood Room (Washington)
- The Oval Room (Washington)
- The Prime Rib (Washington)

Florida

- 30 Degree Blue (Panama City Beach)
- 32 East (Delray Beach)
- 95 Cordova Restaurant and Cobalt Lounge (St. Augustine)
- Armani's at the Grand Hyatt Tampa Bay (Tampa)
- Arturo's Ristorante (Boca Raton)
- Atlantic's Edge at Cheeca Lodge & Spa (Islamorada)
- Bern's Steak House (Tampa)
- Bistro AIX (Jacksonville)
- Brooks Restaurant (Deerfield Beach)
- Cafe Cellini (Palm Beach)
- Cafe' Chardonnay (Palm Beach Gardens)
- Cafe L'Europe (Palm Beach and Sarasota)
- Café Margaux (Cocoa)
- Capriccio Ristorante (Pembroke Pines)
- Chardonnay Restaurant (Naples)
- Charley's Aged Steaks & Market Fresh Fish (Tampa)
- Charley's Steak House (Orlando and Kissimmee)
- Chef Allen's (Aventura)
- Christini's Ristorante Italiano (Orlando)
- Columbia Restaurant (Tampa)
- Darrel & Oliver's Cafe' Maxx (Pompano Beach)
- Donatello (Tampa)
- Eduardo de San Angel (Ft. Lauderdale)
- Euphemia Haye (Longboat Key)
- Finz (Destin)
- FishBones (Lake Mary)

- Grill Room on Las Olas (Ft. Lauderdale)
- Johnnie's Hideaway (Orlando)
- Maison & Jardin (Altamonte Springs)
- Marina Cafe (Destin)
- Michael's on East (Sarasota)
- MoonFish (Orlando)
- Old Hickory Steakhouse (Kissimmee)
- Ristorante Paradiso (Lake Worth)
- Ruth's Chris Steak House (Orlando, North Palm Beach, and Winter Park)
- Seagar's Prime Steaks & Seafood (Destin)
- SideBerns (Tampa)
- Smith & Wollensky (Miami Beach)
- Square One Restaurant (Key West)
- Ta-boo´ Restaurant (Palm Beach)
- Tantra Restaurant and Lounge (Miami Beach)
- The Black Pearl (Dunedin)
- The Boheme (Orlando)
- The Colony Dining Room (Longboat Key)
- The Flagler Steakhouse (Palm Beach)
- The Forge (Miami Beach)
- Vito's Chop House (Orlando)

Georgia
- Aqua Blue (Norcross)
- Aria (Atlanta)
- Bone's Restaurant (Atlanta)
- Hi Life Restaurant (Norcross)
- La Grotta Ristorante Italiano (Atlanta)
- Local 11ten Food and Wine (Savannah)
- Murphy's (Atlanta)
- Nikolai's Roof at The Hilton Atlanta (Atlanta)
- Sapphire Grill (Savannah)
- South City Kitchen Midtown (Atlanta)
- The Olde Pink House Restaurant (Savannah)

Hawaii
- Alan Wong's Restaurant (Honolulu)
- Bali by the Sea (Honolulu)
- Cafe' Portofino (Lihue)
- La Mer (Honolulu)
- Pahu i'a (Kailua-Kona)

Idaho
- Beverly's (Coeur d'Alene)

Illinois
- Carlucci (Rosemont)
- Chicago Chop House (Chicago)
- Cite' Elegant Dining (Chicago)
- Coco Pazzo (Chicago)
- Gene & Georgetti (Chicago)
- Gibson's Bar & Steakhouse (Chicago)
- Joe's Seafood, Prime Steak & Stone Crab (Chicago)
- Lawry's The Prime Rib (Chicago)
- Le Titi de Paris (Arlington Heights)
- Le Vichyssois (Lakemoor)
- Nieto's (Highland Park)
- Salpicón (Chicago)
- Smith & Wollensky (Chicago)
- The Grill on the Alley (Chicago)
- Va Pensiero (Evanston)
- Vivere (Chicago)

Iowa
- 801 Chophouse (Des Moines)
- Splash Seafood Bar & Grill (Des Moines)

Kentucky
- Equus Restaurant (Louisville)
- The Oakroom at the Seelbach Hotel (Louisville)
- Vincenzo's Italian Restaurant (Louisville)
- Winston's Restaurant (Louisville)

Louisiana
- Andrea's Restaurant (Metairie)
- Arnaud's Restaurant (New Orleans)
- Bayona (New Orleans)
- Bistro at Maison de Ville (New Orleans)
- Commander's Palace (New Orleans)
- Galatoire's Restaurant (New Orleans)
- GW Fins (New Orleans)
- Lafitte's Landing (Donaldsville and Darrow)
- Le Parvenu Restaurant (Kenner)
- Mr. B's Bistro (New Orleans)
- Ruth's Chris Steak House (Metairie)
- Stella! (New Orleans)
- Superiors Steakhouse (Shreveport)
- The Grill Room at the Windsor Court Hotel (New Orleans)

Maine

- Clay Hill Farm (York)
- The White Barn Inn (Kennebunkport)

Maryland

- Antrim 1844 (Taneytown)
- Da Mimmo (Baltimore)
- Della Notte Ristorante (Baltimore)
- Restaurant 213 (Fruitland)
- The Milton Inn (Sparks)

Massachusetts

- 75 Chestnut (Boston)
- Anthony's Pier 4 (Boston)
- Bravo (Boston)
- Chillingsworth (Brewster)
- Dan'l Webster Inn (Sandwich)
- Grill 23 & Bar (Boston)
- Il Capriccio Restorante e Bar (Waltham)
- 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)
- La Spiaggia (Ship Botton)
- L'Allegria Restaurant, Inc. (Madison)
- 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)
- La Bergerie (Alexandria)
- L'Auberge Chez Francois (Great Falls)
- 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)

96

FAVORITE LIMITED-SERVICE RESTAURANTS

96.1 Overview

A series of surveys conducted in 2012 by Market Force Information (www.marketforce.com) queried consumers about their favorite restaurants. The surveys calculated favorites in six categories based on the total number of votes, then factored in the number of locations for each chain to present a more level view of the results. Rankings of the favorite chains, indexed by restaurant count, are presented in this chapter.

96.2 Top Chains By Segment

Burger Chains

1. Five Guys Burgers and Fires
2. In-N-Out Burger
3. Fuddruckers
4. A&W All-American Food
5. Smashburger
6. Culver's
7. Steak 'n Shake
8. Whataburger
9. Carl's Jr.
10. Wendy's

Chicken Chains

1. Chick-fil-A
2. Raising Cane's
3. Boston Market
4. El Pollo Loco
5. Zaxby's
6. Popeye's Louisiana Kitchen
7. KFC
8. Wingstop
9. Church's Chicken

Ice Cream Chains
1. Ben & Jerry's
2. Cold Stone Creamery
3. Culver's
4. Häagen Dazs
5. Baskins-Robbins
6. Dairy Queen
7. Carvel Ice Cream

Mexican Food Chains
1. Chipolte
2. Baja Fresh
3. Moe's Southwest Grill
4. Taco Cabana
5. Qdoba
6. El Pollo Loco
7. Taco John's
8. Taco Bell
9. Del Taco

Pizza Chains
1. CiCi's Pizza
2. Papa John's
3. Papa Murphy's
4. Sbarro
5. Pizza Hut
6. Godfather's
7. Domino's
8. Little Caesars

Sandwich Chains
1. Panera Bread
2. Jason's Deli
3. McAlister's Deli
4. Firehouse Subs
5. Quiznos
6. Jimmy John's
7. Arby's
8. Subway

96.3 Market Resources

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97

FINE-DINING HALL OF FAME

97.1 List of Inductees

Nation's Restaurant News has inducted the following restaurants into its Fine-Dining Hall of Fame (1999 - 2012):

- Abacus (Dallas, TX)
- Ahwahnee Dining Room (Yosemite National Park, CA)
- Alan Wong's (Honolulu, HI)
- Alinea (Chicago, IL)
- Americas (Houston, TX)
- Annie Gunn's (Chesterfield, MO)
- Aqua (San Francisco, CA)
- Aquavit (New York, NY)
- Aubergine (Newport Beach, CA)
- Babbo (New York, NY)
- Bacchanalia (Atlanta, GA)
- Barolo Grill (Denver, CO)
- Bayona (New Orleans, LA)
- Beverly's Restaurant (Coeur d'Alene, ID)
- Blackberry Farm (Walland, TN)
- Blackbird (Chicago, IL)
- Blue Ginger (Wellesley, MA)
- Blue Hill (New York, NY)
- Boulevard (San Francisco, CA)
- Bouley (New York, NY)
- Brasserie Le Coze (Atlanta, GA)
- Brennan's of Houston (Houston, TX)
- Brigtsen's (New Orleans, LA)
- Broussard's (New Orleans, LA)
- Cafe 36 (La Grange, IL)
- Cafe L'Euroupe (Palm Beach, FL)
- Cafe Pacific (Dallas, TX)
- Cafe Ponte (Clearwater, FL)
- Canoe (Atlanta, GA)
- Cashion's Eat Place (Washington, DC)
- Charles Nob Hill (San Francisco, CA)
- Christini's Ristorante Italiano (Orlando, FL)

- Michel Richard Citronelle (Washington, DC)
- Clio (Boston, MA)
- Coi (San Francisco, CA)
- Daniel (New York, NY)
- Dominic’s (St. Louis, MO)
- Eleven Madison Park (New York, NY)
- Erna’s Elderberry House Restaurant (Oakhurst, CA)
- Escoffier Restaurant (Hyde Park, CA)
- Fandango (Pacific Grove, CA)
- Flagstaff House (Boulder, CO)
- Fore Street (Portland, ME)
- Gabriel’s (Highwood, IL)
- Gary Danko (San Francisco, CA)
- George’s at the Cove (La Jolla, CA)
- Giovanni’s on the Hill (St. Louis, MO)
- Goodfellow’s (Minneapolis, MN)
- Gramercy Tavern (New York, NY)
- Hamersley’s Bistro (Boston, MA)
- Handke’s Cuisine (Columbus, OH)
- Harrah’s Steak House (Reno, NV)
- Heathman Restaurant & Bar at the Heathman Hotel (Portland, OR)
- Hemingway’s (Killington, VT)
- Herbsaint Bar and Restaurant (New Orleans, LA)
- Higgins Restaurant & Bar (Portland, OR)
- Hotel Bel-Air Restaurant (Los Angeles, CA)
- Jack’s Oyster House (Albany, NY)
- James at the Mill (Johnson, AR)
- Janos Restaurant (Tucson, AZ)
- Jar (Los Angeles, CA)
- Jean Georges (New York, NY)
- Jeffrey’s (Austin, TX)
- JiRaffe (Santa Monica, CA)
- KC’s Restaurant (Cleveland, MS)
- Le Vichyssois (Lakemoor, IL)
- Lucques (Los Angeles, CA)
- Lumière (Newton, MA)
- Manresa (Los Gatos, CA)
- Mark’s American Cuisine (Houston, TX)
- McCrady’s (Charlotte, SC)
- Mélisse (Los Angeles, CA)
- Michael Mina Bellagio (Las Vegas, NV)
- Michael’s On East (Sarasota, FL)
- Mr. Stox (Anaheim, CA)
- Naha (Chicago, IL)

- Nana Restaurant (Dallas, TX)
- New Rivers (Providence, RI)
- No. 9 Park (Boston, MA)
- Nobu (New York, NY)
- North Pond (Chicago, IL)
- Peninsula Grill (Charleston, SC)
- Per Se (New York, NY)
- Picasso (Las Vegas, NV)
- Radius (Boston, MA)
- Regency Room at Williamsburg Inn (Williamsburg, VA)
- Restaurant August (New Orleans, LA)
- Restaurant Kevin Taylor (Denver, CO)
- Rioja (Denver, CO)
- Slightly North of Broad (Charleston, SC)
- Splendido at the Chateau (Avon-Beaver Creek, CO)
- Stella! (New Orleans, LA)
- The Boheme (Orlando, FL)
- The Dining Room at The Greenbrier (White Sulphur Springs, WV)
- The Slanted Door (San Francisco, CA)
- Thomas Henkelmann (Greenwich, CT)
- Town (New York, NY)
- Tradition by Pascal (Newport Beach, CA)
- Tribeca Grill (New York, NY)
- Tru (Chicago, IL)
- Uchi (Austin, TX)
- Vidalia (Washington, DC)
- Vincenzo’s (Louisville, KY)
- wd-50 (New York, NY)
- Zuni Cafe (San Francisco, CA)

98

FIVE- AND FOUR-DIAMOND AWARDS

98.1 Five-Diamnd Award Winners

AAA (www.aaa.com) first started listing lodging information in its travel publications in the early 1900s. In 1937, the first field inspectors were hired to assess hotels, motels, and restaurants. The current One- to Five-Diamond rating system was introduced in 1977.

AAA designated the following restaurants with Five Diamond ratings for 2012:

Arizona
- Kai (in the Sheraton Wild Horse Pas Resort & Spa, Chandler)

California
- Addison (in The Grand Del Mar, San Diego)
- Benu (San Francisco)
- Erna's Elderberry House Restaurant (in the Chateau du Sureau, Oakhurst)
- Gary Danko (San Francisco)
- The Belvedere (in The Peninsula Beverly Hills, Beverly Hills)
- The French Laundry (Yountville)
- The Kitchen Restaurant (Sacramento)

Colorado
- The Penrose Room (in The Broadmoor, Colorado Springs)

Connecticut
- Winvian (in the Winvian, Morris)

District of Columbia
- CityZen (in the Mandarin Oriental, Washington D.C., Washington)

Florida
- Salt (in the Ritz-Carlton, Amelia Island, Fernandina Beach)
- The Restaurant at The Four Seasons (in the Four Seasons Resort, Palm Beach)
- Victoria & Albert's (in Disney's Grand Floridian Resort & Spa, Lake Buena Vista)

Hawaii
- Chef Mavro (Honolulu)
- La Mer (in the Halekulani, Honolulu)

Illinois
- Alinea (Chicago)
- Arun's (Chicago)
- Everest (Chicago)
- Tru (Chicago)

Kentucky
- The Oakroom (in The Seelbach Hilton. Louisville)

Maine
- The White Barn Inn Restaurant (Kennebunk Beach)

Massachusetts
- L'Espalier (in the Mandarin Oriental, Boston)
- Menton (Boston)
- Wheatleigh's Dining Room (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)

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)
- Marea (New York)

North Carolina
- Heron's Restaurant (in The Umstead Hotel & Spa, Cary)
- The Fearrington House Restaurant (in The Fearrington House Inn, Fearrington Village)

Pennsylvania
- Fountain Restaurant (in the Four Seasons Hotel, Philadelphia)
- Lautrec (in the Nemacolin Woodlands Resort, Farmington)

Texas
- The French Room (in The Adolphus, Dallas)

Virginia
- The Inn at Little Washington Dining Room (Washington)

Washington
- The Herbfarm (Woodinville)

98.2 Four-Diamnd Award Winners

AAA designated the following restaurants with Four Diamond ratings for 2012:

Alabama
- 360 Grille (Florence)
- Bottega Restaurant (Birmingham)
- Cafe Dupont (Birmingham)
- Cotton Row Restaurant (Huntsville)
- FIRE Steakhouse (Atmore)
- Highlands Bar & Grill (Birmingham)
- Hot and Hot Fish Club (Birmingham)
- Ocean (Birmingham)
- The Grand Dining Room (Point Clear)
- The Trellis Room (Mobile)

Alaska
- Crow's Nest Restaurant (Anchorage)
- Marx Bros. Cafe (Anchorage)
- Seven Glaciers Restaurant (Girdwood)

Arizona
- Anthony's In The Catalinas (Tucson)
- Binkey's Restaurant (Cave Creek)
- BLT Steak (Scottsdale)
- Bourbon Steak (Scottsdale)
- Core Kitchen & Wine Bar (Marana)
- Cork Restaurant (Chandler)
- Deseo (Scottsdale)
- Different Pointe of View (Phoenix)
- Elements (Paradise Valley)
- Gold (Tucson)
- Il Terrazo (Scottsdale)
- J & G Steakhouse (Scottsdale)
- L'Auberge Restaurant on Oak Creek (Sedona)
- Lon's at the Hermosa (Paradise Valley)
- Main Dining Room at the Arizona Inn (Tucson)
- noca (Phoenix)

- Palm Court (Scottsdale)
- Posh Improvisational Cuisine (Scottsdale)
- Prado (Paradise Valley)
- Primo (Tucson)
- Quiessence (Phoenix)
- Sassi Ristorante (Scottsdale)
- Talavera (Scottsdale)
- T. Cook's (Phoenix)
- The Grill at Hacienda del Sol (Tucson)
- Wright's at the Biltmore (Phoenix)

Arkansas
- Ashleys at the Capital (Little Rock)
- James At The Mill (Johnson)

California
- Acquerello (San Francisco)
- Addison (San Diego)
- A.R. Valentien (La Jolla)
- Alexander's Steakhouse (Cupertino)
- Ame Restaurant (San Francisco)
- Argyle Steakhouse (Carlsbad)
- Aubergine at L'Auberge (Carmel-by-the-Sea)
- Bertrand at Mister A's (San Diego)
- Big 4 Restaurant (San Francisco)
- Bouchon (Beverly Hills)
- Boulevard (San Francisco)
- Campton Place Restaurant (San Francisco)
- Cielo (Cabazon)
- Coi (San Francisco)
- Culina Modern Italian (Los Angeles)
- Cut by Wolfgang Puck (Beverly Hills)
- Domaine Chandon (Yountville)
- Donovan's Steak & Chop House (La Jolla)
- Dry Creek Kitchen (Healdsburg)
- Duane's Prime Steaks & Seafood (Riverside)
- Etoile at Domaine Chandon (Yountville)
- Europa Restaurant at the Villa Royale Inn (Palm Springs)
- Farmhouse Restaurant (Forestville)
- Fifth Floor (San Francisco)
- Fleur de Lys (San Francisco)
- Gennaro's Ristorante (Glendale)
- George's California Modern (La Jolla)
- Grant Grill (San Diego)

- Great Oak Steakhouse (Temecula)
- Hampton’s (Westlake Village)
- High Steaks Steakhouse (Lincoln)
- Jardiniere (San Francisco)
- jer-ne restaurant (Marina Del Rey)
- La Folie (San Francisco)
- Le Vallauris (Palm Springs)
- Madrona Manor Wine Country Inn & Restaurant (Healdsburg)
- Manresa (Los Gatos)
- Maravilla (Ojai)
- Masa’s (San Francisco)
- Melisse (Santa Monica)
- Michael Mina (San Francisco)
- Mille Fleurs (Rancho Santa Fe)
- Murray Circle (Sausalito)
- Napa Rose (Anaheim)
- Navio (Half Moon Bay)
- Pacific’s Edge (Carmel-by-the-Sea)
- Palm Terrace Restaurant (Newport Beach)
- Parallel 67 (San Francisco)
- Patina (Los Angeles)
- Quattro Restaurant & Bar (East Palo Alto)
- Raya (Dana Point)
- Saddle Peak Lodge (Calabasas)
- Saison (San Francisco)
- Sante (Sonoma)
- Sardine Factory (Monterey)
- Sirocco (Indian Wells)
- Sky Room (La Jolla)
- Spago Beverly Hills (Beverly Hills)
- Studio (Laguna Beach)
- The Ballard Inn Restaurant (Solvang)
- The Belvedere (Beverly Hills)
- The Blvd (Beverly Hills)
- The Californian (Huntington Beach)
- The Cellar (Fullerton)
- The Duck Club (Monterey)
- The Firehouse (Sacramento)
- The First Cabin At The Balboa Bay Club & Resort (Newport Beach)
- The French Poodle Restaurant (Carmel-by-the-Sea)
- The Kitchen Restaurant (Sacramento)
- The Plumed Horse (Saratoga)
- The Raymond Restaurant (Pasadena)
- The Ritz Restaurant and Garden (Newport Beach)

- The Sky Room (Long Beach)
- The Village Pub (Woodside)
- The Willows (Santa Ynez)
- Valentino Santa Monica (Santa Monica)
- Vivace (Carlsbad)
- Wally’s Desert Turtle (Rancho Mirage)

Colorado
- Alpenglow Stube (Keystone)
- Charles Court (Colorado Springs)
- Chefs Club by Food & Wine (Aspen)
- Colt & Gray (Denver)
- Edge Restaurant & Bar (Denver)
- Frasca (Boulder)
- Grouse Mountain Grill (Beaver Creek)
- Keystone Ranch Restaurant (Keystone)
- Mirabelle at Beaver Creek (Beaver Creek)
- Mizuna (Denver)
- Palace Arms (Denver)
- Panzano (Denver)
- Restaurant Kelly Liken (Vail)
- Restaurant Kevin Taylor (Denver)
- Rev Restaurant at Hotel Madeline Telluride (Telluride)
- Rioja (Denver)
- Spago (Beaver Creek)
- Splendido at the Chateau (Beaver Creek)
- Summit (Colorado Springs)
- Syzygy (Aspen)
- The Cliff House Restaurant (Manitou Springs)
- The Flagstaff House Restaurant (Boulder)

Connecticut
- Craftsteak (Ledyard)
- Fresh Salt (Old Saybrook)
- Octagon (Groton)
- Paragon (Mashantucket)
- Rebeccas (Greenwich)
- Stonehenge Inn and Restaurant (Ridgefield)
- The Mayflower Inn Dining Room (Washington)
- Thomas Henkelmann (Greenwich)

Delaware
- The Green Room (Wilmington)

District of Columbia

- adour (Washington)
- Bourbon Steak (Washington)
- Komi (Washington)
- Marcel's (Washington)
- Westend Bistro by Eric Ripert (Washington)

Florida

- A Land Remembered (Orlando)
- Area 31 (Miami)
- Armani's (Tampa)
- Arturo's Ristorante (Boca Raton)
- Atlantic's Edge (Islamorada)
- Atrio (Miami)
- Azul (Miami)
- Azurea (Atlantic Beach)
- Barton G. The Restaurant (Miami Beach)
- Bull & Bear Prime Steakhouse (Orlando)
- Cafe Boulud (Palm Beach)
- Cafe Marquesa (Key West)
- Casa Tua (Miami Beach)
- Cala Bella (Orlando)
- Caretta on the Gulf (Clearwater Beach)
- Christini's Ristorante Italiano (Orlando)
- Cioppino (Key Biscayne)
- db Bistro Moderne (Miami)
- East End Brasserie (Fort Lauderdale)
- Fish Out of Water (Santa Rosa Beach)
- Gibraltar (Coconut Grove)
- Gotham Steak (Miami Beach)
- Hakkasan (Miami Beach)
- Hollywood Prime (Hollywood)
- Hot Tin Roof (Key West)
- Il Mulino New York (Sunny Isles Beach)
- Ireland's Steakhouse (Weston)
- J & G Grill (Bal Harbour)
- Kathy's Gazebo Cafe (Boca Raton)
- Latitudes (Key West)
- Lemonia (Naples)
- Luma on Park (Winter Park)
- Maritana Grille (St. Pete Beach)
- Matthew's Restaurant (Jacksonville)
- Michael's On East (Sarasota)
- Michy's (Miami)

- Neomi’s Grill (Sunny Isles Beach)
- Norman’s At The Ritz-Carlton (Orlando)
- Palme d’Or (Coral Gables)
- Paradiso Restaurant (Lake Worth)
- Pisces (Key West)
- Primo (Orlando)
- Rainbow Palace (Fort Lauderdale)
- Restaurant Medure (Ponte Vedra Beach)
- Red The Steakhouse South Beach (Miami Beach)
- Sale e Pepe (Marco Island)
- Scarpetta (Miami Beach)
- Seagar’s Prime Steaks and Seafood (Destin)
- SideBern’s (Tampa)
- Sugarcane Raw Bar Grill (Miami)
- Tantra (Miami Beach)
- The Boheme (Orlando)
- The Dining Room at Little Palm Island (Big Pine Key)
- The Grill (Naples)
- The Restaurant (Palm Beach)
- The Restaurant at The Setai (Miami Beach)
- The Venetian Room (Lake Buena Vista)
- Timo (Sunny Isles Beach)
- Todd English’s Bluezoo (Lake Buena Vista)
- Via Luna (Fort Lauderdale)

Georgia
- Aria (Atlanta)
- Atlanta Grill (Atlanta)
- Bacchanalia (Atlanta)
- BLT Steak (Atlanta)
- Canoe (Atlanta)
- Georgia’s Bistro (Greensboro)
- La Grotta Ravinia Ristorante Italiano (Atlanta)
- La Grotta Ristorante Italiano (Atlanta)
- Nan Thai Fine Dining (Atlanta)
- Nikolai’s Roof (Atlanta)
- Park 75 at the Four Seasons (Atlanta)
- Restaurant Eugene (Atlanta)

Hawaii
- Azul (Kapolei)
- Bali Steak & Seafood (Honolulu)
- Brown’s Beach House (Kohala Coast)
- Hoku’s (Honolulu)

- La Mer (Honolulu)
- Orchids (Honolulu)
- Pahu i'a (Kaupulehu)
- Sarento's on the Beach (Kihei)
- Spago (Wailea)
- The Banyan Tree (Kapalua)
- The Dining Room (Lanai City)

Idaho
- Beverly's (Coeur D'Alene)

Illinois
- Blackbird (Chicago)
- Boka (Chicago)
- Courtright's Restaurant (Willow Springs)
- L2O (Chicago)
- Les Nomades (Chicago)
- Lockwood Restaurant (Chicago)
- mk (Chicago)
- moto (Chicago)
- NAHA (Chicago)
- Next Restaurant (Chicago)
- NoMI (Chicago)
- Shanghai Terrace (Chicago)
- Sixteen (Chicago)
- Spiaggia (Chicago)
- Tallgrass (Lockport)
- Topolobampo (Chicago)
- Zealous (Chicago)

Indiana
- Joseph Decuis (Roanoke)
- LaSalle Grill (South Bend)
- Restaurant Tallent (Bloomington)
- The Carriage House Dining Room (South Bend)

Kentucky
- Corbett's - An American Place (Louisville)
- The English Grill (Louisville)
- Vincenzo's Restaurant (Louisville)
- Z's Oyster Bar & Steakhouse (Louisville)

Louisiana
- Commander's Palace (New Orleans)

- Emeril's (New Orleans)
- Emeril's Delmonico Restaurant & Bar (New Orleans)
- Restaurant August (New Orleans)
- Restaurant Revolution (New Orleans)
- Stella! (New Orleans)
- The Grill Room (New Orleans)

Maine
- Arrows Restaurant (Ogunquit)
- Back Bay Grill (Portland)
- Earth (Kennebunkport)
- Fore Street (Portland)
- Harstone Inn (Camden)
- Hugo's Restaurant (Portland)
- Michelle's Fine Dining (Bar Harbor)
- Natalie's (Camden)
- Primo (Rockland)
- the Salt Exchange (Portland)

Maryland
- Charleston (Baltimore)
- Sherwood's Landing (St. Michaels)
- Volt (Frederick)

Massachusetts
- Asana (Boston)
- Aura (Boston)
- Blantyre Main Dining Room (Lenox)
- Clio (Boston)
- Left Bank (Tyngsboro)
- Mamma Maria (Boston)
- Market by Jean-Georges (Boston)
- Meritage (Boston)
- Miel (Boston)
- Mooo.... (Boston)
- No. 9 Park (Boston)
- Pigalle (Boston)
- Radius (Boston)
- Rialto (Cambridge)
- Sibling Rivalry (Boston)
- The Cafe (Boston)
- The Old Inn on the Green (New Marlborough)
- Topper's (Nantucket)
- twenty-eight Atlantic (East Harwich)

Michigan
- Cafe' Cortina (Farmington Hills)
- Cygnus 27 (Grand Rapids)
- Iridescence Restaurant (Detroit)
- Rugby Grille (Birmingham)
- The Lark (West Bloomfield)

Minnesota
- Cosmos (Minneapolis)
- La Belle Vie (Minneapolis)
- Travail Kitchen and Amusements (Robbinsdale)

Mississippi
- BR Prime (Biloxi)
- Jia (Biloxi)
- Purple Parrot Café (Hattiesburg)
- thirty-two (Biloxi)
- Tien (Biloxi)

Missouri
- Bluestem Restaurant (Kansas City)
- Cielo Restaurant (St. Louis)
- Giovanni's on the Hill (St. Louis)
- Niche (Clayton)
- The American Restaurant at Crown Center (Kansas City)
- The Grill (Clayton)
- Tony's (St. Louis)

Nevada
- Alizé (Las Vegas)
- Andre's Las Vegas (Las Vegas)
- Aureole (Las Vegas)
- B & B Ristorante (Las Vegas)
- Bartolotta Ristorante di Mare (Las Vegas)
- Botero (Las Vegas)Carnevino (Las Vegas)
- Ciera Steak & Chop House (Stateline)
- Craftsteak (Las Vegas)
- CUT by Wolfgang Puck (Las Vegas)
- Eiffel Tower Restaurant (Las Vegas)
- Jasmine (Las Vegas)
- L'Atelier de Joël Robuchon (Las Vegas)
- Michael Mina (Las Vegas)
- Michael's Gourmet Room (Las Vegas)

- Mix (Las Vegas)
- Nobhill (Las Vegas)
- Pearl (Las Vegas)
- Prime Steakhouse (Las Vegas)
- Sage (Las Vegas)
- Seablue (Las Vegas)
- Sensi (Las Vegas)
- Shibuya (Las Vegas)
- Stripsteak (Las Vegas)
- SW Steakhouse (Las Vegas)
- The Country Club - A New American Steakhouse (Las Vegas)
- Wing Lei (Las Vegas)

New Hampshire
- Bedford Village Inn Restaurant (Bedford)
- Mountain View Grand Resort and Spa Main Dining Room (Whitefield)
- The Inn at Thorn Hill (Jackson)
- The Dining Room at The Omni Bretton Arms Inn (Bretton Woods)
- The Dining Room at The Omni Mount Washington Hotel (Bretton Woods)
- The Manor Dining Room (Holderness)
- Wentworth Dining Room (Jackson)

New Jersey
- David Burke Fromagerie (Rumson)
- Il Capriccio (Whippany)
- Pluckemin Inn (Bedminster)
- Rat's (Hamilton)
- Restaurant Nicholas (Red Bank)
- Restaurant Serenade (Chatham)
- Stage Left (New Brunswick)
- The Bernards Inn (Bernardsville)
- The Frog and the Peach (New Brunswick)
- The Manor (West Orange)

New Mexico
- Fuego (Santa Fe)
- Geronimo (Santa Fe)
- Terra (New Mexico)

New York
- A Voce Columbus (New York)
- Adour Alain Ducasse at The St. Regis New York (New York)
- Ai Fiori (New York)
- Aquavit (New York)

- Arabelle (New York)
- Asiate (New York)
- Aureole (New York)
- Babbo (New York)
- BLT Steak (New York)
- Blue Hill (New York)
- BondSt (New York)
- Bouley (New York)
- Brushstroke (New York)
- Cafe Boulud (New York)
- City Hall (New York)
- Colicchio & Sons (New York)
- Craft (New York)
- David Burke Townhouse (New York)
- db Bistro Moderne (New York)
- Dovetail (New York)
- Gilt (New York)
- Gordon Ramsay at The London (New York)
- Gotham Bar and Grill (New York)
- Gramercy Tavern (New York)
- Junoon Restaurant (New York, NY)
- La Grenouille (New York)
- La Panetiere (Rye)
- Le Cirque (New York)
- Manzo (New York)
- Nobu (New York)
- North End Grill (New York)
- Oceana (New York)
- One If By Land, Two If By Sea (New York)
- Picholine (New York)
- River Cafe (Brooklyn)
- Rogue Tomate (New York)
- Scalini Fedili (New York)
- Scrimshaw at The Desmond (Colonie)
- South Gate (New York)
- Taste Albany (Albany)
- Telepan (New York)
- The Four Seasons (New York)
- The Inn at Erlowest (Lake George)
- The View Restaurant (Lake Placid)
- TOKU Modern Asian (Manhasset)
- Wallse Restaurant (New York)
- WD-50 (New York)
- Wildflowers (Verona)

North Carolina
- 1895 Grille (Pinehurst)
- Bonterra Dining & Wine Room (Charlotte)
- Carolina Crossroads Restaurant (Chapel Hill)
- Chef and The Farmer (Kinston)
- Four Square Restaurant (Durham)
- Gamekeeper Restaurant & Bar (Boone)
- Horizons (Asheville)
- Il Palio Ristorante (Chapel Hill)
- Madison's Restaurant & Wine Bar (Highlands)
- McNinch House (Charlotte)
- Second Empire Restaurant & Tavern (Raleigh)
- The Fairview Dining Room (Durham)
- Zebra Restaurant and Fine Catering (Charlotte)

North Dakota
- HoDo Restaurant (Fargo)

Ohio
- Boca Restaurant (Cincinnati)
- Lola (Cleveland)
- M (Columbus)
- Nicola's (Cincinnati)
- Orchids at Palm Court (Cincinnati)
- Ristorante Giovanni's (Beachwood)
- The Celestial Steakhouse (Cincinnati)
- The Leopard Restaurant (Aurora)
- The Palace Restaurant (Cincinnati)
- The Refectory Restaurant & Bistro (Columbus)

Oklahoma
- Polo Grill (Tulsa)
- The Coach House (Oklahoma City)

Oregon
- Noisette Restaurant (Portland)
- The Painted Lady (Newberg)

Pennsylvania
- 10 Arts Bistro & Lounge by Eric Ripert (Philadelphia)
- Aqueous (Farmington)
- Barclay Prime (Philadelphia)
- Circular Dining Room (Hershey)

- Eleven (Pittsburgh)
- Lacroix at The Rittenhouse (Philadelphia)
- Le Bec-Fin (Philadelphia)
- Morimoto (Philadelphia)
- Moshulu (Philadelphia)
- Patsel's (Clarks Summit)
- Savona (West Conshohocken)
- Swann Lounge & Cafe (Philadelphia)
- The Commonwealth Room (York)
- The French Manor (South Sterling)
- The Golden Sheaf (Harrisburg)
- The Settlers Inn at Bingham Park (Hawley)
- Vetri (Philadelphia)
- XIX (Nineteen) Restaurant (Philadelphia)

Rhode Island
- Gracies (Providence)
- Muse by Jonathan Cartwright (Newport)
- Seasons at the Ocean House (Watch Hill)
- Spiced Pear Restaurant (Newport)

South Carolina
- Charleston Grill (Charleston)
- Circa 1886 (Charleston)
- Cypress (Charleston)
- Divine Prime (Myrtle Beach)
- Grill 225 (Charleston)
- Hall's Chophouse (Charleston)
- Langdon's Restaurant and Wine Bar (Mount Pleasant)
- Ocean Room (Kiawah Island)
- Old Fort Pub (Hilton Head Island)
- Palmetto Cafe (Charleston)
- Passion 8 Bistro (Fort Mill)
- Peninsula Grill (Charleston)
- Rick Erwin's Nantucket Seafood grill (Greenville)
- The Dining Room at Abingdon Manor (Latta)
- Tristan (Charleston)

Tennessee
- Capitol Grille (Nashville)
- Chez Philippe (Memphis)
- St. John's Restaurant (Chattanooga)
- The Orangery (Knoxville)

Texas
- Abacus (Dallas)
- Antlers Lodge (San Antonio)
- Bijoux (Dallas)
- Bohanan's Prime Steak and Seafood (San Antonio)
- Bolla at The Stoneleigh Hotel & Spa (Dallas)
- Brennan's of Houston (Houston)
- Cafe on the Green (Irving)
- Christopher's World Grille (Bryan)
- Citrus (San Antonio)
- DaMarco (Houston)
- Fearing's (Dallas)
- Fig Tree Restaurant (San Antonio)
- Francesca's at Sunset (San Antonio)
- Hill Country Dining Room (Austin)
- Hotel St. Germain (Dallas)
- Las Canarias Restaurant (San Antonio)
- Mark's American Cuisine (Houston)
- Noé Restaurant & Bar (Houston)
- Ostra (San Antonio)
- Pappas Bros. Steakhouse (Houston)
- Pyramid Restaurant & Bar (Dallas)
- Quattro (Houston)
- Shearn's Restaurant (Galveston)
- Sustenio (San Antonio)
- T/X Restaurant (Dallas)
- The Driskill Grill (Austin)
- The Inn at Dos Brisas (Washington)
- The Landmark Restaurant (Dallas)
- The Mansion Restaurant at Rosewood Mansion (Dallas)
- The Remington Restaurant (Houston)
- The Republic (College Station)
- The Steakhouse (Galveston)
- Tony's (Houston)
- Trio (Austin)
- Valentino (Houston)

Utah
- Apex Restaurant (Park City)
- Blue Boar Restaurant (Midway)
- Chef's Table (Orem)
- Forage Restaurant (Salt Lake City)
- Goldener Hirsch Restaurant (Park City)
- Glitretind (Park City)

- Grappa Italian Restaurant (Park City)
- J&G Grill at St. Regis (Park City)
- La Caille (Sandy)
- Log Haven (Salt Lake City)
- Riverhorse on Main (Park City)
- The Mariposa (Park City)
- The Paris Bistro (Salt Lake City)
- Tree Room at Sundance Resort (Provo)

Vermont
- 275 Main (Warren)
- Rabbit Hill Inn Dining Room (Lower Waterford)
- Solstice (Stowe)
- The Red Rooster (Woodstock)
- Windham Hill Restaurant (West Townshend)

Virginia
- 2941 Restaurant (Falls Church)
- Fat Canary (Williamsburg)
- Fossett's (Keswick)
- L'Auberge Chez Francois & Jacques Brasserie (Great Falls)
- L'Auberge Provencale (White Post)
- Lemaire (Richmond)
- Restaurant Eve (Alexandria)
- Salacia (Virginia Beach)
- Terrapin (Virginia Beach)
- The Old Mill Room (Charlottesville)
- The Regency Dining Room (Williamsburg)

Washington
- Canlis (Seattle)
- Masselow's (Airway Heights)
- Rover's Restaurant (Seattle)
- Sun Mountain Lodge Dining Room (Winthrop)
- The Dining Room at Salish Lodge & Spa (Snoqualmie)
- The Georgian (Seattle)
- Tulalip Bay (Marysville)

West Virginia
- Bavarian Inn Dining Room (Shepherdstown)

Wisconsin
- Sanford Restaurant (Milwaukee)
- The Immigrant Restaurant & Winery (Kohler)

Wyoming

- The Wild Sage (Jackson)
- Westbank Grill (Teton Village)

99

FUTURE 50

99.1 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).

99.2 Fastest Growing Chains 2012

1. Orange Leaf Frozen Yogurt
2. Shake Shack
3. Cooper's Hawk Winery & Restaurants
4. Jake's Wayback Burgers
5. Muscle Maker Grill
6. Stanford's Restaurant & Bar
7. Zoës Kitchen
8. Sarpino's Pizzeria
9. Twin Peaks
10. Nothing Bundt Cakes
11. Lazy Dog Café
12. The Wing Warehouse
13. Pret A Manger
14. Crumbs Bake Shop
15. Eddie V's Prime Seafood
16. Costa Vida Fresh Mexican Grill
17. Zoup! Fresh Soup Company
18. Specialty's Café & Bakery
19. American Deli
20. Chop't Creative Salad Company
21. Anthony's Coal Fired Pizza
22. Flat Top Grill
23. Filiberto's Mexican Food
24. Bru's Room Sports Grill
25. Loving Hut
26. The Egg & I Restaurants
27. Happy's Pizza
28. Amato's Pizza

29. Burtons Grill
30. Toppers Pizza
31. Another Broken Egg Cafe
32. Gyu-Kaku
33. Capriotti's Sandwich Shop
34. Chronic Tacos
35. Jimmy's Egg Restaurant
36. The Rock Wood Fired Pizza & Spirits
37. Stevi B's - The Ultimate Pizza Buffet
38. Rudy's Country Store and Bar-B-Q
39. Zio's Italian Kitchen
40. Rosa Mexicano Restaurants
41. Roosters
42. Scooter's Coffeehouse
43. Brixx Wood Fired Pizza
44. Olga's Kitchen
45. Show-Me's
46. Dion's Pizza
47. Lou Malnati's
48. Ri Ra Irish Pub
49. Hurricane Grill & Wings
50. Cru - A Wine Bar

99.3 Market Resources

Restaurant Business, 90 Broad Street, Suite 402, New York, NY 10004. (630) 574-5075. (www.monkeydish.com)

100

GREAT STEAK HOUSES

100.1 Overview

Since 1994, Independent Retail Cattleman's Association (www.greatsteakofna.com) has recognized the Great Steak Houses of North America.

100.2 List Of Recognitions 2013

- Benjamin Steak House (New York, NY; White Plains, NY)
- Gene & Georgetti (Chicago, IL)
- Grill 225 (Charleston, SC)
- III Forks (Austin, TX; Dallas, TX; Houston, TX; Hallandale, FL; Jacksonville, FL; Palm Beach Gardens, FL)
- 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)

101

HOT CONCEPTS!

101.1 Award Recipients 2012

Each year the editors of *Nation's Restaurant News* select emerging restaurant brands that have distinguished themselves as Hot Concepts!

The following brands were given the Hot Concept! designation in 2012:

- Coolhaus
- Del Frisco's Grille
- Pie Five Pizza Co.
- Stacked Food Well Built

101.2 Recent Designations

Restaurant brands selected for past Hot Concept! designation are as follows:

2011

- Crave
- FöD
- Mixt Greens
- True Food Kitchen
- Twisted Root Burger Co.

2010

- Cooper's Hawk Winery & Restaurant
- Pizza Fusion
- Shake Shack
- Twin Peaks

2009

- Red Mango
- Smashburger
- The Lazy Dog Cafe
- Tutta Bella Neapolitan Pizzeria
- Vino Volo

2008

- Chop't Creative Salad Company
- Jasper's
- Organic To Go
- The Counter
- Vapiano's International

2007

- Go Roma Italian Kitchen
- Granite City Food & Brewery
- The Grape
- Gyu-Kaku Japanese BBQ
- Which Wich?
- WingStreet

2006

- Cheeseburger in Paradise
- Pandini's
- RedBrick Pizza
- Seasons 52
- Spicy Pickle
- Summer Shack

2005

- Caffé Ritazza
- Cafe Spice
- Offerdahl's Cafe Grill
- Redstone American Grill
- Sauce Pizza & Wine
- Up The Creek Fish Camp & Grill
- Zoup! Fresh Soup Company

2004

- Crescent City
- Fox Sports Grill
- Jazzman's Cafe
- Moe's Southwest Grill
- O'Naturals
- Thaifoon Taste of Asia

2003
- Fogo de Chão
- Grand Lux Cafe
- Pei Wei Asian Diner
- Raising Cane's Chicken Fingers
- Smokey Bones BBQ
- Ted's Montana Grill

2002
- Brio Tuscan Grille
- Fresh City
- Genghis Grill
- Pallino Pastaria Company
- Stonewood Tavern and Grill
- Yard House

2001
- ESPN Zone
- Figs Restaurant
- Fire & iCE
- Nick & Stef's
- Noodles & Company
- Samba Room

2000
- Big Bowl
- Fleming's Prime Steakhouse
- Fuzio Universal Pasta
- House of Bread
- Maui Tacos
- Naked Fish Restaurants
- Nobu
- Not Your Average Joe's

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

102

JAMES BEARD FOUNDATION AWARDS

102.1 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.

102.2 Award Winners 2012

Outstanding Restaurant
- Boulevard (San Francisco, CA)

Best New Restaurant
- Next (Chicago, IL)

Outstanding Chef
- Daniel Humm (Eleven Madison Park; New York, NY)

Rising Star Chef
- Christina Tosi (Momofuku Millk Bar; New York, NY)

Outstanding Pastry Chef
- Mindy Segal (Mindy's HotCholcolate; Chicago, IL)

Best Chef: Great Lakes
- Bruce Sherman (North Pond; Chicgao, IL)

Best Chef: Mid-Atlantic
- Maricel Presilla (Cucharamama; Hoboken, NJ)

Best Chef: Midwest
- Tory Miller (L'Etoile; Madison, WI)

Best Chef: New York City
- Michael Anthony (Gramercy Tavern; New York, NY)

Best Chef: Northeast
- Tim Cushman (O Ya, Boston, MA)

Best Chef: Northwest
- Matt Dillon (Sitka & Spruce; Seattle, WA)

Best Chef: Pacific
- Matt Molina (Osteria Mozza; Los Angeles, CA)

Best Chef: South
- Chris Hastings (Hot and Hot Fish Club; Birmingham, AL)

Best Chef: Southeast
- Hugh Acheson (Five and Ten; Athens, GA)
- Linton Hopkins (Restaurant Eugene; Atlanta, GA)

Best Chef: Southwest
- Paul Qui (Uchiko; Austin, TX)

102.3 Recent Award Winners

Outstanding Restaurant
- 2011: Eleven Madison Park (New York, NY)
- 2010: Daniel (New York, NY)
- 2009: Jean Georges (New York, NY)
- 2008: Gramercy Tavern (New York, NY)
- 2007: Frontera Grill (Chicago, IL)

Best New Restaurant
- 2011: ABC Kitchen (New York, NY)
- 2010: Marea (New York, NY)
- 2009: Momofuku Ko (New York, NY)
- 2008: Central Michel Richard (Washington, DC)
- 2007: L'Atelier de Joël Robuchon (Las Vegas, NV)

Outstanding Chef
- 2011: José Andrés (minibar; Washington, DC)
- 2010: Tom Colicchio (Craft; New York City)
- 2009: Dan Barber (Blue Hill; New York, NY)
- 2008: Grant Achatz (Alinea; Chicago, IL)
- 2007: Michel Richard (Michel Richard Citronelle; Washington, DC)

Rising Star Chef

- 2011: Gabriel Rucker (Le Pigeon; Portland, OR)
- 2010: Timothy Hollingsworth (The French Laundry; Yountville, CA)
- 2009: Nate Appleman (A16; San Francisco, CA)
- 2008: Gavin Kaysen (Cafe Boulud; New York, NY)
- 2007: David Chang (Momofuku Noodle Bar; New York, NY)

Outstanding Pastry Chef

- 2011: Angela Pinkerton (Eleven Madison Park; New York, NY)
- 2010: Nicole Plue (Redd; Yountville, CA)

102.4 Market Resources

James Beard Foundation, 167 West 12th Street, New York, NY 10011. (212) 675-4984. (www.jamesbeard.org)

103

MENU MASTERS

103.1 Overview

Selected annually by *Nation's Restaurant News*, the Menu Masters Awards honor companies and individuals that have created the most successful new menu developments. This chapter lists current and recent award winners.

103.2 Winners By Category

Best Healthy Innovations

- 2012: The Cheesecake Factory: SkinnyLicious Menu
- 2011: Subway
- 2010: KFC
- 2009: Qdoba's Smart Meals
- 2008: University of Connecticut's Department of Dining Services
- 2007: Chartwells
- 2006: Williamson Hospitality Services
- 2005: T.G.I. Friday's
- 2004: Ruby Tuesday, Inc.
- 2003: Applebee's Neighborhood Grill & Bar
- 2002: Ground Round
- 2001: Fresh Choice
- 2000: Chili's
- 1999: Jamba Juice

Best Limited-Time Offer

- 2012: Quaker Steak & Lube: Shake, Wrap & Roll!
- 2011: Popeyes Louisiana Kitchen
- 2010: Red Robin Gourmet Burgers
- 2009: Denny's
- 2008: Burger King
- 2007: Golden Corral
- 2006: Taco Bell
- 2005: Panera Bread
- 2004: 99 Restaurant & Pub
- 2003: Round Table Pizza
- 2002: McDonald's

- 2001: T.G.I. Friday’s
- 2000: Wyndham Hotels & Resorts
- 1999: Wolfgang Puck Cafe
- 1998: Cracker Barrel

Best Menu Revamp
- 2012: Buffalo Wild Wings: Customize Your Grub
- 2011: Old Chicago Pizza & Pasta
- 2010: Tropical Smoothie Cafe
- 2009: Pizza Hut
- 2008: O’Charley’s
- 2007: Captain D’s Seafood
- 2006: Ruby Tuesday
- 2005: Logan’s Roadhouse
- 2004: Olive Garden
- 2003: Bob Evans
- 2002: Claim Jumper
- 2001: Bennigan’s
- 2000: Denny’s
- 1999: Stephen Anderson
- 1998: Legal Sea Foods

Best Menu/Line Extension
- 2012: Wendy’s: The “W” Cheeseburger
- 2011: Shari’s Restaurant & Pies
- 2010: Au Bon Pain
- 2009: Chick-fil-A
- 2008: Red Lobster
- 2007: Jack in the Box
- 2006: Boston Market
- 2005: Uno Chicago Grill
- 2004: IHOP
- 2003: Schlotzsky’s Deli
- 2002: Panera Bread
- 2001: Subway Restaurants
- 2000: Domino’s Pizza
- 1999: Popeye’s Chicken & Biscuits
- 1998: California Pizza Kitchen

Best Menu Trendsetter
- 2012: Mama Fu’s: Bánh Mi Vietnamese Street Sandwich
- 2011: UMass Dining
- 2010: Burgerville

Best New Menu Item

- 2012: Sonic Corp.: Premium Beef Dogs
- 2011: Panda Express
- 2010: Outback Steakhouse
- 2009: Culver's
- 2008: Maggiano's Little Italy
- 2007: Dunkin' Donuts
- 2006: California Pizza Kitchen
- 2005: Jack in the Box
- 2004: Famous Dave's
- 2003: P.F. Chang's China Bistro
- 2002: The Cheesecake Factory
- 2001: Champps
- 2000: Bob Evans
- 1999: Einstein Bros. Bagels
- 1998: Wendy's International

Chef/Innovator

- 2012: Stan Frankenthaler: Vice President, Global Product Innovation and Culinary for Dunkin' Brands
- 2011: Scott Davis
- 2010: Brad Blum
- 2009: David Burke
- 2008: Paul Carr
- 2007: Cliff Pleau
- 2006: Dan Coudreaut
- 2005: Kurt Hankins
- 2004: Oona Settembre
- 2003: Robert Okura
- 2002: Stephen Anderson
- 2001: Johnny Law

Menu Masters Hall of Fame

- 2012: Jose Garces: Owner of Garces Restaurant Group (Philadelphia)
- 2011: Tom Colicchio
- 2010: Jon Luther
- 2009: Wolfgang Puck
- 2008: Roger Berkowitz
- 2007: Burt Cutino
- 2006: Chef Emeril Lagasse
- 2005: David Overton
- 2004: Chef Martin Yan
- 2003: Paul Prudhomme
- 2002: Jasper White

- 2001: Richard Melman
- 2000: Jacques Pepin
- 1999: Colonel Sanders
- 1998: Warren LeRuth

103.3 Market Resources

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

104

MICHELIN 3-STAR RESTAURANTS

104.1 Overview

Michelin published its first guide in 1900 in France. In 2005, The Michelin Guide expanded to include the U.S., with a guide to New York. Guides for San Francisco and Chicago have also been introduced.

Beginning in 1926, Michelin began reviewing and rating restaurants with 1-star, 2-star, and 3-star ratings. This chapter presents the 3-star-rated restaurants in the Chicago, New York, and San Francisco for 2012.

104.2 Chicago 3-Star Restaurants

- Alinea

104.3 New York 3-Star Restaurants

- Chef's Table at Brooklyn Fare (Brooklyn)
- Daniel
- Eleven Madison Park
- Jean Georges
- Masa
- Per Se

104.4 San Francisco 3-Star Restaurants

- The French Laundry (Napa region)
- The Restaurant at Meadowood (Napa region)

105

MILLENNIALS' FAVORITE RESTAURANT CHAINS

105.1 Overview

As part of the May 2012 study *Understanding the Foodservice Attitudes and Behaviors of Millennials*, Technomic (www.technomic.com) surveyed Millennials (ages 19-to-34) to determine their favorite chain restaurant brands. The survey evaluated three attributes, as follows:

Food Quality

- For Millennials, food quality goes beyond taste and visual appeal, also incorporating sourcing elements such as grass-fed and free-range into their quality perception.

Social Responsibility

- Acting in a socially responsible manner includes the management of operations that are good for the environment and treating employees well.

Support Of Local Community Activities

- Emphasis is placed on support of community organizations and making charitable contributions.

> **"Millennials visit restaurants more frequently than any other generation. Millennials are unique. They communicate differently, are self-expressive, confident, liberal, upbeat, and open to change. But marketing to them can be a challenge. This group has a distinct perspective on dining occasions, placing more value on attributes like social responsibility, sustainability, local, and organic, grass-fed, and hormone-free offerings. They foster emotional connections to brands and their loyalty stems beyond experience."**
>
> Darren Tristano, Exec. V.P.
> Technomic, 5/10/12

105.2 Favorite Restaurant Chains

Food Quality

- Quick-service: Jimmy John’s Gourmet Sandwich Shop
- Fast-casual: McAlister’s Deli
- Family-style: Cracker Barrel Old Country Store
- Casual-dining: Red Lobster

Social Responsibility

- Quick-service: In-N-Out Burger
- Fast-casual: McAlister’s Deli
- Family-style: Cracker Barrel Old Country Store
- Casual-dining: Logan’s Roadhouse

Support Of Local Community Activities

- Quick-service: Chik-fil-A
- Fast-casual: Corner Bakery Cafe
- Family-style: Bob Evans
- Casual-dining: Bonefish Grill

105.3 Market Resources

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

106

RESTAURANT NEIGHBOR AWARD

106.1 Award Winners 2012

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.

With the Restaurant Neighbor Award, the National Restaurant Association and American Express annually salute restaurateurs who go above and beyond in giving back to their communities. The following are the 2012 award-winning restaurant operators:

National Large Business Winner

- Aramark (Philadelphia, PA)

Cornerstone Humanitarian of the Year

- Cornerstone Humanitarian: Tammy and Noel Cunningham, Strings Restaurant (Denver, CO)

The following restaurant operators were also recognized by the National Restaurant Association in 2012 for their community-focused contributions:

Arizona

- Desert Taco/Del Taco (Scottsdale)
- Flancer's (Gilbert)

California

- BJ's Restaurants Inc. (Huntington Beach)
- Gala Corp. (Costa Mesa)

Colorado

- Geta Asfaw, McDonald's franchisee (Denver)
- S&S Restaurant Group Inc. dba Carmine's on Penn (Denver)
- Tammy and Noel Cunningham, Strings Restaurant (Denver)

Pennsylvania

- Aramark (Philadelphia)

107

SELECTIONS: BON APPÉTIT

107.1 Overview

Bon Appétit magazine regularly compiles various lists of top food and beverages as well as restaurants and snack shops throughout the U.S. The following are the most recent lists:

107.2 Best Restaurant and Snack Shops Sepections

Best Cakes

- Alexis Baking Company (Napa, CA)
  Menu item: Blum's Coffee Crunch Cake
- Betty Bakery (Brooklyn, NY)
  Menu item: Lemon Cake
- Crixa (Berkeley, CA)
  Menu item: Black Forest Cake
- Cordúa restaurants (multiple locations)
  Menu item: Churrascos Tres Leches Cake
- Ken's Artisan Bakery (Portland, OR)
  Menu item: Canelés
- Lady M (New York, NY)
  Menu item: Mille Crêpes Cake
- Macrina (Seattle, WA)
  Menu item: Red Velvet Cake
- Miette (San Francisco, CA)
  Menu item: Tomboy Cake
- Peninsula Grill (Charleston, SC)
  Menu item: Coconut Layer Cake
- Salty Tart (Minneapolis, MN)
  Menu item: White Chocolate Lemon Blueberry Cake

Best Coffeeshops

- Abraço (New York, NY)
- Four Barrel Coffee (San Francisco, CA)
- Kopplin's Coffee (Saint Paul, MN)
- Lamill Coffee (Los Angeles, CA)

- Little T American Baker (Portland, OR)
- Novo (Denver, CO)
- Octane Coffee Bar & Lounge (Atlanta, GA)
- Peregrine Espresso (Washington, DC)
- Progress Coffee (Austin, TX)
- The Coffee Studio (Chicago, GA)

Best Doughnut Shops
- Bouchon Bakery (Yountville, CA)
- Coffee An' Donut Shop (Westport, NY)
- Dat Donuts (Chicago, IL)
- Doughnut Plant (New York, NY)
- Dynamo Donuts (San Francisco, CA)
- Kane's Donuts (Saugus, MA)
- Mighty-O Donuts (Seattle, WA)
- Randy's Donuts (Inglewood, CA)
- Round Rock Donuts (Round Rock, TX)
- The Donut Stop (St. Louis, MO)
- Voodoo Doughnut (Portland, OR)

Best Destination Diners
- Nickel Diner (Los Angeles, CA)
  Menu item: Maple-bacon doughnut
- Bite Café (Chicago, IL)
  Menu item: Breakfast poutine
- M. Wells (Long Island City, NY)
  Menu item: Foie gras grilled cheese
- Crossroads Diner (Dallas, TX)
  Menu item: Pickle-juice egg salad sandwich
- Citizen's Band (San Francisco, CA)
  Menu item: Braised pork belly and egg
- 24 Diner (Austin, TX)
  Menu item: Roasted banana and brown sugar milk shake

Best Germanic Restaurants
- Gruner (Portland, OR)
- Bar Tartine (San Francisco, CA)
- Leopold's (San Francisco, CA)
- Frankford Hall (Philadelphia, PA)
- Prime Meats (Brooklyn, NY)
- Cafe Katja (New York, NY)
- Seasonal (New York, NY)

Best Lobster Rolls
- Red Hook Lobster Pound (Washington, DC)
- Blue Plate Oysterette (Santa Monica, CA)
- Brick Alley Pub & Restaurant (Newport, RI)
- JCT Kitchen & Bar (Atlanta, GA)
- Perla Seafood & Oyster Bar (Austin, TX)
- Smack Shack Lobster (Minneapolis, MN)

Best New Jewish Delis
- Wise Sons Jewish Delicatessen (San Francisco, CA)
- Stopsky's Delicatessen (Mercer Island, WA)
- Rye Delicatessen & Bar (Minneapolis, MN)
- Mile End Delicatessen (New York, NY)

Best New Sushi Restaurants
- Arami (Chicago, IL)
- Bamboo Sushi (Portland, OR)
- Brushstroke (New York, NY)
- Kome Sushi Kitchen (Austin, TX)
- Masa Sushi & Robata (Minneapolis, MN)
- Miyake (Portland, ME)
- Shunji (Los Angeles, CA)
- Sushi Kappo Tamua (Seattle, WA)
- Tomo (Atlanta, GA)
- Uchi (Houston, TX)

Best Restaurants For Celebrity Sightings In Los Angeles
- The Tower Bar
- Cut
- The Bazaar by José Andrés
- Madeo
- Soho House
- Katsuya by Starck Hollywood
- Dan Tana's
- Joan's on Third
- The Polo Lounge
- Animal

Best Restaurants For Celebrity Sightings In New York
- Locando Verde
- The Spotted Pig
- ABC Kitchen
- Spice Market
- Bar Pitti

- Acme
- The Dutch
- The Waverly Inn
- Marlow & Sons
- Super Linda

108

SELECTIONS: DINERS, DRIVE-INS & DIVES

108.1 Overview

The Food Network has telecast the series Diners, Drive-Ins and Dives since 2006. In the episodes host Guy Fieri visits some of America's most interesting and unique restaurants. A list of restaurants featured in the show are presented in this chapter.

108.2 List Of Featured Restaurants

Alabama
- Gumbo Shack (Fairhope)
- Manci's Antique Club (Daphne)
- Panini Pete's (Fairhope)

Arizona
- Brandy's Restaurant & Bakery (Flagstaff)
- Chino Bandido (Phoenix)
- Giuseppe's Italian Kitchen (Phoenix)
- Haus Murphy's (Glendale)
- Joe's Farm Grill (Gilbert)
- La Piazza Al Forno (Glendale)
- Los Taquitos Grill (Phoenix)
- Matt's Big Breakfast (Phoenix)
- Over Easy (Phoenix)
- Roberto's Mexican Food (Phoenix)
- Salsa Brava (Flagstaff)
- Thee Pitts Again (Glendale)

California
- 900 Grayson Restaurant (Berkeley)
- Aldo's Harbor Restaurant (Santa Cruz)
- At Last Cafe (Long Beach)
- Aunt Mary's Cafe (Oakland)
- Baby Blues BBQ (Venice)
- Bette's Oceanview Diner (Berkeley)

- Blue Water Seafood Market & Grill (San Diego)
- Brats Brothers (Sherman Oaks)
- Broken Record (San Francisco)
- Bubba's Diner (San Anselmo)
- Burger Me (Truckee)
- Cafe Citti (Kenwood)
- Cafe Rolle (Sacramento)
- Catelli's (Geyserville)
- Dad's Kitchen (Sacramento)
- Dottie's True Blue Cafe (San Francisco)
- Duarte's Tavern (Pescadero)
- El Indio (San Diego)
- Emma Jean's Holland Burger Cafe (Victorville)
- Fab Hot Dogs (Reseda)
- Falafel's Drive-In (San Jose)
- Gaffey Street Diner (San Pedro)
- Gatsby's Diner (Sacramento)
- Giusti's (Walnut Grove)
- Gloria's Cafe (Los Angeles)
- Gorilla Barbeque (Pacifica)
- Gott's Roadside (St. Helena)
- Grubstake Diner (San Francisco)
- HRD Coffee Shop (San Francisco)
- Hank's Creekside Restaurant (Santa Rosa)
- Hob Nob Hill (San Diego)
- Hodad's (Ocean Beach)
- Jamie's Bar & Grill (Sacramento)
- Jax at the Tracks (Truckee)
- Jay Bee's Bar-B-Que (Gardena)
- Jimtown Store (Healdsburg)
- Joe's Cable Car (San Francisco)
- Johnny Garlic's (Santa Rosa)
- La Texanita (Santa Rosa)
- Lito's Mexican Restaurant (Santa Barbara)
- Mac's Fish & Chip Shop (Santa Barbara)
- Mama Cozza's (Anaheim)
- Mambo's Cafe (Glendale)
- Meal Ticket (Berkeley)
- Mom's Tamales (Los Angeles)
- Naglee Park Garage (San Jose)
- Nickel Diner (Los Angeles)
- North End Caffe (Manhattan Beach)
- Norton's Pastrami & Deli (Santa Barbara)
- Patrick's Roadhouse (Santa Monica)

- Paul’s Coffee Shop (Fountain Valley)
- Pete’s Breakfast House (Ventura)
- Pier 23 Cafe (San Francisco)
- Pizzeria Luigi (San Diego)
- Polka Restaurant & Catering (Los Angeles)
- Putah Creek Cafe (Winters)
- Q Restaurant (San Francisco)
- Rick & Ann’s Restaurant (Berkeley)
- Rocco’s Cafe (San Francisco)
- Rudy’s Can’t Fail Cafe (Emeryville)
- Russian River Pub (Forestville)
- Studio Diner (San Diego)
- Ramona Cafe (Ramona)
- Santa Cruz Diner (Santa Cruz)
- Savoy Cafe & Deli (Santa Barbara)
- Schellville Grill (Sonoma)
- Schooner or Later (Long Beach)
- Sol Food Puerto Rican Cuisine (San Rafael)
- Squeeze Inn (Sacramento)
- Sunflower Caffe (Sonoma)
- Tee Off Bar & Grill (San Francisco)
- The Golden Bear (Sacramento)
- The Golden State (Los Angeles)
- The Kitchen (Oxnard)
- The Oinkster (Eagle Rock)
- Tioli’s Crazee Burger (San Diego)
- Tommy’s Joynt (San Francisco)
- W.O.W - Worth Our Weight (Santa Rosa)
- Willie Bird’s Restaurant (Santa Rosa)

Colorado
- Bang! (Denver)
- Foolish Craig’s Cafe (Boulder)
- Lauer-Krauts (Brighton)
- Sam’s No. 3 (Denver)
- Steuben’s Food Service (Denver)
- The Bagel Delicatessen & Restaurant (Denver)
- The Sink (Boulder)
- Tocabe American Indian Eatery (Denver)

Connecticut
- Black Duck Cafe (Westport)
- Corey’s Catsup and Mustard (Manchester)
- Merritt Canteen Inc (Bridgeport)

- O'Rourke's Diner (Middletown)
- Super Duper Weenie (Fairfield)
- Valencia Luncheria (Norwalk)
- Wilson's Holy Smoke BBQ (Fairfield)

District of Columbia
- Comet Ping Pong (Washington)
- Tortilla Cafe (Washington)
- Tune Inn Restaurant & Bar (Washington)

Florida
- 11th Street Diner (Miami Beach)
- 13 Gypsies (Jacksonville)
- Alpine Steakhouse (Sarasota)
- Benny's Seafood Restaurant (Miami)
- Blue Marlin Fish House Restaurant (North Miami Beach)
- California Tacos To Go (Tampa)
- Culhane's Irish Pub (Atlantic Beach)
- Danny's All-American Diner (Tampa)
- Flakowitz of Boynton Bakery & Deli Restaurant (Boynton Beach)
- Grampa's Bakery & Restaurant (Dania Beach)
- Havana Hideout (Lake Worth)
- Jamaica Kitchen (Miami)
- Jose's Real Cuban Food (Bradenton)
- Keegan's Seafood Grille (Indian Rocks Beach)
- La Camaronera Restaurant & Fish Market (Miami)
- Metro Diner (Jacksonville)
- Tampa Bay Brewing Co. (Tampa)
- Munch's Restaurant & Sundries (St. Petersburg)
- Scully's Tavern (Miami)
- Singleton's Seafood Shack (Atlantic Beach)
- Sonny's Famous Steak Hogies (Hollywood)
- Taco Bus (Tampa)
- Tap Tap Haitian Restaurant (Miami Beach)
- Ted Peters Famous Smoked Fish (South Pasadena)
- Whale's Rib (Deerfield Beach)

Georgia
- Blackwater Grill (St. Simons Island)
- Colonnade (Atlanta)
- 306 Cobb Parkway (Marietta)
- Matthews Cafeteria (Tucker)
- Southern Soul Barbeque (St. Simons Island)
- The Highlander (Atlanta)

- The Silver Skillet (Atlanta)

Idaho
- Bar Gernika (Boise)
- Chef Lou’s Westside Drive-In (Boise)
- Jimmy’s Down the Street (Coeur d’Alene)
- Pizzalchik (Boise)
- Rick’s Press Room Grill & Bar (Meridan)

Illinois
- Big & Littles (Chicago)
- Cemitas Puebla (Chicago)
- Charlie Parker’s (Springfield)
- Chilam Balam (Chicago)
- Chuck’s Southern Comforts Cafe (Burbank)
- DMK Burger Bar (Chicago)
- Dell Rhea’s Chicken Basket (Willowbrook)
- Garifuna Flava (Chicago)
- Glenn’s Diner (Chicago)
- Hackney’s (Glenview)
- Honky Tonk BBQ (Chicago)
- Hopleaf Bar (Chicago)
- Irazu (Chicago)
- Kuma’s Corner (Chicago)
- Nana Organic (Chicago)
- Panozzo’s Italian Market (Chicago)
- Paradise Pup (Des Plaines)
- Smoque (Chicago)
- Taste of Peru (Chicago)
- The Depot American Diner (Chicago)
- The Original Vito & Nick’s Pizzeria (Chicago)
- The Shanty (Wadsworth)
- Tre Kronor (Chicago)
- Tufano’s Vernon Park Tap (Chicago)
- White Palace Grill (Chicago)

Indiana
- 3 Sisters Cafe (Indianapolis)
- Indy’s Historic Steer-In Restaurant (Indianapolis)
- Jersey Cafe (Carmel)
- South Side Soda Shop (Goshen)
- The Barking Dog (Indianapolis)
- The Tamale Place (Indianapolis)
- Triple XXX Restaurant (West Lafayette)

- Zest (Indianapolis)
- Zydeco's (Mooresville)

Iowa
- Dixie Quick's (Council Bluffs)

Kansas
- BBQ Shack (Paola)
- Bobo's Drive In (Topeka)
- Brint's Diner (Wichita)
- Cafe on the Route (Baxter Springs)
- Johnny's Bar-B-Q (Mission)
- RJ's Bob-Be-Que Shack (Mission)
- Woodyard Bar-B-Que (Kansas City)

Kentucky
- J.J.McBrewster's (Lexington)
- Parkette Drive In (Lexington)
- Rick's White Light Diner (Frankfort)
- Smokey Valley Truck Stop (Olive Hill)
- Virgil's Cafe (Bellevue)
- Wallace Station (Versailles)

Louisiana
- Casamento's Restaurant (New Orleans)
- Joey K's Restaurant & Bar (New Orleans)
- Katie's Restaurant (New Orleans)
- Louie & the Redhead Lady (Mandeville)
- Mahony's Po-Boy Shop (New Orleans)
- Parasol's Bar & Restaurant (New Orleans)
- Sammy's Food Service & Deli (New Orleans)
- Surrey's Cafe (New Orleans)
- The Creole Creamery - Uptown (New Orleans)
- The Joint (New Orleans)
- The Old Coffee Pot Restaurant (New Orleans)
- The Rivershack Tavern (Jefferson)

Maine
- A1 Diner (Gardiner)
- Becky's Diner (Portland)
- Bob's Clam Hut (Kittery)
- Maine Diner (Wells)
- Porthole Restaurant (Portland)

Maryland

- Blue Moon Cafe (Baltimore)
- Boulevard Diner (Dundalk)
- Brick Oven Pizza (Baltimore)
- Broadway Diner (Baltimore)
- Chaps Pit Beef (Baltimore)
- Di Pasquale's (Baltimore)
- G&A Restaurant (Baltimore)
- Galway Bay Irish Pub (Annapolis)
- Joe Squared Pizza (Baltimore)
- R&R Taqueria (Elkridge)
- Sip & Bite Restaurant (Baltimore)
- Stoney Creek Inn (Greenland Beach)

Massachusetts

- Charlie's Diner (Spencer)
- Greek Corner Restaurant (Cambridge)
- Italian Express Pizzeria (Boston)
- JT Farnham's Seafood & Grill (South Essex)
- Kelly's Diner (Somerville)
- Mike's City Diner (Boston)
- Morin's Hometown Bar & Grille (Attleboro)
- Mr. Bartley's Gourmet Burgers (Cambridge)
- Rino's Place (East Boston)
- Sam LaGrassa's (Boston)
- The Little Depot Diner (Peabody)

Michigan

- Clarkston Union Bar & Kitchen (Village of Clarkston)
- Joe's Gizzard City (Potterville)
- Krazy Jim's Blimpy Burger (Ann Arbor)
- Polish Village Cafe (Hamtramck)
- Supino Pizzeria (Detroit)
- The Fly Trap (Ferndale)
- Traffic Jam & Snug (Detroit)
- Union Woodshop (Clarkston)

Minnesota

- Al's Breakfast (Minneapolis)
- At Sara's Table Chester Creek Cafe (Duluth)
- Broders' Cucina Italiana (Minneapolis)
- Bryant-Lake Bowl (Minneapolis)
- Casper & Runyon's Nook (St. Paul)
- Colossal Cafe (Minneapolis)

- Donatelli's (White Bear Lake)
- Duluth Grill (Duluth)
- Emily's Lebanese Delicatessen (Minneapolis)
- Gordy's Hi-Hat (Cloquet)
- Kramarczuk's (Minneapolis)
- Marla's Caribbean Cuisine (Minneapolis)
- Modern Cafe (Minneapolis)
- Northern Waters Smokehaus (Duluth)
- Nye's Polonaise Room (Minneapolis)
- Pizzeria Lola (Minneapolis)
- Psycho Suzie's Motor Lounge (Minneapolis)
- Q fanatic BBQ (Champlin)
- Smack Shack at The 1029 Bar (Minneapolis)
- Smalley's Caribbean Barbeque (Stillwater)
- The Blue Door Pub (St. Paul)
- The Nook (St. Paul)
- The Wienery (Minneapolis)
- Victor's 1959 Cafe (Minneapolis)

Mississippi
- Blow Fly Inn (Gulfport)
- Darwell's Cafe (Long Beach)
- The Shed Barbecue & Blues Joint (Ocean Springs)

Missouri
- Grinders (Kansas City)
- Happy Gillis Cafe & Hangout (Kansas City)
- Iron Barley (St. Louis)
- Smokin' Guns BBQ (North Kansas City)
- Swagger Fine Spirits and Food (Kansas City)
- Sweetie Pie's (St. Louis)
- The Brick (Kansas City)
- YJ's Snack Bar (Kansas City)

Nebraska
- Amato's (Omaha)
- Big Mama's Kitchen & Catering (Omaha)
- Brewburger's (Omaha)
- California Tacos (Omaha)
- Joe Tess Place (Omaha)

Nevada
- Bachi Burger (Las Vegas)
- Dish Cafe & Catering (Reno)

- Forte European Tapas Bar & Bistro (Las Vegas)
- Four Kegs Sports Pub (Las Vegas)
- Gold 'N Silver Inn (Reno)
- John Mull's Meats and Road Kill Grill (Las Vegas)
- Lola's - A Louisiana Kitchen (Las Vegas)
- Naked City Pizza (Las Vegas)
- The Coffee Cup (Boulder City)
- UNLV (Las Vegas)

New Hampshire
- Red Arrow Diner (Manchester)

New Jersey
- 10th Avenue Burrito (Belmar)
- Brownstone Diner (Jersey City)
- George's Place (Cape May)
- Hightstown Diner (Hightstown)
- Jefferson Diner (Lake Hopatcong)
- Maui's Dog House (Wildwood)
- Mustache Bill's (Barnegat Light)
- Quahog's Seafood Shack (Stone Harbor)
- Skylark Diner (Edison)
- The Ritz Diner (Livingston)
- Tick Tock Diner (Clifton)
- White Manna Hamburgers (Hackensack)

New Mexico
- Backroad Pizza (Santa Fe)
- Bert's Burger Bowl (Santa Fe)
- Cecilia's Cafe (Albuquerque)
- Harry's Roadhouse (Santa Fe)
- Monte Carlo Steak House (Albuquerque)
- Sophia's Place (Albuquerque)
- Standard Diner (Albuquerque)
- Tecolote Cafe (Santa Fe)
- Tune-Up Cafe (Santa Fe)
- Zia Diner & Angel Food Catering (Santa Fe)

New York
- Ben's Best Deli (Rego Park)
- Blackthorn Restaurant and Pub (Buffalo)
- Defonte's Sandwich Shops (Brooklyn and New York City)
- Empire Brewing Company (Syracuse)
- Eva's European Sweets (Syracuse)

- Eveready Diner (Hyde Park)
- Gazala's Place (New York)
- Grover's Bar & Grill (East Amherst)
- Hildebrandt's (Williston Park)
- John's of 12th Street (New York)
- Lake Effect Diner (Buffalo)
- MOgridder's BBQ (Bronx)
- Mulberry Cafe (Lackawanna)
- Pies 'N' Thighs (Brooklyn)
- Rincon Criollo (Corona-Queens)
- Sage General Store (Long Island City)
- Sidecar (Brooklyn)
- Sophia Restaurant (Buffalo)
- The Pitstop (Merrick)
- The Redhead (New York)
- The Sparrow Tavern (Astoria)
- Tortilleria Nixtamal (Corona)

North Carolina
- Bar-B-Q King (Charlotte)
- Dish (Charlotte)
- Jake's Good Eats (Charlotte)
- Landmark Restaurant Diner (Charlotte)
- South 21 Drive-In (Charlotte)
- The Black Pelican Oceanfront Restaurant (Kitty Hawk)
- The Penguin (Charlotte)

Ohio
- Blue Ash Chili Restaurant (Cincinnati)
- Geraci's Restaurant (Cleveland)
- Lucky's Cafe (Cleveland)
- Melt Bar & Grilled (Lakewood)
- Momocho (Cleveland)
- Parkview Niteclub (Cleveland)
- Sterle's Slovenian Country House (Cleveland)
- Terry's Turf Club (Cincinnati)

Oklahoma
- Cattlemen's Steakhouse (Oklahoma City)
- Clanton's Cafe (Vinita)
- Eischen's Bar & Grill (Okarche)
- Ingrid's Kitchen (Oklahoma City)
- Leo's BBQ (Oklahoma City)
- Nic's Grill (Oklahoma City)

- The Diner (Norman)
- The Rock Cafe (Stroud)

Oregon
- Arleta Library Bakery & Cafe (Portland)
- Blueplate Lunch Counter & Soda Fountain (Portland)
- Bunk Sandwiches (Portland)
- Byways Cafe (Portland)
- Otto's Sausage Kitchen & Meat Market (Portland)
- Pine State Biscuits (Portland)
- Podnah's Pit Barbecue (Portland)
- Pok Pok (Portland)

Pennsylvania
- Big Jim's (Pittsburgh)
- Crystal Restaurant (Pittsburgh)
- Daddypops (Hatboro)
- Dor-Stop Restaurant (Pittsburgh)
- Good Dog Bar & Restaurant (Philadelphia)
- Honey's Sit-N-Eat (Philadelphia)
- Kelly O's Diner (Pittsburgh)
- Lo Bello's (Coraopolis)
- Memphis Taproom (Philadelphia)
- Nadine's Restaurant (Pittsburgh)
- Pineville Tavern (Pineville)
- Silk City Diner (Philadelphia)
- Starlite Lounge (Blawnox)
- The Dining Car & Market (Philadelphia)

Rhode Island
- Crazy Burger Cafe & Juice Bar (Narragansett)
- Evelyn's Drive-In (Tiverton)
- Louie's Restaurant (Providence)
- The Liberty Elm Diner (Providence)

South Carolina
- Fuel Cantina (Charleston)
- Harold's (Gaffney)
- Pawleys Front Porch (Columbia)
- Perfectly Franks (Summerville)
- Tattooed Moose (Charleston)
- The Beacon Drive-In (Spartanburg)
- The Early Bird Diner (Charleston)
- The Farmer's Shed (Lexington)

- The Glass Onion (Charleston)

Tennessee

- Alcenia's (Memphis)
- Arnold's Country Kitchen (Nashville)
- Athens Family Restaurant (Nashville)
- Bro's Cajun Cuisine (Nashville)
- Cafe Rakka (Hendersonville)
- Cozy Corner (Memphis)
- Jamaicaway (Nashville)
- Leonard's BBQ (Memphis)
- Little Tea Shop (Memphis)
- Marlowe's Ribs (Memphis)
- Martin's Bar-B-Que Joint (Nolensville)
- Pizza Palace (Knoxville)
- Savarino's Cucina (Nashville)
- Tom's Bar-B-Q (Memphis)
- Uncle Lou's (Memphis)

Texas

- Afrah (Richardson)
- Avila's (Dallas)
- Beto's Comida Latina (San Antonio)
- Bob's Taco Station (Rosenberg)
- Bun 'N' Barrel (San Antonio)
- Cafe Pita (Houston)
- Cane Rosso (Dallas)
- Casino El Camino (Austin)
- Chef Point Cafe (Watauga)
- Chop House Burgers (Arlington)
- Counter Cafe (Austin)
- Dough Pizzeria Napoletana (San Antonio)
- El Bohio (San Antonio)
- Foreign & Domestic (Austin)
- Fred's Texas Cafe (Fort Worth)
- Green Mesquite (Austin)
- Hullabaloo Diner (Wellborn)
- Jamaica Gates Caribbean Cuisine (Arlington)
- Kenny & Ziggy's (Houston)
- Lankford Grocery (Houston)
- Louie Mueller BBQ (Taylor)
- Luke's Inside Out (Austin)
- Mac & Ernie's (Tarpley)
- Magnolia Cafe (Austin)

- Magnolia Pancake Haus (San Antonio)
- Maple & Motor (Dallas)
- Maria's Taco Express (Austin)
- Louie's (Dallas)
- Moroccan Bites (San Antonio)
- Niko Niko's (Houston)
- Noble Pig Sandwiches (Austin)
- Monument Cafe (Georgetown)
- Pecan Lodge (Dallas)
- Pepe's and Mito's (Dallas)
- Prince Lebanese Grill (Arlington)
- Red Lion Pub & Restaurant (Houston)
- T-Bone Tom's Steakhouse (Kemah)
- Taco Taco Cafe (San Antonio)
- Texas Pride BBQ (Adkins)
- The Cove (San Antonio)
- Tip Top Cafe (San Antonio)
- Twisted Root Burger Co. (Dallas)

Utah
- Blue Plate Diner (Salt Lake City)
- Burger Bar (Roy)
- Lone Star Taqueria (Salt Lake City)
- Moochie's Meatballs & More (Salt Lake City)
- Pat's BBQ (Salt Lake City)
- Red Iguana (Salt Lake City)
- Ruth's Diner (Salt Lake City)

Virginia
- Beach Pub (Virginia Beach)
- Captain Chuck-a-Mucks (Rescue)
- Citrus Breakfast & Lunch (Virginia Beach)
- Dots Back Inn (Richmond)
- Doumar's (Norfolk)
- Flip Flops Grill & Chill (Virginia Beach)
- Get Fresh Cafe (Norfolk)
- Harvey's Hot Dogs II (Portsmouth)
- La Caraquena (Falls Church)
- Leaping Lizards Cafe (Virginia Beach)
- Metro 29 Diner (Arlington)
- Moseberth's Fried Chicken (Portsmouth)
- Rigoletto Italian Bakery & Cafe (Virginia Beach)
- The Village Cafe (Richmond)
- Virginia Diner (Wakefield)

- Whitner's BBQ (Virginia Beach)

Washington
- Bizzarro Italian Cafe (Seattle)
- Bobby's Hawaiian Style Restaurant (Everett)
- Chaps Coffee Co (Spokane)
- Crockett's Public House (Puyallup)
- Elk Public House (Spokane)
- Fish Tale Brew Pub (Olympia)
- Georgia's Greek Restaurant & Deli (Seattle)
- Hills' Restaurant and Lounge (Spokane)
- Mike's Chili Parlor (Seattle)
- Pam's Kitchen (Seattle)
- Picabu Neighborhood Bistro (Spokane)
- Slim's Last Chance Chili Shack & Watering Hole (Seattle)
- Southern Kitchen Restaurant (Tacoma)
- The Madison Diner (Bainbridge Island)
- Voula's Offshore Cafe (Seattle)
- Waddell's Pub and Grille (Spokane)

West Virginia
- Central City Cafe (Huntington)
- Hillbilly Hot Dogs (Lesage)

Wisconsin
- Anchor Bar (Superior)
- Cempazuchi (Milwaukee)
- Comet Cafe (Milwaukee)
- Franks Diner (Kenosha)

109

SELECTIONS: FOOD & WINE

109.1 Overview

Food & Wine magazine regularly compiles various lists of top food and beverages as well as restaurants and bars throughout the U.S. The following are the most recent lists:

109.2 America's Best

Best Bars

- Anvil Bar & Refuge (Houston, TX)
- Arnaud's French 75 Bar (New Orleans, LA)
- Bar Agricole (San Francisco, CA)
- Beretta (San Francisco, CA)
- Bradstreet Crafthouse (Minneapolis, MN)
- Clover Club (New York, NY)
- Clyde Common (Portland, OR)
- Comstock Saloon (San Francisco, CA)
- Copa d'Oro (Santa Monica, CA)
- Craft & Commerce (San Diego, CA)
- Cure (New Orleans, LA)
- Death & Co. (New York, NY)
- Distil (Milwaukee, WI)
- Downtown Cocktail Room (Las Vegas, NV)
- Drink (Boston, MA)
- Dutch Kills (New York, NY)
- Eleven Madison Park (New York, NY)
- Employees Only (New York, NY)
- Holeman & Finch Public House (Atlanta, GA)
- Island Creek Oyster Bar (Boston, MA)
- Jimmy's (Aspen, CO)
- Leon's Full Service (Decatur, GA)
- Little Branch (New York, NY)
- Living Room Bar (Miami Beach, FL)
- Mayahuel (New York, NY)
- Oak at Fourteenth (Boulder, CO)

- Parasol Down (Las Vegas, NV)
- Pegu Club (New York, NY)
- PDT (New York, NY)
- PX (Alexandria, VA)
- Rivera (Los Angeles, CA)
- Rob Roy (Seattle, WA)
- Roger Room (West Hollywood, CA)
- Sable Kitchen & Bar (Chicago, IL)
- Smuggler's Cove (San Francisco, CA)
- Southwark (Philadelphia, PA)
- Taste (St. Louis, MO)
- Tavern Law (Seattle, WA)
- Teardrop Cocktail Lounge (Portland, OR)
- The Alembic (San Francisco, CA)
- The Drawing Room (Chicago, IL)
- The Florida Room (Miami Beach, FL)
- The Franklin Mortgage & Investment Co. (Philadelphia, PA)
- The Passenger (Washington, DC)
- The Patterson House (Nashville, TN)
- The Slanted Door (San Francisco, CA)
- The Sound Table (Atlanta, GA)
- The Tasting Kitchen (Venice, CA)
- The Varnish (Los Angeles, CA)
- The Violet Hour (Chicago, IL)

Best Beer Bars

- Beer Revolution (Oakland, CA)
- Blind Tiger Ale House (New York, NY)
- Breukelen Bier Merchants (Brooklyn, NY)
- Bukowski Tavern (Boston, MA)
- Draught House (Austin, TX)
- Father's Office (Los Angeles, CA)
- Great Lost Bear (Portland, ME)
- Hopleaf (Chicago, IL)
- Monk's Kettle (San Francisco)
- Spuyten Duyvil (Brooklyn, NY)
- Standard Tap (Philadelphia, PA)
- The Bulldog (New Orleans, LA)
- The Mitten Bar (Ludington, MI)
- Über Tavern (Seattle, WA)
- Verdugo (Los Angeles, CA)

Best Beer Gardens

- Biergarten (San Francisco, CA)
- Birreria (New York, NY)
- Bohemiam Hall and Beer Garden (Queens, NY)
- Der Biergarten (Atlanta, GA)
- Drury Beer Garden (Philadelphia, PA)
- Easy Tiger (Austin, TX)
- Lowry Beer Garden (Denver, CO)
- Prost! (Portland, OR)
- Sheffield's (Chicago, IL)
- Stone Brewing World Bistro & Gardens (San Diego, CA)
- Sweet Cheeks Q (Boston, MA)
- The Red Lion Tavern (Los Angeles, CA)
- Village Pub & Beer Garden (Nashville, TN)
- Zeitgeist (San Francisco, CA)

Best Burgers/Bacon Burgers

- B Spot Burgers (Ohio, multiple locations)
- BLT Burger (Las Vegas, NV)
- Bobby's Burger Palace (various locations throughout Northeast U.S.)
- Chicago Cut Steakhouse (Chicago, IL)
- Craigie on Main (Boston, MA)
- David Burke Primehouse (Chicago, IL)
- Dyer's Burgers (Memphis, TN)
- Farm Burger (Decatur, GA)
- Father's Office (Los Angeles, CA)
- Gott's Roadside (Napa, CA)
- Green Street Grill (Boston, MA)
- Healdsburg Bar & Grill (Healdsburg, CA)
- Holeman & Finch (Atlanta, GA)
- In-N-Out Burger (California, multiple locations)
- Little Owl (New York, NY)
- Louis's Lunch (New Haven, CT)
- Lüke (New Orleans, LA)
- Michael's Genuine Food & Drink (Miami, FL)
- Miller's Bar (Dearborn, MI)
- Minetta Tavern (New York, NY)
- Palena Café (Washington, DC)
- Perini Ranch Steakhouse (Buffalo Gap, TX)
- Peter Luger (New York, NY)
- Shake Shack (New York, NY and Philadelphia, PA)
- Slows Bar BQ (Detroit, MI)
- Smoke (Dallas, TX)
- Ted's (Meriden, CT)

- The Spotted Pig (New York, NY)
- Umamicatessen (Los Angeles, CA)
- Wayfare Tavern (San Francisco, CA)
- White Manna (Hackensack, NJ)
- Zuni Café (San Francisco, CA)

Best Chicken Wings
- 17th Street BBQ (Murphysboro, IL and Las Vegas, NV)
- Alla Spina (Philadelphia, PA)
- Anchor Bar (Buffalo, NY)
- Belly Shack (Chicago, IL)
- Big Bob Gibson Bar-B-Q (AL and NC)
- BonChon (various U.S. locations)
- Clio (Boston, MA)
- Hopscotch (Oakland, CA)
- Lodge Restaurant at Carmel Valley Ranch (Carmel, CA)
- Lukshon by Sang Yoon (Culver City, CA)
- Mission Chinese Food (San Francisco, CA and New York, NY)
- NOLA Restaurant (New Orleans, LA)
- Pok Pok (Portland, OR and New York, NY)
- Prato (Winter Park, FL)
- San Tung (San Francisco, CA)
- Roast (Detroit, MI)
- Talde (Brooklyn, NY)
- The Bazaar by José Andrés (Los Angeles, CA)
- The Kettle Black (Brooklyn, NY)
- The Parish (Los Angeles, CA)
- The Source (Washington, DC)
- WingStop (Texas-based chain)
- Yusho (Chicago, IL)

Best Doughnuts
- Betty Ann Food Shop (Boston, MA)
- Britt's Donuts (Carolina Beach, NC)
- Café du Monde (New Orleans, LA)
- Clear Flour Bread Bakery (Brookline, MA)
- Congdon's Doughnuts (Wells, ME)
- Doughnut Plant (New York, NY)
- Dynamo Donuts (San Francisco, CA)
- Gourdough's (Austin, TX)
- Peter Pan Donut & Pastry Shop (Brooklyn, NY)
- Primo's Donuts (Los Angeles, CA)

- Sublime Doughnuts (Atlanta, GA)
- The Doughnut Shop (St. Louis, MO)
- The Doughnut Vault (Chicago, IL)
- Top Pot Doughnuts (Seattle, WA)
- Voodoo Doughnut (Portland, OR)

Best Fried Chicken
- Ad Hoc (Napa Valley, CA)
- Barbecue Inn (Houston, TX)
- Birch & Barley (Washington, DC)
- Blue Ribbon Sushi Bar & Grill (Las Vegas, NV)
- Bubba's Cooks Country (Dallas, TX)
- Central Michel Richard (Washington, DC)
- Crisp (Chicago, IL)
- Greenwood's (Roswell, GA)
- Harold's Chicken Shack (Chicago, IL)
- Hattie's (Saratoga Springs, NY)
- Husk (Charleston, SC)
- Jestine's (Charleston, SC)
- Jus Cookin's (Lakewood, CO)
- Mama Dip's Kitchen (Chapel Hill, NC)
- Mary Mac's Tea Room (Atlanta, GA)
- Momofuku Noodle Bar (New York, NY)
- Perry St. (New York, NY)
- Pies-N-Thighs (Brooklyn, NY)
- Pine State Biscuits (Portland, OR)
- Prince's Hot Chicken Shack (Nashville, TN)
- Roscoe's House of Chicken and Waffles (Los Angeles, CA)
- Simpatica (Portland, OR)
- Son of a Gun (Los Angeles, CA)
- Supper (Philadelphia, PA)
- The Highball (Austin, TX)
- Two Sisters Kitchen (Jackson, MS)
- Willie Mae's Scotch House (New Orleans, LA)

Best Grilled Cheese
- 24 Diner (Austin, TX)
- Artisanal Fromagerie, Bistro and Wine Bar (New York, NY)
- Beecher's Handmade Cheese (Seattle, WA and New York, NY)
- Blue Dog Bakery & Café (Louisville, KY)
- Big Sur Bakery (Big Sur, CA)
- Bouchon Bakery (New York, NY)
- Café Mezza (Houston, TX)
- Clementine (Los Angeles, CA)

- EastBurn (Portland, OR)
- Five Guys Burgers and Fries (multiple U.S. locations)
- Grahamwich (Chicago, IL)
- Grilled Cheese & Co. (Catonsville, MD)
- Jaleo (Washington, DC)
- Lola (Cleveland, OH)
- Milk Truck (New York, NY)
- Roxy's Grilled Cheese (Boston, MA)
- South Philadelphia Tap Room (Philadelphia, PA)
- Tartine Bakery (San Francisco, CA)
- The American Grilled Cheese Kitchen (San Francisco, CA)
- The Grilled Cheese Truck (Los Angeles, CA)
- The Queens Kickshaw (Queens, NY)

Best Ice Cream Shops
- Amy's Ice Cream (Austin, TX)
- Annabelle's Natural Ice Cream (Portsmouth, NY)
- Big Dipper Ice Cream (Missoula, MT)
- Bi-Rite Creamery (San Francisco, CA)
- Blue Marble (Brooklyn, NY)
- Bubbie's Ice Cream (Honolulu, HI)
- Cool Moon Ice Cream (Portland, OR)
- Crescent Ridge Dairy Bar (Sharon, MA)
- Four Seas Ice Cream (Centerville MA)
- Glacé Artisan Ice Cream (Kansas City, MO)
- Graeter's (Ohio, various locations)
- Ici Ice Cream (Berkley, CA)
- Jeni's Splendid Ice Creams (Columbus, OH)
- Maple View Farm and Dairy (Hillsborough, NC)
- Molly Moon Ice Cream (Seattle, WA)
- Moomers Homemade Ice Cream (Traverse City, MI)
- Mora Iced Creamery (Bainbridge Island, WA)
- Mt. Desert Ice Cream (Bar Harbor, ME)
- Pumphouse Creamery (Minneapolis, MN)
- Sweet Action Ice Cream (Denver, CO)
- Sweet Republic (Scottsdale, AZ)
- The Creole Creamery (New Orleans, LA)
- Three Twins Organic Ice Cream (San Rafael, CA)
- Toscanini's (Cambridge, MA)
- Woodside Farm Creamery (Hockessin, DE)

Best Juice Bars
- Beverly Hills Juice (Los Angeles, CA)
- BluePrintJuice (New York, NY)

- Drought (Detroit, MI)
- Dtox Juice (Atlanta, GA)
- Evolution Fresh (Bellevue, WA)
- Juice Land (Austin,TX)
- Juice Press (New York, NY)
- Juice to You (San Francisco, CA)
- jugofresh (Miami, FL)
- Kreation Juicery (Santa Monica, CA)
- Liquiteria (New York, NY)
- Melvin's Juice Box (New York, NY)
- Moon Juice (Venice, CA)
- Organic Avenue (New York, NY)
- Paleta (Los Angeles, CA and Detroit, MI)
- Peeled (Chicago, IL)
- Pressed Juicery (various locations, CA)
- Sip (Portland, OR)
- sweetpress (Washington, DC)
- The Gem (Dallas, TX)

Best Places For Pie
- Achatz Handmade Pie Co. (Ann Arbor, MI)
- First Prize Pies (Brooklyn, NY)
- Hill Country Chicken (New York, NY)
- HoneyPie (Milwaukee, WI)
- Hoosier Mama Pie Company (Chicago, IL)
- Mission Pie (San Francisco, CA)
- PieLab (Greensboro, AL)
- Random Order (Portland, OR)
- Scratch (Durham, NC)
- Simplethings Sandwich & Pie Shop (Los Angeles, CA)
- Sweetie Pies (Napa Valley, CA)
- Three Babes Bakeshop (San Francisco, CA)

Best Pizza Places
- 2Amys Neapolitan Pizzeria (Washington, DC)
- 800 Degrees (Los Angeles, CA)
- Al Forno (Providence, RI)
- Apizza Scholls (Portland, OR)
- Bar Toma (Chicago, IL)
- Buddy's Pizza (Detroit, MI)
- Burt's Place (Chicago, IL)
- Casey's Pizza Truck (San Francisco, CA)
- Co. (New York, NY)

- Del Popolo (San Francisco, CA)
- Di Fara (Brooklyn, NY)
- Don Antonio by Starita (New York, NY)
- Flour + Water (San Francisco, CA)
- Forcella (New York, NY)
- Frank Pepe Pizzeria Napoletana (New Haven, CT)
- Franny's (Brooklyn, NY)
- Garage Bar (Louisville, KY)
- Great Lake (Chicago, IL)
- Harry's Pizzeria (Miami, FL)
- Ken's Artisan Pizza (Portland, OR)
- Keste Pizza and Vino (New York, NY)
- Lucali (Brooklyn, NY)
- Mani Osteria (Ann Arbor, MI)
- Motorini (New York, NY)
- Nicoletta (New York, NY)
- Osteria (Philadelphia, PA)
- Oven and Shaker (Portland, OR)
- Pastaria (St. Louis, MO)
- Paulie Gee's (Brooklyn, NY)
- Pizzaiolo (Oakland, CA)
- Pizzeria Bianco (Phoenix, AZ)
- Pizzeria Delfina (San Francisco, CA)
- Pizzeria Lola (Minneapolis, MN)
- Pizzeria Mozza (Los Angeles, CA)
- Pizzeria Picco (Larkspur, CA)
- Punch Pizza (Saint Paul, MN)
- Redd Wood (Yountville, CA)
- Ribalta (New York, NY)
- Rubirosa (New York, NY)
- Santarpio's Pizza (Boston, MA)
- Sottocasa (New York, NY)
- Stella Rossa (Santa Monica, CA)
- Supino Pizzeria (Detroit, MI)
- Tacconelli's Pizzeria (Philadelphia, PA)
- Tarry Lodge (Port Chester, NY)
- Totonno's (Brooklyn, NY)
- The Backspace (Austin, TX)
- Via Tribunali (New York, NY)

Best Sandwich Shops
- Bäco Mercat (Los Angeles, CA)
- Be'wiched (Minneapolis, MN)
- Bunk (Portland, OR)

- Butcher & Bee (Charleston, SC)
- Cochon Butcher (New Orleans, LA)
- Cutty's (Brookline, MA)
- Fozzie's Sandwich Emporium (St. Louis, MO)
- Fundamental (Los Angeles, CA)
- Ink.Sack (Los Angeles, CA)
- Neal's Deli (Carrboro, NC)
- No. 7 Sub (New York, NY)
- Pane Bianco (Phoenix, AZ)
- Parm (New York, NY)
- Revival Market (Houston, TX)
- Star Provisions (Atlanta, GA)
- Wise Sons (San Francisco, CA)
- Xoco (Chicago, IL)
- Zingerman's Roadhouse (Ann Arbor, MI)

Best Southern Food

- 5 & 10 (Athens, GA)
- Bar-B-Que Shop (Memphis, TN)
- Big Apple Inn (Jackson, MS)
- Burbage's Grocery (Charleston, SC)
- Charlie Teeple's Seafood (Thunderbolt, GA)
- Charlie Vergo's Rendezvous (Memphis, TN)
- Clary's Café (Savannah, GA)
- Cochon (New Orleans, LA)
- Cochon Butcher (New Orleans, LA)
- Cypress (Charleston, SC)
- Elizabeth on 37th (Savannah, GA)
- FIG (Charleston, SC)
- Herbsaint (New Orleans, LA)
- Holeman & Finch Public House (Atlanta, GA)
- Hot and Hot Fish Club (Birmingham, AL)
- Husk (Charleston, SC)
- Interstate Bar-B-Que (Memphis, TN)
- Mahony's Po-Boy Shop (New Orleans, LA)
- Marandy's Soul Food Restaurant (Savannah, GA)
- Martha Lou's Kitchen (Charleston, SC)
- McCrady's (Charleston, SC)
- Payne's Bar-B-Que (Memphis, TN)
- Restaurant August (New Orleans, LA)
- Restaurant Eugene (Atlanta, GA)
- Scott's Bar-B-Que (Hemingway, SC)
- The Barn at Blackberry Farm (Walland, TN)
- The Catbird Seat (Nashville, TN)

- Willie Mae’s Scotch House (New Orleans, LA)
- Yardbird Southern Table & Kitchen (Miami, FL)

110

SELECTIONS: GAYOT

110.1 Overview

Since 1969, Gayot (pronounced guy-OH; www.gayot.com) has been a resource for news and professional reviews on dining, travel, and lifestyle.

Annually, Gayot publishes a list of the Top 40 restaurants in the U.S. and Top 10 lists for several restaurant segments. This chapter presents the 2012 selections.

110.2 Top 40 List 2012

- Addison (San Diego, CA)
- Alinea (Chicago, IL)
- Chef Mavro (Honolulu, HI)
- Coi (San Francisco, CA)
- Cyrus (Healdsburg, CA)
- Daniel (New York, NY)
- Eleven Madison Park (New York, NY)
- Everest (Chicago, IL)
- Frasca Food & Wine (Boulder, CO)
- Gary Danko (San Francisco, CA)
- Jean Georges (New York, NY)
- Joël Robuchon (Las Vegas, NV)
- L'Espalier (Boston, MA)
- Le Bernardin (New York, NY)
- Le Cirque (New York, NY)
- Manresa (Los Gatos, CA)
- Masa (New York, NY)
- Masa's (San Francisco, CA)
- Mélisse (Los Angeles, CA)
- Menton (Boston, MA)
- Michel Richard Citronelle (Washington, DC)
- Patina (Los Angeles, CA)
- per Se (New York, NY)
- Picasso (Las Vegas, NV)
- Providence (Los Angeles, CA)
- Restaurant August (New Orleans, LA)

- Restaurant Eugene (Atlanta, GA)
- Restaurant Guy Savoy (Las Vegas, NV)
- Restaurant Nicholas (Red Bank, NJ)
- Spago Beverly Hills (Los Angeles, CA)
- Studio (Laguna Beach, CA)
- The French Laundry (Yountville, CA)
- The Herbfarm (Woodinville, WA)
- The Inn at Little Washington (Washington, VA)
- The Modern (New York, NY)
- TRU (Chicago, IL)
- Twist by Pierre Gagnaire (Las Vegas, NV)
- Urasawa (Los Angeles, CA)
- Vetri (Philadelphia, PA)
- Vie (Western Springs, IL)

110.3 Top 10 By Segment

Best Barbecue Restaurants
- City Market (Luling, TX)
- Daisy May's BBQ USA (New York, NY)
- Everett & Jones Barbeque (Oakland, CA)
- Fiorella's Jack Stack Barbecue (Kansas City, MO)
- Fox Bros. Bar-B-Q (Atlanta, GA)
- Full Moon Bar-B-Que (Hoover, AL)
- Montgomery Inn at the Boathouse (Cincinnati, OH)
- Smoque BBQ (Chicago, IL)
- Urban Bar-B-Cue Company (Rockville, MD)
- Zeke's Smokehouse (Montrose, CA)

Best Burger Restaurants
- 25 Degrees (Hollywood, CA)
- Billy Goat Tavern & Grill (Chicago, IL)
- Bobcat Bite (Santa Fe, NM)
- Burger Bar at Mandalay Bay Resort & Casino (Las Vegas, NV)
- Burger Joint at Le Parker Meridien (New York, NY)
- BurgerMeister (San Francisco, CA)
- Carl's Drive In (Brentwood, MO)
- Chip's Old Fashioned Hamburgers (Dallas, TX)
- FLIP burger boutique (Atlanta, GA)
- Le Tub (Hollywood, FL)

Best Cheap Eats
- All Star Sandwich Bar (Cambridge, MA)
- The Bee's Knees Tapas Restaurant & Lounge (Augusta, GA)
- Big Star (Chicago, IL)
- Burger Tap & Shake (Washington, DC)
- Hash House A Go Go (Las Vegas, NV and San Diego, CA)
- Ken's Artisan Pizza (Portland, OR)
- Mission Chinese Food (San Francisco, CA)
- Pok Pok NY (Brooklyn, NY)
- Punk's (Baltimore, MD)
- Slater's 50/50 (Anaheim Hills, CA)

Best Craft Cocktail Bars
- The Aviary (Chicago, IL)
- Bar Pleiades at The Surry (New York, NY)
- Clock Bar at the The Westin St. Francis (San Francisco, CA)
- Columbia Room (Washington, DC)
- Cure (New Orleans, LA)
- Delmonico Steakhouse at The Venetian (Las Vegas, NV)
- Drinkshop at the W Atlanta Downtown (Atlanta, GA)
- Ray's & Stark Bar at the Los Angeles County Museum of Art (Los Angeles, CA)
- The Franklin Mortgage & Investment Co. (Philadelphia, PA)
- Zig Zag Cafe (Seattle, WA)

Best Heart-Healthy Restaurants
- Canyon Ranch Grill at The Palazzo Resort Hotel Casino (Las Vegas, NV)
- Community Food & Juice (New York, NY)
- Greenleaf Gourmet Chopshop (Beverly Hills, CA)
- Greens at Fort Mason (San Francisco, CA)
- Green Zebra (Chicago, IL)
- Makoto (Bal Harbour, FL)
- Natural Selection (Portland, OR)
- Spa Cafe at Bacara Resort & Spa (Goleta, CA)
- Vedge (Philadelphia, PA)

Best Holiday Dining Restaurants
- 701 Restaurant (Washington, DC)
- Clio at the Eliot Hotel (Boston, MA)
- Fearing's at The Ritz-Carlton (Dallas, TX)
- Fountain Restaurant at the Four Seasons Hotel (Philadelphia, PA)
- Georgian Room at The Cloister (Sea Island, GA)

- Jean Georges at Trump International Hotel & Tower (New York, NY)
- Madera at Rosewood Sand Hill (Menlo Park, CA)
- Melissa (Santa Monica, CA)
- NoMI Kitchen at the Park Hyatt (Chicago, IL)
- Picasso at Bellagio (Las Vegas, NV)

Best Hotel Restaurants

- Addison at The Grand Del Mar (San Diego, CA)
- Michael Mina at Bellagio (Las Vegas, NV)
- Auberge du Soleil (Rutherford, CA)
- CityZen at Mandarin Oriental (Washington DC)
- Georgian Room at The Cloister (Sea Island, GA)
- Jean Georges at Trump International Hotel & Tower (New York, NY)
- Joël Robouchon at MGM Grand Hotel & Casino (Las Vegas, NV)
- Masa's at the Executive Hotel Vintage Court (San Francisco, CA)
- Michel Richard Citronelle at the Latham Hotel (Washington, DC)
- Restaurant Guy Savoy at Caesars Palace (Las Vegas, NV)

Best Ice Cream Shops

- Bassetts Ice Cream (Philadelphia, PA)
- Black Dog Gelato (Chicago, IL)
- Fairfax Scoop (Fairfax, CA)
- Four Seas Ice Cream (Centerville, MA)
- Graeter's (Cincinnati, OH)
- Il Laboratorio del Gelato (New York, NY)
- Mora Iced Creamery (Bainbridge Island, WA)
- Morelli's Gourmet Ice Cream & Desserts (Atlanta, GA)
- Scoops (Los Angeles, CA)
- Wild About Harry's (Dallas, TX)

Best Irish Pubs

- Doyle's Cafe (Boston, MA)
- Galway Hooker (New York, NY)
- The Harp (Cleveland, OH)
- The Irish Bank Bar & Restaurant (San Francisco, CA)
- The Irish Oak (Chicago, IL)
- Kelly's Irish Times (Washington, DC)
- McGillin's Olde Ale House (Philadelphia, PA)
- McGuire's Irish Pub (Pensacola, FL)
- O'Brien's Irish Pub & Restaurant (Santa Monica, CA)
- Rosie McCaffrey's Irish Pub & Restaurant (Phoenix, AZ)

Best Molecular Gastronomy Restaurants
- Alinea (Chicago, IL)
- AnQi Gourmet Bistro by Crustacean (Costa Mesa, CA)
- Atelier Crenn (San Francisco, CA)
- Baume (Palo Alto, CA)
- Hugo’s (Portland, ME)
- Moto (Chicago, IL)
- Nine-Ten at the Grande Colonial Hotel (La Jolla, CA)
- The Bazaar by Jose Andres (Los Angeles, CA)
- The French Laundry (Yountville, CA)
- wd-50 (New York, NY)

Best New Restaurants
- Bacio (Las Vegas, NV)
- Boulud Sud (New York, NY)
- Broadway by Amar Santana (Orange County, CA)
- ChoLon Modern Asian Bistro (Denver, CO)
- El Centro D.F. (Washington, DC)
- Graffiato by Mike Isabella (Washington, DC)
- Husk (Charleston, SC)
- Maison Giraud (Los Angeles, CA)
- Next Restaurant (Chicago, IL)
- No. 246 Restaurant (Atlanta, GA)
- Origen (San Francisco, CA)
- Philippe Restaurant + Lounge (Houston, TX)
- Ray’s & Stark Bar (Los Angeles, CA)
- Scarpetta (Las Vegas, NV)
- The Commissary (Dallas, TX)
- The Dutch (New York, NY)

Best Outdoor Dining Restaurants
- 230 Fifth (New York, NY)
- Comme Ca at The Cosmopolitan (Las Vegas, NV)
- The Beachcomber at Crystal Cove (Newport Coast, CA)
- Area 31 at the Epic Hotel (Miami, FL)
- John Ash & Co. (Santa Rosa, CA)
- La Mar Cebicheria Peruana (San Francisco, CA)
- Rittenhouse Tavern (Philadelphia, PA)
- Piccolo Sogno (Chicago, IL)
- The Polo Lounge at The Beverly Hills Hotel (Beverly Hills, CA)
- Ray’s on the River (Atlanta, GA)

Best Penthouse Restaurants
- Bertrand at Mister A's (San Diego, CA)
- Coach Insignia (Detroit, MI)
- Eiffel Tower at Paris Las Vegas (Las Vegas, NV)
- Everest at the Chicago Stock Exchange (Chicago, IL)
- L.A. Prime at The Westin Bonaventure Hotel & Suites (Los Angeles, CA)
- Nikolai's Roof at Hilton Atlanta (Atlanta, GA)
- Penthouse 808 at Ravel (Long Island City, NY)
- The Loft at Montage Laguna Beach (Laguna Beach, CA)
- Top of the Hub at Prudential Center (Boston, MA)
- XIX Nineteen Restaurant at Park Hyatt Philadelphia at the Bellevue (Philadelphia, PA)

Best Pizza Restaurants
- 2Amys (Washington, DC)
- Antico Pizza Napoletana (Atlanta, GA)
- Dolce Vita Pizzeria & Enoteca (Houston, TX)
- Great Lake Pizza (Chicago, IL)
- Keste Pizza & Vino (New York, NY)
- Pizzeria Bianco (Phoenix, AZ)
- Regina Pizzeria (Boston, MA)
- Serious Pie (Seattle, WA)
- Stella Rossa Pizza Bar (Santa Monica, CA)
- Tony's Pizza Napoletana (San Francisco, CA)

Best Seafood Restaurants
- AQUA by El Gaucho (Seattle, WA)
- Bartolotta Ristorante di Mare at Wynn Las Vegas (Las Vegas, NV)
- Chef Mavro (Honolulu, HI)
- L2O at The Belden-Stratford (Chicago, IL)
- Le Bernardin (New York, NY)
- Maritana Grille at The Don CeSar (St. Pete Beach, FL)
- Providence (Los Angeles, CA)
- REEF (Houston, TX)
- Splash Restaurant & Bar (Westport, CT)
- Waterbar (San Francisco, CA)

Best Sports Bars
- Jake's Dilemma (New York, NY)
- Bobby Valentine's Sports Gallery Cafe (Stamford, CT)
- The Burger & Beer Joint (Miami Beach, FL)

- STATS (Atlanta, GA)
- ESPN Zone (Los Angeles, CA)
- Lagasse's Stadium at The Palazzo Resort Hotel Casino (Las Vegas, NV)
- Nemo's Bar & Grill (Detroit, MI)
- Ricky's Sports Theatre & Grill (San Leandro, CA)
- The Sportsgrille at Hilton Nashville Downtown (Nashville, TN)
- Stadium View (Green Bay, WI)

Best Steakhouses
- Bern's Steak House (Tampa, FL)
- Bob's Steak & Chop House (Dallas, TX)
- Bobo's (San Francisco, CA)
- Carnevino at The Palazzo Resort Hotel Casino (Las Vegas, NV)
- Chicago Cut Steakhouse (Chicago, IL)
- CUT (Beverly Hills, CA)
- Elway's Cherry Creek (Denver, CO)
- Emeril's Delmonico (New Orleans, LA)
- Peter Luger (Brooklyn, NY)
- The Precinct (Cincinnati, OH)

Best Wine Bars
- Bar Boulud (New York, NY)
- Bin 26 Enoteca (Boston, MA)
- BottleRock (Culver City, CA)
- D.O.C.G. at The Cosmopolitan (Las Vegas, NV)
- d'Vine Wine Bar & Shop (Atlanta, GA)
- OC Wine Mart & Tasting Bar (Irvine, CA)
- Patrick's Bar Vin at Hotel Mazarin (New Orleans, LA)
- Pops for Champagne (Chicago, IL)
- Press Club (San Francisco, CA)
- Veritas Wine Room (Dallas, TX)

Most Romantic Restaurants
- Andrea (Newport Coast, CA)
- Auberge du Soleil (Rutherford, CA)
- Babette's Cafe (Atlanta, GA)
- Canlis (Seattle, WA)
- Congress (Austin, TX)
- Courtright's (Willow Springs, IL)
- Eiffel Tower at Paris Las Vegas (Las Vegas, NV)
- The Dining Room at Little Palm Island (Little Torch Key, FL)
- Martinique Bistro (New Orleans, LA)

111

SELECTIONS: THE DAILY MEAL

111.1 Overview

The Daily Meal (www.thedailymeal.com), an online resource by Spanfeller Media Group, publishes annual lists of the top restaurants and food trucks in the United States.

Restaurants and food trucks considered for selection are nominated by panel of judges comprised primarily of restaurant critics, food and lifestyle writers, and staff editors. The same panel voted on those nominated based on cuisine, formality of food and atmosphere, level of “buzz,” and other considerations.

111.2 Top Selections 2012

Top 101 Restaurants

1. Le Bernardin (New York, NY)
2. Alinea (Chicago, IL)
3. Chez Panisse (Berkeley, CA)
4. Eleven Madison Park (New York, NY)
5. French Laundry (Yountville, CA)
6. Osteria Mozza (Los Angeles, CA)
7. Per Se (New York, NY)
8. Momofuku Ssäm (New York, NY)
9. Gramercy Tavern (New York, NY)
10. Michel Richard Citronelle (Washington, DC)
11. L’Atelier de Joël Robouchon (New York, NY)
12. Pok Pok (Portland, OR)
13. Blue Hill Stone Barns (Pocantico Hills, NY)
14. Babbo (New York, NY)
15. Franklin Barbecue (Austin, TX)
16. Jean Georges (New York, NY)
17. ABC Kitchen (New York, NY)
18. Peter Luger (Brooklyn, NY)
19. Daniel (New York, NY)
20. Cochon (New Orleans, LA)
21. Marea (New York, NY)
22. Commander’s Palace (New Orleans, LA)

23. Girl & the Goat (Chicago, IL)
24. WD-50 (New York, NY)
25. Animal (Los Angeles, CA)
26. Vetri (Philadelphia, PA)
27. Katz's Deli (New York, NY)
28. Next (Chicago, IL)
29. Bouchon Bistro (Yountville, CA)
30. Frontera Grill (Chicago, IL)
31. Canlis (Seattle, WA)
32. Joël Robuchon (Las Vegas, NV)
33. Pizzeria Bianco (Phoenix, AZ)
34. Le Bec-Fin (Philadelphia, PA)
35. Inn at Little Washington (Washington, VA)
36. Zuni Cafe (San Francisco, CA)
37. Del Posto (New York, NY)
38. The Little Owl (New York, NY)
39. Flour + Water (San Francisco, CA)
40. Kreuz Market (Lockhart, TX)
41. Husk (Charleston, SC)
42. Slanted Door (San Francisco, CA)
43. Masa (New York, NY)
44. Locanda Verde (New York, NY)
45. Fearing's (Dallas, TX)
46. The Modern (New York, NY)
47. Minetta Tavern (New York, NY)
48. Arthur Bryant's (Kansas City, MO)
49. Frank Pepe Pizzeria Napoletana (New Haven, CT)
50. Fig (Los Angeles, CA)
51. Lucques (Los Angeles, CA)
52. August (New Orleans, LA)
53. Roberta's (Brooklyn, NY)
54. Fonda San Miguel (Austin, TX)
55. Mustard's Grill (Napa, CA)
56. Osteria Morini (New York, NY)
57. The Dutch (New York, NY)
58. Galatoire's (New Orleans, LA)
59. Spiaggia (Chicago, IL)
60. Gotham Bar And Grill (New York, NY)
61. Luling City Market (Houston, TX)
62. Le Pigeon (Portland, OR)
63. The Publican (Chicago, IL)
64. Spago (Los Angeles, CA)
65. minibar (Washington, DC)
66. The Barn at Blackberry Farm (Walland, TN)

67. Joe's Stone Crab (Miami, FL)
68. Al Forno (Providence, RI)
69. Beast (Portland, OR)
70. The Herbfarm (Woodinville)
71. Coi (San Francisco, CA)
72. Valentino (Santa Monica, CA)
73. McCrady's (Charleston, SC)
74. Michael's Genuine Food & Drink (Miami, FL)
75. Father's Office (Los Angeles, CA)
76. Ad Hoc (Yountville, CA)
77. Boulud Sud (New York, NY)
78. Gjelina (Venice, CA)
79. The Hitching Post II (Buellton, CA)
80. La Taqueria (San Francisco, CA)
81. The Bazaar (Los Angeles, CA)
82. Casa Mono (New York, NY)
83. Ben's Chili Bowl (Washington, DC)
84. Arun's (Chicago, IL)
85. Son of a Gun (Los Angeles, CA)
86. Zahav (Philadelphia, PA)
87. Palena Café (Washington, DC)
88. O-Ya (Boston, MA)
89. Tertulia (New York, NY)
90. The Four Seasons (New York, NY)
91. Stephan Pyles (Dallas, TX)
92. Boulevard (San Francisco, CA)
93. Charlie Trotter's (Chicago, IL)
94. Jaleo (Las Vegas, NV)
95. SriPraPhai (Queens, NY)
96. The Walrus and the Carpenter (Seattle, WA)
97. Jitlada (Los Angeles, CA)
98. The Pit (Raleigh, NC)
99. Michael Mina (San Francisco, CA)
100. Bar Masa (New York, NY)
101. La Grenouille (New York, NY)

Top 101 Food Trucks

1. Kogi BBQ (Los Angeles, CA)
2. Fojol Brothers (Washington, DC)
3. Big Gay Ice Cream Truck (New York, NY)
4. Border Grill (Los Angeles, CA)
5. Grill 'Em All (Los Angeles, CA)
6. Hapa SF (San Francisco, CA)
7. The Lime Truck (Orange County, CA)

8. Roxy's Gourmet Grilled Cheese (Boston, MA)
9. The Grilled Cheese Truck (Los Angeles, CA)
10. Chef Shack (Minneapolis, MN)
11. Red Hook Lobster Pound (New York, NY)
12. India Jones Chow Truck (Los Angeles, CA)
13. Sam's ChowderMobile (San Francisco, CA)
14. Wafels & Dinges (New York, NY)
15. Jogasaki Truck (Los Angeles, CA)
16. The Buttermilk Truck (Los Angeles, CA)
17. Where Ya At Matt? (Seattle, WA)
18. Red Hook Lobster Truck (Washington, DC)
19. Fukuburger Truck (Las Vegas, NV)
20. The Cinnamon Snail (New York, NY)
21. Maximus/Minimus (Seattle, WA)
22. Bernie's Burger Bus (Houston, TX)
23. Roli Roti Gourmet Rotisserie (San Francisco, CA)
24. Baby's Badass Burgers (Los Angeles, CA)
25. Basil Thyme (Washington, DC)
26. Spencer on the Go (San Francisco, CA)
27. LudoTruck (Los Angeles, CA)
28. Schnitzel & Things (New York, NY)
29. Chairman Bao Bun Truck (San Francisco, CA)
30. Korilla BBQ (New York, NY)
31. Guerrilla Street Food (St. Louis, MO)
32. Smack Shack (Minneapolis, MN)
33. Lobsta Truck (Los Angeles, CA)
34. Staff Meal (Boston, MA)
35. Coreanos (Austin, TX)
36. Fry Smith (Los Angeles, CA)
37. Country Boys/Martinez Taco (New York, NY)
38. Food Shark (Marfa, TX)
39. Clover Food Truck (Boston, MA)
40. Señor Sisig (San Francisco, CA)
41. Luke's Lobster (New York, NY)
42. Nom Nom Truck (Los Angeles, CA)
43. Komodo Truck (Los Angeles, CA)
44. Vizzi Truck (Los Angeles, CA)
45. Fivetenburger (Oakland, CA)
46. El Camión (Seattle, WA)
47. The Grilled Cheeserie (Nashville, TN)
48. Crêpes Bonaparte (Los Angeles, CA)
49. Pepe Food Truck (Washington, DC)
50. Dim Ssäm à gogo by Sakaya Kitchem (Miami, FL)
51. Jefe's Original Fish Taco & Burgers (Miami, FL)

52. 5411 Empanadas (Chicago, IL)
53. DC Slice (Washington, DC)
54. The Mighty Cone (Austin, TX)
55. Taim Mobile (New York, NY)
56. JapaCurry (San Francisco, CA)
57. Biker Jim's Gourmet Dogs (Denver, CO)
58. Oh My Gogi! BBQ (Houston, TX)
59. The Big Cheese (Washington, DC)
60. Lucky Old Souls (Philadelphia, PA)
61. The Southern Mac & Cheese Truck (Chicago, IL)
62. Kung Fu Tacos (San Francisco, CA)
63. Riffs Fine Street Food (Nashville, TN)
64. KoJa Kitchen (San Francisco, CA)
65. Rib Whip (San Francisco, CA)
66. Diggity Donuts/Little Blue Brunch Truc (Charleston, SC)
67. Scratch Truck (Indianapolis, IN)
68. The Eatsie Boys (Houston, TX)
69. Marination Mobile (Seattle, WA)
70. Basic Kneads Pizza (Denver, CO)
71. Rancho Bravo Tacos (Seattle, WA)
72. The Peached Tortilla (Austin, TX)
73. Streetza (Milwaukee, WI)
74. Ms. Cheezious Fresh Made Grilled Cheese (Miami, FL)
75. Souvlaki GR (New York, NY)
76. Liba Falafel Truck (San Francisco, CA)
77. Solber Pupusas (New York, NY)
78. South Philly Experience (Los Angeles, CA)
79. Tasty Kabob (Washington, DC)
80. CapMac (Washington, DC)
81. El Norteño (San Francisco, CA)
82. Tacos El Asadero (Seattle, WA)
83. Cha Cha Chow (St. Louis, MO)
84. Curbside Cravings (Los Angeles, CA)
85. The People's Pig (Portland, OR)
86. Foodie Call (New Orleans, LA)
87. Iyanzé aka "The African Truck" (Chicago, IL)
88. Seoul Sausage (Los Angeles, CA)
89. Empanada Intifada (New Orleans, LA)
90. Sushi Fix (Minneapolis, MN)
91. Momogoose (Boston, MA)
92. Vellee Deli (Minneapolis, MN)
93. Hello My Name is BB (Charleston, SC)
94. Cucina Zapata (Philadelphia, PA)
95. Bloomy's Roast Beef (Minneapolis, MN)

96. Seoul Taco (St. Louis, MO)
97. Tokyo Crêpes (Charleston, SC)
98. The Slide Ride (Chicago, IL)
99. Pot Kettle Blac (Charleston, SC)
100. Happy Grillmore (Seattle, WA)
101. Ebbett's Good to Go (San Francisco, CA)

Best Pizza In America 2012

1. DiFara (Brooklyn, NY)
2. Motorino (New York, NY)
3. John's Pizzeria (New York, NY)
4. Pizano's (Chicago, IL)
5. Vito & Nick's (Chicago, IL)
6. Joe's (New York, NY)
7. Frank Pepe's (New Haven, CT)
8. Gino's East (Chicago, IL)
9. Co. (New York, NY)
10. Fireside Pies (Dallas, TX)
11. Monza (Charleston, SC)
12. Jumbo Slice Pizza (Washington, DC)
13. A16 (San Francisco, CA)
14. Reginelli's (New Orleans, LA)
15. Anthony's Coal Fired Pizza (various locations in Connecticut, Delaware, Florida, New Jersey, New York, Pennsylvania)
16. Roppolo's (Auston, TX)
17. Antonio's Ristorante (Addison, TX)
18. Flour + Water (San Francisco, CA)
19. Gjelina (Los Angeles, CA)
20. Regina Pizzeria (Boston, MA)
21. Sally's Apizza (New Haven, CT)
22. Scuola Vecchia (Delray Beach, FL)
23. Osteria (Philadelphia, PA)
24. DeLorenzo's (Trenton, NJ)
25. Pizzeria Mozza (Los Angeles, CA)
26. Pizzeria Bianco (Phoenix, AZ)
27. Una Pizza Napoletana (San Francisco, CA)
28. Santarpio's (Boston, MA)
28. Al Forno (Providence, RI)
29. Great Lake (Chicago, IL)
30. Spacca Napoli (Chicago, IL)
32. EVO (Charleston, SC)
33. 2Amys (Washington, DC)
34. Pizaro's (Houston, TX)
35. Papa's Tomato Pies (Trenton, NJ)

111.3 Market Resources

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

112

SELECTIONS: TRAVEL + LEISURE

112.1 Overview

Travel + Leisure magazine regularly compiles various lists of top restaurants throughout the U.S. The following are the most recent lists:

112.2 Restaurant and Beverage Service Selections

Best BYO Restaurants

- Bennachin (New Orleans, LA)
- Bonsoirée (Chicago, IL)
- Cafe Rossetti's (Winthrop, MA)
- D-Street Noshery (Portland, OR)
- Five Islands Lobster (Georgetown, ME)
- G'Raj Mahal Café (Austin, TX)
- Iggies (Baltimore, MD)
- Kaz An Nou (New York, NY)
- Lolita (Philadelphia, PA)
- Russian Dacha Café (Los Angeles, CA)
- Thai X-ing (Washington, DC)
- White Tiger Gourmet (Athens, GA)

Best Chinese Restaurants

- A Single Pebble (Burlington, VT)
- Bo Ling's (Kansas City, MO)
- Chiang's Gourmet (Seattle, WA)
- Chou's Kitchen (Chandler, AZ)
- Chung King (Los Angeles, CA)
- Gourmet Dumpling House (Boston, MA)
- Han Dynasty (Philadelphia, PA)
- Hunan Taste (Catonsville, MD)
- Koi Palace (Daly City, CA)
- Lao Sze Chuan (Chicago, IL)
- Little Village Noodle House (Honolulu, HI)
- Mandarin (Salt Lake City, UT)
- Mission Chinese Food (New York, NY and San Francisco, CA)

- Peter Chang Café (Richmond, VA)
- Ping Pang Pong (Las Vegas, NV)
- San Tung Restaurant (San Francisco, CA)
- Sea Harbour Restaurant (Rosemead, CA)
- Shandong (Portland, OR)
- Shanghai Restaurant (Houston, TX)
- Spicy & Tasty (New York, NY)
- Taipei Gourmet (Lexington, MA)
- The Source (Washington, DC)
- Xi'an Famous Foods (New York, NY)
- Yangming Restaurant (Bryn Mawr, PA)

Best Cocktail Bars
- Anvil Bar (Houston, TX)
- Cure (New Orleans, LA)
- Drink (Boston, MA)
- Green Russell (Denver, CO)
- Smuggler's Cove (San Francisco, CA)
- Teardrop Lounge (Portland, OR)
- The Clover Club (Brooklyn, NY)
- The Passenger (Washington, DC)
- The Violet Hour (Chicago, IL)
- Zig Zag Café (Seattle, WA)

Best Comfort Foods
- Absolute Bagels (New York, NY)
  Menu item: Bagels
- Angelini Osteria (Los Angeles, CA)
  Menu item: Lasagna
- Big Bob Gibson Bar-B-Q (Decatur, AL)
  Menu item: Barbecued Chicken
- Burt's Place (Chicago, IL)
  Menu item: Deep-Dish Pizza
- Dolphin Marina & Restaurant (South Harpswell, ME)
  Menu item: Chowder
- Doughnut Plant (New York, NY)
  Menu item: Donuts
- Famous 4th Street Delicatessen (Philadelphia, PA)
  Menu item: Chicken Soup
- Girl & the Goat (Chicago, IL)
  Menu item: French Fries
- Highlands Bar & Grill (Birmingham, AL)
  Menu item: Baked Grits

- Jacques Torres (various locatins, NY and NJ)
  Menu item: Chocolate Chip Cookies
- Johnsons Corner (Loveland, CO)
  Menu item: Cinnamon Roll
- Loveless Café (Nashville, TN)
  Menu item: Biscuits and Gravy
- Meatball Shop (New York, NY)
  Menu item: Meatballs
- Melt Bar and Grilled (Lakewood, OH)
  Menu item: Grilled Cheese
- Moonlite Bar-B-Q Inn (Owensboro, KY)
  Menu item: Ribs
- Prince's Hot Chicken Shack (Nashville, TN)
  Menu item: Friend Chicken
- Quinn's Pub (Seattle, WA)
  Menu item: Burger
- Salt Grass Steak House (Houston, TX)
  Menu item: Chicken-Fried Steak
- Sam Choy's Breakfast, Lunch & Crab (Honolulu, HI)
  Menu item: Loco Moco
- Sarcone's Deli (Philadelphia, PA)
  Menu item: Hoagie
- Slim's Last Chance (Seattle, WA)
  Menu item: Chili
- Slow Bar B Q (Detroit, MI)
  Menu item: Mac 'n Cheese
- Stanley's Kitchen and Tap (Chicago, IL)
  Menu item: Mashed Potatoes
- Susiecakes (Los Angeles, CA)
  Menu item: Cupcakes
- The Aroma Pie Shop (Whalan, MN)
  Menu item: Pie
- The Blacksmith (Bend, OR)
  Menu item: Meatloaf
- The Little Nell (Aspen, CO)
  Menu item: Hot Chocolate
- The Original Pancake House (Portland, OR)
  Menu item: Pancakes
- The Red Hot (Tacoma, WA)
  Menu item: Hot Dog
- Wong (New York, NY)
  Menu item: Ice Cream

Best Donuts

- Bob's Donut & Pastry Shop (San Francisco, CA)
- Bomboloni (New York, NY)
- Bouchon Bakery (Yountville, CA)
- Café Du Monde (New Orleans, LA)
- Coffee An' Donut Shop (Westport, CT)
- Doughnut Plant (New York, NY)
- Dynamo Donut and Coffee (San Francisco, CA)
- Fractured Prune (Ocean City, MD)
- Frosty's Donut & Coffee Shop (Brunswick, ME)
- Kane's Donuts (Saugus, MA)
- Mighty-O Donuts (Seattle, WA)
- Nicola's Donuts (Tampa, FL)
- Old Fashioned Donuts (Chicago, IL)
- Peter Pan Bakery (Brooklyn, NY)
- Randy's Donuts (Los Angeles)
- Round Rock Donuts (Round Rock, TX)
- Spudnut Shop (Richland, WA)
- Stan's Doughnuts (Westwood Village, CA)
- Sublime Doughnuts (Atlanta, GA)
- Top Pot Doughnuts (Seattle, WA)
- Voodoo Doughnut (Portland, OR)
- Walton Donuts (Denver, CO)

Best Fried Chicken

- Barbecue Inn (Houston, TX)
- Blue Ribbon Sushi Bar and Grill (New York, NY)
- Crisp (Chicago, IL)
- Hollyhock Hill (Indianapolis, IN)
- Max's Wine Dive (Austin, TX)
- Prince's Hot Chicken Shack (Nashville, TN)
- Rack & Soul (New York, NY)
- Restaurant Eugene (Atlanta, GA)
- Roscoe's House of Chicken and Waffles (Los Angeles, CA)
- Side Street Inn (Honolulu, HI)
- Spring Hill (Seattle, WA)

Best French Fries

- Al's French Fry (Burlington, VT)
- Amsterdam Bar & Hall (Saint Paul, MN)
- Blue Duck Tavern (Washington, DC)
- Boise Fry Company (various locations, Idaho)

- Bourbon Steak (Miami, FL)
- Chego (Los Angeles, CA)
- Coreanos (Austin, TX)
- Duckfat (Portland, ME)
- Flip Burger Boutique (Atlanta, GA)
- Gilroy Garlic Fries at AT&T Park (San Francisco, CA)
- Green Pig Bistro (Arlington, VA)
- Hot Doug's (Chicago, IL)
- Hubcap Grill (Houston, TX)
- Jasper's Corner Tap (San Francisco, CA)
- Jonesy's EatBar (Denver, CO)
- La Boca (New Orleans, LA)
- Pike Street Fish Fry (Seattle, WA)
- Pomme Frites (New York, NY)
- Saus (Boston, MA)
- Thrasher's (Ocean City, MD)
- The Breslin Bar & Dining Room (New York, NY)
- The Green Room (Greenville, SC)
- The Original Hot Dog Shop (Pittsburgh, PA)
- Violetta (Portland, OR)

Best Italian Restaurants
- Acquerello (San Francisco, CA)
- Al Forno (Providence, RI)
- Assaggio (Seattle, WA)
- Bar La Grassa (Minneapolis, MN)
- Bartolotta (Las Vegas, NV)
- Caffé Mingo (Portland, OR)
- Da Marco (Houston, TX)
- Del Posto (New York, NY)
- Domenica (New Orleans, LA)
- Flour + Water (San Francisco, CA)
- Frank Pepe Pizzeria Napoletana (New Haven, CT)
- Frasca (Boulder, CO)
- Harry's Pizzeria (Miami, FL)
- Jasper's (Kansas City, MO)
- L'Amante (Burlington, VT)
- Mani Osteria (Ann Arbor, MI)
- Marea (New York, NY)
- Obelisk (Washington, DC)
- Osteria Mozza/Pizzeria Mozza (Los Angeles, CA)
- Palena Café (Washington, DC)
- Pizzeria Bianco (Phoenix, AZ)

- Roberta’s (Brooklyn, NY)
- Spiaggia (Chicago, IL)
- Terramia Ristorante (Boston, MA)
- The Backspace (Austin TX)
- Tony’s (St. Louis, MO)
- Trattoria Lucca (Charleston, SC)
- Tulio (Seattle, WA)
- Valentino (Santa Monica, CA)
- Vetri (Philadelphia, PA)

Best Pancakes
- Hawaiian Style Café (Big Island, HI)
- Hominy Grill (Charleston, SC)
- Lake Placid Lodge (Lake Placid, NY)
- Lula (Chicago, IL)
- Prune (New York, NY)
- Stanley (New Orleans, LA)
- The Downyflake (Nantucket, MA)
- The Farmers Diner (Quechee, VT)
- The Griddle Café (West Hollywood, CA)
- The Original Pancake House (Portland, OR)

Best Places To Drink Tea
- Harney & Sons (New York, NY)
- Ku Cha House of Tea (Boulder, CO)
- Park Hyatt (Washington, DC)
- Samovar Tea Lounge (San Francisco, CA)
- Seven Cups (Tucson, AZ)
- Steven Smith Teamaker (Portland, OR)

Best Seafood Restaurants
- Anchor & Hope (San Francisco, CA)
- Cantler’s Riverside Inn (Annapolis, MD)
- Casamento’s (New Orleans, LA)
- Coastal Cold Storage (Petersburg, AK)
- Dave’s Carry-Out (Charleston, SC)
- DC Coast (Washington, DC)
- Dock’s Oyster House (Atlantic City, NJ)
- Garcia’s Seafood Grille & Fish Market (Miami, FL)
- GT Fish & Oyster (Chicago, IL)
- Hogfish Bar & Grill (Stock Island, FL)

- Jake's Famous Crawfish (Portland, OR)
- Jax Fish House & Oyster Bar (Denver, CO)
- Le Bernardin (New York, NY)
- Little Fish BYOB (Philadelphia, PA)
- Maison Premiere (Brooklyn, NY)
- Mama's Fish House (Maui, HI)
- Marshall Store (Tomales Bay, CA)
- Neptune Oyster (Boston, MA)
- Red Fish Grill (New Orleans, LA)
- Reef (Houston, TX)
- RM Seafood (Las Vegas, NV)
- Sea Change (Minneapolis, MN)
- Shaw's Fish and Lobster (New Harbor, ME)
- Son of a Gun (Los Angeles, CA)
- Star Fish Company (Cortez, FL)
- Straight Wharf Restaurant (Nantucket, MA)
- The Clam Shack (Kennebunkport, ME)
- The Optimist (Atlanta, GA)
- The Walrus and the Carpenter (Seattle, WA)
- Uchi + Uchiko (Austin, TX)
- Water Grill (Los Angeles, CA)

Best Wine Bars
- 20 Brix (Cincinnati, OH)
- Bacchanal (New Orleans, LA)
- Bar Covell (Los Angeles, CA)
- Barcelona (Atlanta, GA)
- Bin No. 18 (Miami, FL)
- Caveau Wine Bar (Denver, CO)
- D.O.C. Wine Bar (Chicago, IL)
- Domacin (Stillwater, MN)
- Flight Wine Bar (Rochester, NY)
- Grotto Wine Bar (Cleveland, OH)
- Kazimierz World Wine Bar (Scottsdale, AZ)
- Kir (Portland, OR)
- Lelabar (New York, NY)
- Max's Wine Dive (Austin, TX)
- Poco Wine Room (Seattle, WA)
- Sonoma Wine Bar (Houston, TX)
- The Ten Bells (New York, NY)
- The Butcher Shop (Boston, MA)
- The Hidden Vine (San Francisco, CA)
- Tinto (Philadelphia, PA)

- Veritas (Washington, DC)
- Veritas Wine Room (Dallas, TX)
- Vino Italia Tapas (Honolulu, HI)
- West End Wine Bar (Chapel Hill, NC)
- Zin Wine Bar (Healdsburg, CA)

Coolest Coffeehouses

- Arabica Coffee Company (Portland, ME)
- Beach Bum Café (Honolulu, HI)
- Blue Bottle Coffee (San Francisco, CA)
- Busboys and Poets (Washington, DC)
- Café Demetrio (Miami, FL)
- Café du Monde (New Orleans, LA)
- Coava (Portland, OR)
- Coffee Slingers (Oklahoma City, OK)
- Comet Coffee (Ann Arbor, MI)
- Espresso Vivace Roasteria (Seattle, WA)
- Four Barrel (San Francisco, CA)
- Intelligentsia Coffee & Tea (Chicago, IL)
- Kopplin's Coffee (Saint Paul, MN)
- Lamill Coffee Boutique (Los Angeles, CA)
- Octane Coffee House & Lounge (Atlanta, GA)
- One Shot Coffee (Philadelphia, PA)
- Otherlands Coffee Bar (Memphis, TN)
- PJ's Coffee (New Orleans, LA)
- Pavement Coffee House (Boston, MA)
- Progress Coffee (Austin, TX)
- RBC (New York, NY)
- Spro (Baltimore, MD)
- Stumptown (Portland, OR)
- The Roasterie Café (Kansas City, MO)
- The Roasting Plant (New York, NY)

113

SELECTIONS: ZAGAT

113.1 Best Burgers

Zagat Survey (www.zagat.com) selected the following as the best restaurants for a burger:

Atlanta, GA
- The Vortex

Baltimore, MD
- Linwoods (Owings Mills)

Boston, MA
- Mr. Bartley's

Charlotte, NC
- Bad Daddy's Burger Bar

Chicago, IL
- Edzo's Burger Shop (Evanston)

Dallas/Fort Worth, TX
- Maple & Motor

Denver, CO
- Crave Real Burgers (Castle Rock)

Fort Lauderdale, FL
- Le Tub (Hollywood)

Honolulu, HI
- Kua 'Aina Sandwich (North Shore)

Houston, TX
- Goode Co. Burgers

Kansas City, KS
- Burgers Stand at the Casbah (Lawrence)

Las Vegas, NV
- Slidin' Thru

Los Angeles, CA
- Golden State

Miami, FL
- Flip Burger Bar (North Miami)

New York, NY
- Burger Joint

Orlando, FL
- Pine Twenty2

Philadelphia, PA
- Sketch

Portland, OR
- Killer Burger

Sacramento, CA
- Squeeze Inn

Salt Lake City, UT
- Hires Big H

San Diego, CA
- In-N-Out Burger

San Francisco
- 900 Grayson (Berkley)

Seattle, WA
- Broiler Bay (Bellevue)

113.2 Best Business Lunch

Zagat Survey selected the following as the best restaurants in major cities for a power lunch:

Atlanta, GA

- Bones

Austin, TX

- Trio

Boston, MA

- Menton

Chicago, IL

- Topolobampo

Dallas, TX

- The Mansion Restaurant at Rosewood Mansion on Turtle Creek

Houston, TX

- Mark's American Cuisine

Las Vegas, NV

- Capital Grille

Los Angeles, CA

- Providence

Miami, FL

- Joe's Stone Crab

Minneapolis, MN

- Manny's Steakhouse

New Orleans, LA

- Commander's Palace

New York, NY

- The Four Seasons

Philadelphia, PA

- Capital Grille

Phoenix, AZ
- Durant's

San Diego, CA
- WineSellar & Brasserie

San Francisco, CA
- Boulevard

Seattle, WA
- The Metropolitan Grill

St. Louis, MO
- Anthony's

Washington, DC
- Central Michel Richard

113.3 Best Sandwiches

Zagat Survey selected the following as the best restaurants for a sandwich:

Atlanta, GA
- Rising Roll Gourmet

Baltimore, MD
- Attman's Delicatessen

Boston, MA
- Flour Bakery & Café

Chicago, IL
- Fontano's Subs

Cleveland, OH
- Melt Bar & Grilled

Columbus, OH
- Katzinger's

Fort Lauderdale, FL
- LaSpada's Original Hoagies

Las Vegas, NV
- Capriotti's Sandwich Shop

Los Angeles, CA
- Langer's Deli

New Orleans, LA
- Domilise's Po-Boys

New York, NY
- Num Pang

Philadelphia, PA
- John's Roast Pork

Portland, OR
- Bunk Sandwiches

San Diego, CA
- Cheese Shop

San Francisco
- Saigon Sandwiches

Seattle, WA
- Paseo

Washington, DC
- C.F. Folks

113.4 Best Service

Zagat Survey (February 2013) selected the following restaurants for service in 25 metropolitan areas:

Atlanta, GA
- Bone's Restaurant

Austin, TX
- Congress

Baltimore, MD
- Charleston

Boston, MA
- Menton

Chicago, IL
- Next

Cincinnati, OH
- Orchids at Palm Court at the Hilton Netherland Plaza

Cleveland, OH
- Giovanni's Ristorante

Columbus, OH
- Refectory

Dallas, TX
- French Room in the Hotel Adolphus

Detroit, MI
- Moro's Dining (Allen Park)

Houston, TX
- Brennan's

Indianapolis, IN
- The Capital Grille

Kansas City, KS/MO
- Café Provence (Prairie Village, KS)

Los Angeles, CA
- Providence

Las Vegas, NV
- Michael's at the South Point Hotel

Minneapolis, MN
- La Belle Vie

New York, NY
- Per Se in the Time Warner Center

Philadelphia, PA
- Fountain Restaurant at the Four Seasons

Portland, OR
- The Painted Lady (Newberg, OR)

San Antonio, TX
- Chama Gaucha

San Diego, CA
- Addison at the Grand Del Mar

San Francisco, CA
- Gary Danko

Salt Lake City, UT
- The Mariposa (Deer Valley, UT)

St. Louis, MO
- Anthony's

Washington, DC
- Inn at Little Washington (Washington, VA)

113.5 Business Trip Dining

Zagat Survey selected the following restaurants in major metropolitan areas as the best for dining during a business trip:

Atlanta, GA
1. Bacchanalia
2. Quinones Room
3. Aria
4. McKendrick's
5. Bone's

Atlantic City, NJ
1. Old Homestead
2. Il Mulino
3. Chef Vola's
4. White House
5. Girasole

Austin, TX
1. Uchi
2. Eddie V's
3. Wink
4. Torchy's Tacos
5. Vespaio

Baltimore/Annapolis, MD
1. Charleston
2. Volt
3. Prime Rib
4. Samos
5. Di Pasquale's

Boston, MA
1. O Ya
2. Oleana
3. La Campania
4. Nuptune Oyster
5. Lumiere

Charlotte, NC
1. Barrington's
2. McNinch House
3. Fiamma
4. Fig Tree
5. Toscana

Chicago, IL
1. Les Nomades
2. Alinea
3. Schwa
4. Arun's
5. Topolobampo

Cincinnati, OH
1. Boca
2. Nicola's
3. Daveed's
4. Jeff Ruby's Precinct
5. Orchids

Cleveland, OH
1. Chez Francois
2. Johnny's Bar
3. Parallax
4. Lola
5. Downtown 140

Columbus, OH
1. L'Antibes
2. Refectory
3. Akai Hana
4. Cameron's
5. G. Michael's

Connecticut
1. Le Petit Cafe
2. PolytechnicON20
3. Thomas Henkelmann
4. Mill at 2T
5. Jean-Louis

Dallas/Ft. Worth, TX
1. Bonnell's
2. Saint Emilion
3. French Room
4. Cacharel
5. Pappas Bros.

Denver, CO
1. Fruition
2. Frasca
3. Matsuhisa
4. Splendido
5. Mizuna

Detroit, MI
1. Lark
2. Bacco
3. Common Grill
4. Zingerman's
5. Cafe Cortina

Fort Lauderdale, FL
1. La Brochette
2. Cafe Sharaku
3. Canyon
4. Casa D'Angelo
5. Eduardo de San Angel

Honolulu, HI
1. Sushi Sasabune
2. Hiroshi
3. Alan Wong's
4. La Mer
5. Chef Mavro

Houston, TX
1. Le Mistral
2. Kanomwan
3. Pappas Bros. Steakhouse
4. Mark's
5. Da Marco

Kansas City, MO
1. Justus Drugstore
2. Bluestem
3. Michael Smith
4. Oklahoma Joe's
5. Le Fou Frog

Las Vegas, NV
1. Joël Robuchon at the Mansion
2. Todd's Unique Dining
3. Steak House
4. Raku
5. Sen of Japan

Long Island, NY
1. North Fork Table
2. Siam Lotus
3. Mosaic
4. Kitchen A Trattoria
5. Maroni

Los Angeles, CA
1. Matsuhisa
2. Angelini Osteria
3. Asanebo
4. Melisse
5. Urasawa

Miami, FL
1. Naoe
2. Palme d'Or
3. Zuma
4. Palm
5. Il Gabbiano

Milwaukee, WI
1. Roots
2. Sanford
3. Eddie Martini's
4. Bartolotta's Lake Park
5. Ristorante Bartolotta

Minneapolis/Saint Paul, MN
1. La Belle Vie
2. 112 Eatery
3. Vincent
4. Alma
5. Bar La Grassa

Naples, FL
1. Cote d'Azur
2. Bleu Provence
3. USS Nemo
4. Truluck's
5. Capital Grille

New Jersey
1. Nicholas
2. Shumi
3. Sapori
4. Washington Inn
5. Lorena's

New Orleans, LA
1. Bayona
2. Stella!
3. Brigtsen’s
4. Clancy’s
5. Royal China

New York, NY
1. Le Bernardin
2. Daniel
3. Per Se
4. Bouley
5. Jean Georges

Orange County, CA
1. Marche Moderne
2. Basilic
3. Tradition by Pascal
4. Hobbit
5. Studio

Orlando, FL
1. Victoria & Albert’s
2. 4 Rivers
3. Del Frisco’s
4. Jiko
5. California Grill

Palm Beach, FL
1. Marcello’s La Sirena
2. Chez Jean-Pierre
3. 11 Maple St.
4. Captain Charlie’s
5. Cafe L’Europe

Philadelphia, PA
1. Vetri
2. Fountain
3. Birchrunville Store
4. Amada
5. Gilmore’s

Phoenix/Scottsdale, AZ
1. Kai
2. Binkley’s
3. Quiessence
4. Noca
5. Barrio Cafe

Portland, OR
1. Painted Lady
2. Apizza Scholls
3. Beast
4. Toro Bravo
5. Nuestra Cocina

Sacramento, CA
1. Taste
2. Ambience
3. Mulvaney’s
4. Kitchen
5. Sunflower Drive-In

Salt Lake City, UT
1. Mariposa
2. Forage
3. Takashi
4. Mandarin
5. Tree Room

San Antonio, TX
1. Dough
2. Il Sogno
3. Bohanan’s
4. Frederick’s
5. Bistro Vatel

San Diego, CA
1. Market
2. Sushi Ota
3. Hane Sushi
4. Wine Vault
5. Addison

San Francisco, CA

1. Gary Danko
2. French Laundry
3. Cyrus
4. Manresa
5. Aubergine

Seattle, WA

1. Cafe Juanita
2. Paseo
3. Mashiko
4. Spinasse
5. Herbfarm (Woodinville)

St. Louis, MO

1. Niche
2. Stellina
3. Sidney St. Cafe
4. Trattoria Marcella
5. Tony's

Tampa/Sarasota, FL

1. Beach Bistro
2. Pane Rustica
3. Bern's Steak House
4. Cafe Ponte
5. Maison Blanche

Tucson, AZ

1. Fleming's Prime
2. Vivace
3. Dish
4. Le Rendez-Vous
5. Cafe Poca Cosa

Washington, DC

1. Marcel's
2. Inn at Little Washington
3. Komi
4. CityZen
5. Rasika

Westchester/Hudson Valley

1. Sushi Nanase
2. Xaviars at Piermont
3. Il Cenacolo
4. Freelance Cafe
5. Buffet de la Gare

113.6 Hotel Restaurants

Zagat Survey selected the following top hotel restaurants in 25 metropolitan areas:

Atlanta, GA

- La Grotta Ravinia (Crowne Plaza Ravinia)

Austin, TX

- Driskill Grill (Driskill Hotel)

Boston, MA

- Clio (Eliot)

Chicago, IL

- The Lobby (The Peninsula)

Dallas/ Fort Worth, TX

- French Room (The Adolphus)

Denver, CO

- Restaurant Kevin Taylor (Hotel Teatro)

Detroit, MI

- Saltwater (MGM Grand Casino)

Honolulu, HI

- La Mer (Halekulani)

Houston, TX

- Quattro (Four Seasons)

Las Vegas, NV

- L'Atelier de Jol Robuchon (MGM Grand)

Los Angeles, CA

- Saam at the Bazaar by Jos Andrs (SLS at Beverly Hills)

Miami, FL
- Palme d'Or (Biltmore)

Milwaukee, WI
- Osteria del Mondo (Knickerbocker)

Minneapolis, MN
- Manny's Steakhouse (W Minneapolis - The Foshay)

New Orleans, LA
- Stella! (Hotel Provincial)

New York, NY
- Jean Georges (Trump International)

Orlando, FL
- Victoria & Albert's (Disney's Grand Floridian Resort & Spa)

Philadelphia, PA
- Fountain Restaurant (Four Seasons)

Phoenix, AZ
- T. Cook's (Royal Palms Resort & Spa)

Salt Lake City, UT
- Spencer's For Steaks & Chops (Hilton Salt Lake City Center)

San Antonio, TX
- Las Canarias (Omni La Mansin del Rio)

San Diego, CA
- Addison (The Grand Del Mar)

San Francisco, CA
- Masa's (Hotel Vintage Court)

Seattle, WA
- Inn at Langley (Inn at Langley)

Washington, DC
- CityZen (Mandarin Oriental)

113.7 Market Resources

Zagat Survey, 4 Columbus Circle, 3rd Floor, New York, NY 10019. (800) 540-9609. (www.zagat.com)

114

STAR DIAMOND AWARD

114.1 Overview

Since 1949, the American Academy of Hospitality Sciences (AAHS) has recognized restaurants with its Star Diamond Award (www.stardiamondaward.com).

114.2 Five Star Diamond Awards 2013

Five Star Diamond designations were given to the following U.S. restaurants:

- ABC Kitchen (New York, NY)
- Adour Alain Ducasse (New York, NY)
- Bouley (New York, NY)
- Anaheim White House Restaurant (Anaheim, CA)
- Bryant & Cooper Steakhouse (Roslyn, NY)
- Café L' Europe (Palm Beach, FL)
- Cafe Milano (Washington, DC)
- Cipollini (Manhasset, NY)
- City Hall (New York, NY)
- Da Umberto (New York, NY)
- David Burke Fromagerie (Rumson, NJ)
- David Burke Kitchen (New York, NY)
- David Burke Prime (Mashantucket, CT)
- David Burke Townhouse (New York, NY)
- David Burke's Primehouse (Chicago, IL)
- Empire Steak House (New York, NY)
- Fishtail by David Burke (New York, NY)
- Garwood Lounge & Piano Bar (Fisher Island, FL)
- Gigino Trattoria (New York, NY)
- Giumarello's (Westmont, NJ)
- J & G Steakhouse (Washington D.C.)
- Jean Georges (New York, NY)
- Jungsik (New York, NY)
- Le Bernardin (New York, NY)
- La Dorada (Coral Gables, FL)
- MEGU Midtown (New York, NY)
- Mr. K's (New York, NY)

- ON20 (Hartford, CT)
- Ortanique On The Mile (Coral Gables, FL)
- Park Side Restaurant (Corona, NY)
- Paul & Jimmy's (New York, NY)
- Per Se Restaurant (New York, NY)
- Quattro Gastronomia Italiana (Miami Beach, FL)
- Seasonal Restaurant & Weinbar (New York, NY)
- Smoke Rise Village Inn (Kinnelon, NJ)
- Spice Market (New York, NY)
- Thai Spice (Fort Lauderdale, FL)
- The Forge Restaurant Wine Bar (Miami Beach, FL)
- The Mercer Kitchen (New York, NY)
- Toku (Manhasset, NY)

115

THE NRN 50

115.1 Overview

The NRN 50 is an annual feature of *Nation's Restaurant News*. The 2013 list presented the restaurant industry's "Breakout Brands."

> **"NRN's nationwide network of editors scouted their regions looking for unique up-and-coming brands. The criteria to qualify as a "Breakout Brand" were both concrete and intuitive. Brands had to range in size from a couple of units to 75, have an interesting point of differentiation and have demonstrable expansion plans. We profile some of today's hottest emerging concepts – ones making their marks with their innovative experiences and cutting-edge cuisines."**
>
> Robin Lee Allen, Executive Editor
> *Nation's Restaurant News*, 1/28/13

115.2 Breakout Brands 2013

The following Breakout Brands comprise the 2013 NRN 50:

- 5 Napkin Burger
- America's Taco Shop
- Argo Tea
- Asian Box
- Bagger Dave's Legendary Burger Tavern
- Bar Louie

- Blue Lemon
- Boloco
- Brick House Tavern + Tap
- Bruxië
- Burtons Grill
- Cafe Rio Mexican Grill
- Cheeseboy
- Chop't Creative Salad Co.
- Cooper's Hawk Winery & Restaurant
- Evolution Fresh
- Fresh to Order
- Garbanzo Mediterranean Grill
- HuHot Mongolian Grill
- Jeni's Splendid Ice Creams
- Jim 'N Nick's Bar-B-Q
- Just Salad
- Little Greek
- Marlow's Tavern
- Max's Wine Dive
- Meatheads
- Melt Bar & Grilled
- Mendocino Farms
- MOD Pizza
- Patxi's Pizza
- Plada Italian Street Food
- Pitfire Artisan Pizza
- Protein Bar
- Pure Taqueria
- Rosa Mexicano
- Roti Mediterranean Grill
- Seasons 52
- Shake Shack
- Snooze, an A.M. Eatery
- Spin! Neapolitan Pizza
- Tender Greens
- Texas de Brazil
- The Meatball Shop
- The Melt
- Tom & Eddie's
- Toppers Pizza
- True Food Kitchen
- Umami Burger
- Veggie Grill
- Zoës Kitchen

115.3 Market Resources

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

116

TOP BEER BARS

116.1 Award Winners 2013

Draft designates America's 100 Best Beer Bars annually. The following are the 2013 designations:

Alabama

- The J. Clyde Hot Rock Tavern and Alehouse (Birmingham)
- The Nook (Huntsville)

Arizona

- Papago Brewing Co. (Scottsdale)

California

- Beer Revolution (Oakland)
- Blind Lady Ale House (San Diego)
- Blue Palms Brewhouse (Hollywood)
- Churchill's Pub and Grille (San Marcos)
- El Prado (Los Angeles)
- Encinitas Ale House (Encinitas)
- Father's Office (Santa Monica)
- Hamilton's Tavern (San Diego)
- La Trappe Café (San Francisco)
- Little Bear (Los Angeles)
- O'Brien's American Pub (San Diego)
- Small Bar (San Diego)
- Surly Goat (Hollywood)
- The Daily Pint (Los Angeles)
- The Toronado Pub (San Francisco)
- The Trappist (Oakland)
- Tiger! Tiger! (San Diego)
- Tony's Darts Away (Burbank)

Colorado

- Falling Rock (Denver)

District of Columbia

- ChurchKey (Washington)

Florida
- Mr. Beery's (Sarasota)
- Redlight, Redlight (Orlando)

Georgia
- Brick Store Pub (Atlanta)
- The Porter Beer Bar (Atlanta)
- Trappeze Pub (Athens)

Illinois
- Bangers & Lace (Chicago)
- Fountainhead (Chicago)
- Local Option (Chicago)
- Map Room (Chicago)
- Michael & Louise's Hopleaf Bar (Chicago)
- Old Town Pour House (Chicago)
- Sheffield's (Chicago)

Indiana
- Heorot (Muncie)

Iowa
- El Bait Shop (Des Moines)
- Royal Mile (Des Moines)

Kentucky
- Holy Grale (Louisville)
- Sergio's World Beers (Louisville)

Louisiana
- The Avenue Pub (New Orleans)

Maine
- Ebenezer's Pub (Lovell)
- Novare Res Bier Café (Portland)
- The Great Lost Bear (Portland)

Maryland
- Max's Taphouse (Baltimore)
- The Brewer's Art (Baltimore)

Massachusetts
- Deep Ellum (Allston)

- The Publick House (Brookline)
- Sunset Grill & Tap (Allston)

Michigan
- Ashley's (Ann Arbor)
- Clubhouse BFD (Rochester Hills)
- Hopcat (Grand Rapids)
- The Mitten Bar (Ludington)

Minnesota
- Republic (Minneapolis)
- The Happy Gnome (Saint Paul)

Missouri
- Bridge (St. Louis)
- International Tap House (St. Louis)
- The Foundry (Kansas City)

Nebraska
- Crescent Moon Ale House (Omaha)
- Krug Park (Omaha)

New York
- Bierkraft (Brooklyn)
- Blind Tiger (New York)
- Rattle N Hum (New York)
- Spuyten Duyvil (Brooklyn)
- Top Hops Beer Shop (New York)

North Carolina
- Brewmasters Bar & Grill (Raleigh)
- Busy Bee Café (Raleigh)
- Growlers Pourhouse (Charlotte)
- Harrika's Brew Haus (Swansboro)
- Thirsty Monk (Asheville)

Ohio
- Buckeye Beer Engine (Lakewood)
- La Cave Du Vin (Cleveland)
- McNulty's Bier Markt (Cleveland)

Oklahoma
- TapWerks Alehouse & Café (Oklahoma City)

Oregon
- Apex (Portland)
- Bailey's TapRoom (Portland)
- Belmont Station (Portland)
- Horse Brass Pub (Portland)
- Saraveza Bottle Shop & Pasty Tavern (Portland)

Pennsylvania
- Eulogy Belgian Tavern (Philadelphia)
- Memphis Taproom (Philadelphia)
- Monk's Café (Philadelphia)
- The Farmhouse (Emmaus)
- The Grey Lodge Public House (Philadelphia)

South Carolina
- Closed for Business (Charleston)

Texas
- Draught House (Austin)
- Petrol Station (Houston)
- Strangeways (Dallas)
- The Hay Merchant (Houston)

Vermont
- Three Penny Taproom (Montpelier)

Washington
- Beveridge Place Pub (Seattle)
- Naked City Tap House (Seattle)
- Stumbling Monk (Seattle)
- The Pine Box (Seattle)

Wisconsin
- Palm Tavern (Milwaukee)
- Romans' Pub (Milwaukee)
- Sugar Maple (Milwaukee)
- The Malt House Tavern (Madison)

117

TOP RESTAURANT BRANDS

117.1 Overview

Since 2003, The EquiTrend® study by Harris Poll (www.harrisinteractive.com) has rated U.S. restaurant brands based on familiarity, quality, and purchase consideration.

117.2 Top Brand Scores 2011

The 2011 EquiTrend® study was conducted online among 25,099 U.S. consumers ages 15 and older. The following were the top ranked U.S. restaurant brands:

Casual-Dining Chains

- Panera Bread: 69.7
- Longhorn Steakhouse: 65.4
- Bonefish Grill: 65.1
- Applebee's: 62.9
- IHOP (International House of Pancakes): 62.6

Quick-Service Chains

- Subway: 73.1
- Dairy Queen: 69.6
- Wendy's: 68.7
- Five Guys Burgers and Fries: 68.3
- Chick-fil-A: 66.2
- McDonald's: 64.7
- Burger King: 62.8

117.3 Market Resources

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

118

WINE SPECTATOR GRAND AWARD

118.1 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 2012, there were 2,842, 878, and 75 recipients of these awards, respectively.

118.2 Award Recipients 2012

U.S. Grand Award recipients in 2012 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)
- Valentino (Santa Monica)
- The WineSellar & Brasserie (San Diego)

Colorado
- Flagstaff House Restaurant (Boulder)
- Montagna at the Little Nell (Aspen)

Florida
- Bern's Steak House (Tampa)
- L'Escalier at the Breakers (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 (Nantuckett)

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)
- Piero Selvaggio Valentino at The Venetian (Las Vegas)
- Restaurant Guy Savoy (Las Vegas)

New Jersey
- Park & Orchard Restaurant (East Rutherford)
- 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)
- Gilt (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)

PART X: FOOD & BEVERAGE DESIGNATIONS

119

NATIONAL FOOD & BEVERAGE HOLIDAYS

119.1 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.

119.2 National Food & Beverage Days

January

- January 1: Bloody Mary Day
- January 1: Apple Gifting Day
- January 2: National Cream Puff Day
- January 3: Chocolate-Filled Cherry Day
- January 4: National Spaghetti Day
- January 5: National Whipped Cream Day
- January 6: Bean Day
- January 6: National Shortbread Day
- January 7: National Tempura Day
- January 8: English Toffee Day
- January 9: National Apricot Day
- January 10: Bittersweet Chocolate Day
- January 11: Hot Toddy Day
- January 11: Milk Day
- January 12: Curried Chicken Day
- January 13: National Peach Melba Day
- January 14: National Hot Pastrami Sandwich Day
- January 15: Strawberry Ice Cream Day
- January 16: International Hot & Spicy Food Day
- January 16: National Fig Newton Day

- January 17: Hot-Buttered Rum Day
- January 18: Peking Duck Day
- January 19: National Popcorn Day
- January 20: National Buttercrunch Day
- January 20: National Cheese Lover's Day
- January 20: National Coffee Break Day
- January 20: National Granola Bar Day
- January 21: New England Clam Chowder Day
- January 22: National Blonde Brownie Day
- January 23: National Pie Day
- January 24: National Peanut Butter Day
- January 25: National Irish Coffee Day
- January 26: National Pistachio Day
- January 27: Chocolate Cake Day
- January 28: National Blueberry Pancake Day
- January 29: National Corn Chip Day
- January 30: National Croissant Day
- January 31: Brandy Alexander Day

February

- February 1: Baked Alaska Day
- February 2: Heavenly Hash Day
- February 3: Carrot Cake Day
- February 4: Homemade Soup Day
- February 5: National Chocolate Fondue Day
- February 6: National Frozen Yogurt Day
- February 7: National Fettuccine Alfredo Day
- February 8: National Molasses Bar Day
- February 9: National Bagels and Lox Day
- February 10: National Cream Cheese Brownie Day
- February 11: National Peppermint Patty Day
- February 12: National Plum Pudding Day
- February 13: National Tortini Day
- February 14: National Cream Filled Chocolates Day
- February 15: International Gumdrop Day
- February 16: National Almond Day
- February 17: National Cafe Au Lait Day
- February 18: National Crab Stuffed Flounder Day
- February 19: National Chocolate Mint Day
- February 20: National Cherry Pie Day
- February 21: National Sticky Bun Day
- February 22: National Margarita Day
- February 23: National Banana Bread Day
- February 24: National Tortilla Chip Day

- February 25 National Chocolate Covered Peanuts Day
- February 26: National Pistachio Day
- February 27: National Kahlua Day
- February 28: National Chocolate Souffle Day

March

- March 1: National Peanut Butter Lover's Day
- March 2: National Banana Cream Pie Day
- March 3: National Mulled Wine Day
- March 4: National Pound Cake Day
- March 5: National Cheese Doodle Day
- March 6: National Frozen Food Day
- March 7: National Crown Roast of Pork Day
- March 8: National Peanut Cluster Day
- March 9: National Crabmeat Day
- March 10: National Blueberry Popover Day
- March 11: National Oatmeal-Nut Waffle Day
- March 12: National Baked Scallops Day
- March 13: National Coconut Torte Day
- March 14: National Potato Chip Day
- March 15: National Pears Helene Day
- March 16: National Artichoke Hearts Day
- March 17: National Green Beer Day
- March 18: National Lacy Oatmeal Cookie Day
- March 19: National Chocolate Carmel Day
- March 20: National Ravioli Day
- March 21: National French Bread Day
- March 22: National Bavarian Crepes Day
- March 23: National Chip and Dip Day
- March 24: National Chocolate Covered Raisins Day
- March 25: National Lobster Newburg Day
- March 26: National Nougat Day
- March 27: National Spanish Paella Day
- March 28: National Black Forest Cake Day
- March 28: Something On A Stick Day
- March 29: National Lemon Chiffon Cake Day
- March 30: Turkey Neck Soup Day
- March 31: National Clams on the Half Shell Day
- March 31: Oranges and Lemons Day
- March 31: Tater Day

April

- 1st Monday: Sweet Potato Day
- Good Friday: National Hot Cross Bun Day

- Easter: National Baked Ham with Pineapple Day
- April 1: National Sourdough Bread Day
- April 2: National Peanut Butter & Jelly Day
- April 3: National Chocolate Moose Day
- April 4: Chocolate Milk Powder Day
- April 4: National Cordon Bleu Day
- April 5: National Caramel Day & Raisin and Spice Bar Day
- April 6: Fresh Tomato Day
- April 6: National Caramel Popcorn Day
- April 7: National Coffee Cake Day
- April 8: Milk in Glass Bottles Day
- April 8: National Empanada Day
- April 9: National Chinese Almond Cookie Day
- April 10: Cinnamon Crescent Day
- April 11: National Cheese Fondue Day
- April 12: National Licorice Day
- April 12: Grilled Cheese Sandwich Day
- April 13: National Peach Cobbler Day
- April 14: National Pecan Day
- April 15: Glazed Spiral Ham Day
- April 16: National Eggs Benedict Day
- April 16: Day of the Mushroom
- April 17: National Cheese Ball Day
- April 18: National Animal Cracker Day
- April 19: Garlic Day
- April 19: Amaretto Day
- April 20: Pineapple Upside Down Cake Day
- April 20: Lima Bean Respect Day
- April 21: Chocolate-Covered Cashew Truffle Day
- April 22: Jelly Bean Day
- April 23: Picnic Day
- April 24: Pigs-in-a-Blanket Day
- April 25: National Zucchini Bread Day
- April 26: National Pretzel Day
- April 27: Prime Rib Day
- April 28: National Blueberry Pie Day
- April 29: National Shrimp Scampi Day
- April 30: National Oatmeal Cookie Day
- April 30: Raisin Day

May

- May 1: National Chocolate Parfait Day
- May 2: National Truffles Day
- May 3: National Raspberry Tart Day

- May 4: National Orange Juice Day
- May 4: National Homebrew Day
- May 4: National Candied Orange Peel Day
- May 5: National Chocolate Custard Day
- May 5: Totally Chipotle Day
- May 5: National Hoagie Day
- May 6: National Crepes Suzette Day
- May 6: International No Diet Day
- May 6: National Beverage Day
- May 7: National Roast Leg of Lamb Day
- May 8: National Coconut Cream Pie Day
- May 8: National Empanada Day
- May 9: National Butterscotch Brownie Day
- May 10: National Shrimp Day
- May 11: National Mocha Torte Day
- May 11: Eat What You Want Day
- May 12: National Nutty Fudge Day
- May 13: National Apple Pie Day
- May 13: National Fruit Cocktail Day
- May 14: National Buttermilk Biscuit Day
- May 15: National Chocolate Chip Day
- May 16: National Coquilles St. Jacques Day
- May 17: National Cherry Cobbler Day
- May 18: National Cheese Soufflé Day
- May 19: National Devil's Food Cake Day
- May 20: National Quiche Lorraine Day
- May 20: Pick Strawberries Day
- May 21: National Strawberries & Cream Day
- May 22: National Vanilla Pudding Day
- May 23: National Taffy Day
- May 24: National Escargot Day
- May 25: National Wine Day
- May 25: National Brown Bag it Day
- May 26: National Blueberry Cheesecake Day
- May 26: National Cherry Dessert Day
- May 27: National Grape Popsicle Day
- May 28: National Brisket Day
- May 28: National Hamburger Day
- May 29: National Coq Au Vin Day
- May 30: National Mint Julep Day
- May 30: National Macaroon Day

June

- 1st Friday: National Doughnut Day
- June 1: National Hazelnut Cake Day
- June 2: National Chocolate Macaroon Day
- June 3: National Rocky Road Day
- June 4: National Frozen Yogurt Day
- June 5: National Gingerbread Day
- June 6: National Applesauce Cake Day
- June 7: National Chocolate Ice Cream Day
- June 9: National Strawberry Rhubarb Pie Day
- June 10: National Black Cow Day
- June 11: National German Chocolate Day
- June 12: National Peanut Butter Cookie Day
- June 13: National Lobster Day
- June 14: National Strawberry Shortcake Day
- June 16: National Fudge Day
- June 17: National Apple Streudel Day
- June 18: National Cherry Tart Day
- June 19: National Martini Day
- June 20: National Vanilla Milkshake Day
- June 21: National Peaches & Cream Day
- June 22: National Chocolate Eclair Day
- June 23: National Pecan Sandy Day
- June 24: National Creamy Pralines Day
- June 25: National Strawberry Parfait Day
- June 26: National Chocolate Pudding Day
- June 27: National Orange Blossom Day
- June 28: National Tapioca Day
- June 29: National Almond Butter Crunch Day
- June 30: National Ice Cream Soda Day

July

- 3rd Sunday: Sundae Day
- July 1: Creative Ice Cream Flavor Day
- July 1: National Gingersnap Day
- July 2: National Anisette Day
- July 3: National Chocolate Wafer Day
- July 3: Eat Beans Day
- July 4: National Barbecued Spareribs Day
- July 4: Caesar Salad Birthday
- July 4: Sidewalk Egg Frying Day
- July 5: National Apple Turnover Day
- July 5: Graham Cracker Day
- July 6: National Fried Chicken Day

- July 7: National Strawberry Sundae Day
- July 7: Chocolate Day
- July 7: Macaroni day
- July 7: Ice Cream Cone Day
- July 8: National Milk Chocolate with Almonds Day
- July 9: National Sugar Cookie Day
- July 10: National Piña Colada Day
- July 11: National Blueberry Muffin Day
- July 11: Vegetarian Food Day
- July 12: National Pecan Pie Day
- July 12: National Blueberry Muffin Day
- July 12: Eat Your Jello Day
- July 13: National Ice Cream Day
- July 13: National French Fries Day
- July 14: National Grand Marnier Day
- July 15: National Tapioca Pudding Day
- July 15: Gummi Worm Day
- July 16: National Corn Fritters Day
- July 16: Ice Cream Sundae Day
- July 16: Fresh Spinach Day
- July 16: National Ice Cream Day
- July 17: National Peach Ice Cream Day
- July 18: National Caviar Day
- July 19: National Daiquiri Day
- July 20: National Lollipop Day
- July 20: National Ice Cream Soda Day
- July 20: Fortune Cookie Day
- July 21: National Junk Food Day
- July 21: National Creme Brulee Day
- July 22: National Penuche Fudge Day
- July 22: Maple Syrup Day
- July 23: National Vanilla Ice Cream Day
- July 23: National Hot Dog Day
- July 24: National Tequila Day
- July 25: National Hot Fudge Sundae Day
- July 26: National Coffee Milkshake Day
- July 27: National Scotch Day
- July 27: National Cream Brulee Day
- July 28: National Milk Chocolate Day
- July 29: National Lasagna Day
- July 30: National Cheesecake Day
- July 31: Cotton Candy Day
- July 31: Jump for Jelly Beans Day
- July 31: National Raspberry Cake Day

August

- 1st Saturday: National Mustard Day
- August 1: National Raspberry Cream Pie Day
- August 2: National Ice Cream Sandwich Day
- August 3: National Watermelon Day
- August 4: National Chocolate Chip Day
- August 4: National Champagne Day
- August 6: National Root Beer Float Day
- August 7: National Raspberries & Cream Day
- August 8: National Frozen Custard Day
- August 9: National Rice Pudding Day
- August 10: National S'Mores Day
- August 11: National Raspberry Bombe Day
- August 12: National Toasted Almond Bar Day
- August 13: National Filet Mignon Day
- August 14: National Creamsicle Day
- August 15: National Lemon Meringue Pie Day
- August 16: National Rum Day
- August 17: National Vanilla Custard Day
- August 17: Cup Cake Day
- August 18: National Ice Cream Pie Day
- August 19: National Soft Ice Cream Day
- August 20: National Chocolate Pecan Pie Day
- August 20: National Lemonade Day
- August 21: National Spumoni Day
- August 22: National Pecan Torte Day
- August 23: National Spongecake Day
- August 24: National Waffle Day
- August 24: National Peach Pie Day
- August 25: National Banana Split Day
- August 25: National Waffle Day
- August 26: National Cherry Popsicle Day
- August 27: National Pots du Creme Day
- August 28: National Cherry Turnover Day
- August 29: Eat Healthy Day
- August 29: National Whisky Sour Day
- August 29: More Herbs Less Salt Day
- August 29: National Lemon Juice Day
- August 30: National Marshmallow Toasting Day
- August 31: National Trail Mix Day
- August 31: Eat Outside Day

September
- September 1: National Cherry Popover Day
- September 2: National Blueberry Popsicle Day
- September 3: National Welsh Rarebit Day
- September 4: National Macadamia Nut Day
- September 4: Eat an Extra Dessert Day
- September 5: National Cheese Pizza Day
- September 6: National Coffee Ice Cream Day
- September 7: National Napoleon Day
- September 8: National Date-Nut Bread Day
- September 9: National Steak au Poivre Day
- September 11: National Hot Cross Bun Day
- September 12: National Chocolate Milkshake Day
- September 13: National Peanut Day
- September 14: National Cream-Filled Donut Day
- September 15: National Creme de Menthe Day
- September 17: National Apple Dumpling Day
- September 19: National Butterscotch Pudding Day
- September 20: National Rum Punch Day
- September 21: National Pecan Cookie Day
- September 22: National White Chocolate Day
- September 23: National Chocolate Day
- September 24: National Cherries Jubilee Day
- September 25: National Crab Newberg Day
- September 26: National Pancake Day
- September 27: National Chocolate Milk Day
- September 27: National Corned Beef Hash Day
- September 28: National Strawberry Cream Pie Day
- September 29: National Mocha Day
- September 30: National Mulled Cider Day

October
- 2nd Friday: World Egg Day
- October 1: World Vegetarian Day
- October 2: National French Fried Scallops Day
- October 3: National Carmel Custard Day
- October 4: National Taco Day
- October 5: National Apple Betty Day
- October 6: National Noodle Day
- October 7: National Frappe Day
- October 8: National Fluffernutter Day
- October 9: National Dessert Day
- October 10: National Angel Food Cake Day
- October 11: National Sausage Pizza Day

- October 13: National Yorkshire Pudding Day
- October 14: National Chocolate Covered Insect Day
- October 15: National Roast Pheasant Day
- October 15: Mushroom Day
- October 15: Chicken Cacciatore Day
- October 16: World Food Day
- October 16: Oatmeal Day
- October 17: National Pasta Day
- October 18: National Chocolate Cupcake Day
- October 19: National Seafood Bisque Day
- October 20: National Brandied Fruit Day
- October 21: National Pumpkin Cheesecake Day
- October 22: National Nut Day
- October 23: National Boston Cream Pie Day
- October 24: National Bologna Day
- October 25: National Greasy Foods Day
- October 26: National Mincemeat Pie Day
- October 27: National Potato Day
- October 28: National Chocolate Day
- October 29: National Pancake Day
- October 30: National Candy Corn Day
- October 31: National Caramel Apple Day

November

- November 1: National French Fried Clam Day
- November 2: National Deviled Egg Day
- November 3: Sandwich Day
- November 4: National Candy Day
- November 5: National Doughnut Day
- November 6: National Nachos Day
- November 7: Bittersweet Chocolate with Almonds Day
- November 8: National Harvey Wallbanger Day
- November 9: National Scrapple Day
- November 10: National Vanilla Cupcake Day
- November 11: National Sundae Day
- November 12: National Pizza with the Works Day
- November 13: National Indian Pudding Day
- November 14: National Guacamole Day
- November 16: National Fast Food Day
- November 17: National Baklava Day
- November 17: Homemade Bread Day
- November 18: National Vichyssoise Day
- November 19: Carbonated Beverage with Caffeine Day
- November 20: National Peanut Butter Fudge Day

- November 21: National Stuffing Day
- November 22: National Cranberry Relish Day
- November 23: National Cashew Day
- November 23: National Eat A Cranberry Day
- November 24: National Espresso Day
- November 25: National Parfait Day
- November 26: National Cake Day
- November 27: National Bavarian Cream Pie Day
- November 28: National French Toast Day
- November 29: National Chocolates Day
- November 30: National Mousse Day

December

- December 1: National Pie Day
- December 1: National Eat A Red Apple Day
- December 2: National Fritters Day
- December 3: National Ice Cream Box Day
- December 4: National Cookie Day
- December 5: National Sacher Torte Day
- December 6: National Gazpacho Day
- December 7: Cotton Candy Day
- December 8: Brownie Day
- December 9: National Pastry Day
- December 9: Apple Pie Day
- December 10: National Lager Day
- December 11: National Noodle-Ring Day
- December 12: National Ambrosia Day
- December 12: Gingerbread House Day
- December 13: National Cocoa Day
- December 14: National Bouillabaisse Day
- December 15: National Lemon Cupcake Day
- December 16: Chocolate Covered Anything Day
- December 17: National Maple Syrup Day
- December 18: National Roast Suckling Pig Day
- December 19: Oatmeal Muffin Day
- December 20: National Fried Shrimp Day
- December 20: National Sangria Day
- December 21: National Hamburger Day
- December 21: Kiwi Fruit Day (California)
- December 22: National Date Nut Bread Day
- December 23: National Pfeffernuesse Day
- December 24: National Egg Nog Day
- December 25: Pumpkin Pie Day
- December 26: National Candy Cane Day

- December 26: National Coffee Percolator Day
- December 27: National Fruit Cake Day
- December 28: National Chocolate Candy Day
- December 28: Chocolate Day
- December 29: Pepper Pot Day
- December 30: National Bicarbonate Of Soda Day
- December 31: National Champagne Day

119.3 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)

119.4 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

120

STATE FOODS

120.1 Overview

Thirty-three (33) states have proclaimed one or more official food designations. Such designation is generally made by a commemorative resolution of a state legislature or proclamation of a governor. The designations are aimed at raising awareness of the association of a food item with a state and as a promotional tool; they do not have the force of law.

The following are official state foods:

120.2 List of Official State Foods

Alabama

- State fruit: Blackberry
- State nut: Pecan
- State tree fruit: Peach

Arkansas

- State fruit/vegetable: South Arkansas Vine Ripe Pink Tomato
- State grain: Rice

Florida

- State fruit: Orange
- State pie: Key lime pie

Georgia

- State fruit: Peach
- State prepared food: Grits
- State vegetable: Vidalia Sweet Onion

Idaho

- State food: Potato
- State fruit: Huckleberry

Illinois

- State fruit: Gold Rush Apple
- State snack food: Popcorn

Indiana

• State pie:	Hoosier Pie (Sugar cream pie)

Kentucky

• State fruit:	Blackberry

Louisiana

• State fruit:	Strawberry
• State jellies:	Mayhaw jelly and Louisiana sugar cane jelly
• State meat pie:	Natchitoches meat pie
• State vegetable:	Sweet potato

Maine

• State dessert:	Blueberry pie made with wild Maine blueberries
• State fruit:	Wild blueberry
• State soft drink:	Moxie
• State treat:	Whoopie pie

Maryland

• State dessert:	Smith Island Cake
• State food:	Blue crabs

Massachusetts

• State bean:	Baked navy bean
• State cookie:	Chocolate chip cookie
• State dessert:	Boston cream pie
• State doughnut:	Boston cream doughnut
• State fruit:	Cranberry
• State muffin:	Corn muffin

Minnesota

• State fruit:	Honeycrisp apple
• State grain:	Wild rice
• State muffin:	Blueberry muffin
• State mushroom:	Morel

Missouri

• State fruit:	Norton Cynthiana grape
• State dessert:	Ice cream cone

New Hampshire

• State fruit:	Pumpkin

New Jersey

• State fruit:	Highbush Blueberry
• State vegetable:	Jersey Tomato

New Mexico

• State cookie:	Bizcochito
• State vegetables:	Chiles and Frijoles (refried beans)

New York

• State fruit:	Apple
• State muffin:	Apple muffin

North Carolina

• State berries:	Blueberry and Strawberry
• State fruit:	Scuppernong Grape
• State vegetable:	Sweet potato

North Dakota

• State fruit:	Chokecherry

Ohio

• State fruit:	Tomato

Oklahoma

• State fruit:	Strawberries
• State meals:	Barbecued pork, Biscuits, Black-eyed peas, Chicken fried steak, Corn, Cornbread, Fried okra, Grits, Sausages and gravy, Squash
• State pie:	Pecan pie
• State vegetable:	Watermelon

Oregon

• State fruit:	Pear
• State mushroom:	Pacific Golden Chanterelle
• State nut:	Hazelnut (Filbert)

Pennsylvania

• State cookie:	Chocolate chip cookie

Rhode Island

• State fruit:	Rhode Island Greening Apple

South Carolina

- State fruit: Peach
- State snack: Boiled peanuts

South Dakota

- State bread: Frybread
- State dessert: Kuchen

Tennessee

- State fruit: Tomato

Texas

- State bread: Pan de campo
- State dish: Chili con carne
- State fruit: Texas Red Grapefruit
- State health nut: Native pecan
- State native pepper: Chiltepin
- State pastries: Sopaipilla and Strudel
- State pepper: Jalapeño
- State snack: Tortilla chips and salsa
- State vegetable: Sweet onion

Utah

- State fruit: Cherry
- State historic vegetable: Sugar beet
- State snack: Jell-O
- State vegetable: Spanish sweet onion

Vermont

- State fruit: Apple
- State pie: Apple pie

Washington

- State fruit: Apple
- State vegetable: Walla Walla sweet onion

West Virginia

- State fruit: Golden Delicious apple

APPENDIX A

ACADEMIC PROGRAMS

The 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 Rd., Suite 100, Tucson, AZ 85712
- The Art Institute of Virginia Beach, 4500 Main Street, Suite 100, VA Beach, VA 23462
- The Art Institute of Washington, 1820 North Fort Myer Drive, Arlington, VA 22209
- The Art Institute of Wisconsin, 320 East Buffalo Street, Suite 600, Milwaukee, WI 53202
- The Art Institutes International Kansas City, 8208 Melrose Drive, Kansas City, KS 66214
- The Art Institutes International Minnesota, 15 South 9th Street, Minneapolis, MN 55402
- The Illinois Institute of Art - Chicago, 350 N. Orleans Street, Chicago, IL 60654

Atlantic Cape Community College (http://www.atlantic.edu/aca/index.htm)
- Academy of Culinary Arts (Atlantic City), 1535 Bacharach Boulevard, Atlantic City, NJ 08401
- Academy of Culinary Arts (Cape May County), 341 Court House-South Dennis Road, Cape May Court House, NJ 08210
- Academy of Culinary Arts (Mays Landing), 5100 Black Horse Pike, Mays Landing, NJ 08330

Baker College (www.culinaryinstitutemi.com)
- Culinary Institute of Michigan, 1903 Marquette Avenue, Muskegon, MI 49442.

Baltimore International College (www.bic.edu/school-of-culinary-arts)
- School of Culinary Arts, 17 Commerce Street, Baltimore, MD 21202

City College of San Francisco
(www.ccsf.edu/Departments/Culinary_Arts-Hospitality_Studies/)
- Culinary Arts & Hospitality Studies, 50 Phelan Avenue, SW 156, San Francisco, CA 94112

- Culinary and Service Skills Training Program, 88 Fourth Street/Mission, San Francisco, CA 94103

The Culinary Institute of America (www.ciachef.edu)
- Main Campus: 1946 Campus Drive, Hyde Park, NY 12538
- Greystone: 2555 Main Street, St. Helena, CA 94574
- San Antonio: 312 Pearl Parkway, Building 2, Suite 2102, San Antonio, TX 78215

Culinary Institute of Virginia (www.chefva.com)
- 2428 Almeda Avenue, Suite 106, Norfolk, VA 23513

Florida International University (www.fiu.edu)
- School of Hospitality & Tourism Management, Biscayne Bay Campus, 3000 N.E. 151st Street, North Miami, FL 33181

The French Culinary Institute (www.frenchculinary.com)
- Main Campus: 462 Broadway, New York, NY 10013
- West Coast: 700 West Hamilton Avenue, Campbell, CA 95008

The Institute of Culinary Education (www.iceculinary.edu)
- 50 West 23rd Street, New York, NY 10010

Johnson and Wales University (www.jwu.edu)
- Main Campus: 8 Abbott Park Place, Providence, RI 02903
- 801 West Trade Street, Charlotte, NC 28202
- 1701 NE 127th Street, North Miami, FL 33181
- 7150 Montview Boulevard, Denver, CO 80220

Keiser University, Center for Culinary Arts (www.keiseruniversity.edu/culinary/)
- 1700 Halstead Boulevard, Building 2, Tallahassee, FL 32309
- 900 S. Babcock Street, Melbourne, FL 32901
- 6151 Lake Osprey Drive, Sarasota, FL 34240

Kendall College (www.kendall.edu)
- School of Culinary Arts, 900 N. North Branch St, Chicago, IL 60642

L'École Culinaire (www.lecoleculinaire.com)
- 9811 South Forty Drive St. Louis, MO, 63124
- 1245 N. Germantown Parkway Cordova, TN 38016

Le Cordon Bleu College of Culinary Arts (www.chefs.edu)
- Atlanta: 1927 Lakeside Parkway, Tucker, GA 30084
- Austin: 3110 Esperanza Crossing, Suite 100, Austin, TX 78758
- Boston: 215 First Street, Cambridge, MA 02142

- Chicago: 361 West Chestnut, Chicago, IL 60610
- Dallas: 11830 Webb Chapel Road, Suite 1200, Dallas, TX 75234
- Las Vegas: 1451 Center Crossing Road, Las Vegas, NV 89144
- Los Angeles: 530 East Colorado Boulevard, Pasadena, CA 91101
- Miami: 3221 Enterprise Way, Miramar, FL 33025
- Minneapolis/Saint Paul: 1315 Mendota Heights Road, Mendota Heights, MN 55120
- Orlando: 8511 Commodity Circle, Suite 100, Orlando, FL 32819
- Portland: 600 SW 10th Avenue Suite 500, Portland, OR 97205
- Sacramento: 2450 Del Paso Road, Sacramento, CA 95834
- San Francisco: California Culinary Academy, 350 Rhode Island Street, San Francisco, CA 94103
- Scottsdale: 8100 East Camelback Road, Suite 1001, Scottsdale, AZ 85251
- Seattle: 360 Corporate Drive North, Tukwila, WA 98188
- St. Louis: 7898 Veterans Memorial Parkway, St. Peters, MO 63376

Lincoln Culinary Institute (www.lincolnedu.com/schools/lincoln-culinary-institute)
- 85 Sigourney Street, Hartford, CT 06105
- 8 Progress Drive, Shelton, CT 06484
- 9325 Snowden River Parkway, Columbia, MD 21046
- 2410 Metrocentre Boulevard, West Palm Beach, FL 33407

Miami Culinary Institute (www.miamidadeculinary.com)
- Wolfson Campus, 415 NE 2nd Avenue #9104, Miami, FL 33132

Michigan State University (www.bus.msu.edu/shb/)
- School of Hospitality Business, 645 N. Shaw Lane, Rm 232, East Lansing, MI 48824

Mitchell Technical Institute
(www.mitchelltech.edu/programs/ViewProgram.aspx?id=5&ContentID=9)
- Culinary Academy of South Dakota, 1800 E. Spruce Street, Mitchell, SD 57301

New England Culinary Institute (www.neci.edu)
- 56 College Street, Montpelier, VT 05602

Nicholls State University (www.nicholls.edu/culinary/)
- Chef John Folse Culinary Institute, 107 Gouaux Hall, P.O. Box 2099, Thibodaux, LA 70310

Oregon Coast Culinary Institute (www.occi.net)
- 1988 Newmark Avenue, Coos Bay, OR 97420

San Diego Culinary Institute (http://sdci-inc.com/)
- 8024 La Mesa Boulevard, La Mesa, CA 91941

Southwest Minnesota State University
(www.smsu.edu/academics/programs/culinology/Index.cfm)
- 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 (www.sullivan.edu/nchs.asp)
- National Center For Hospitality Studies, 3101 Bardstown Road, Louisville, KY 40205

SUNY Oneonta (www.oneonta.edu/academics/huec/FSRA3.asp)
- Food Service and Restaurant Administration, Department of Human Ecology, Ravine Parkway, Oneonta, NY 13820.

University of Central Florida (http://hospitality.ucf.edu/)
- Rosen College of Hospitality Management, 9907 Universal Boulevard, Orlando, FL 32819

University of Houston (www.hrm.uh.edu)
- Conrad N. Hilton College of Hotel and Restaurant Management, 4800 Calhoun Road, Houston, TX 77004

University of Nevada, Las Vegas (www.unlv.edu/hotel/cam)
- William F. Harrah College of Hotel Administration, Food & Beverage Management Department, 4505 S. Maryland Parkway, Box 456022, Las Vegas, NV 89154.

University of New Haven (www.cthospitality.us)
- Hospitality and Tourism Management, 300 Boston Post Road, West Haven, CT 06516

University of Tennessee (http://culinary.utk.edu/)
- The Culinary Institute, 220B Jessie Harris Building, Knoxville, TN 37996

Walters State Community College (www.ws.edu/academics/business/culinary-arts)
- Department of Hospitality Business, 500 South Davy Crockett Parkway, Morristown, TN 37813

Walnut Hill College (www.walnuthillcollege.edu)
- The Restaurant School at Walnut Hill College, 4207 Walnut Street, Philadelphia, PA 19104

APPENDIX B

ANALYSTS & MARKET CONSULTANTS

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

Beverage Information Group, 17 High Street, 2nd Floor, Norwalk, CT 06851. (203) 855-8499. (www.bevinfogroup.com)

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

Black Box Intelligence, 17304 Preston Road, Suite 430, Dallas, TX 75252. (972) 364-0490. (www.blackboxintelligence.com)

Center for Culinary Development, 1255 Battery Street, Suite 100, San Francisco, CA 94111. (415) 693-8900. (www.ccdsf.com)

CFI Group, 625 Avis Drive, Ann Arbor, MI 48108. (734) 930-9090. (www.cfigroup.com)

Chain Store Guide, 10117 Princess Palm Drive, Tampa, FL 33610. (813) 627-6800. (www.csgis.com)

Consumer Edge Insight, 1 Landmark Square, 9th Floor, Stamford, CT 06901. (203) 504-8122. (www.consumeredgeinsight.com)

Datassential, 1762 Westwood Boulevard, Suite 250, Los Angeles, CA 90024. (877) 886-3687. (www.datassential.com)

Empathica, 2121 Argentia Road, Suite 200, Mississauga ON L5N 2X4. (905) 542-9001. (www.empathica.com)

Environ International Corporation, 2200 Powell Street, Suite 700, Emeryville, CA 94608. (510) 655-7400. (www.environcorp.com)

Federation of Dining Room Professionals, 1417 Sadler Road, Suite 100, Fernandina Beach, FL 32034. (904) 491-6690. (www.fdrp.com)

GfK Knowledge Networks, 2100 Geng Road, Suite 210, Palo Alto, CA 94303. (650) 289-2000. (www.knowledgenetworks.com)

GfK MRI, 75 Ninth Avenue, 5th Floor, New York, NY 10011. (212) 8884-9200. (www.gfkmri.com)

GuestMetrics Inc., 1602 Village Market Boulevard, Leesburg, VA 20175. (703) 297-3400. (www.guestmetrics.com)

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

Information Resources, Inc., 150 North Clinton Street, Chicago, IL 60661. (312) 726-1221. (www.infores.com)

Malcolm M. Knapp Inc., 26 East 91st Street, New York, NY 10128. (212) 289-7782. (www.malcolmknapp.com)

Market Force Information, Post Office Box 270355, Louisville, CO 80027. (303) 402-6920. (www.marketforce.com)

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

New Strategist, P.O. Box 242, Ithaca, NY 14851. (800) 848-0842. (www.newstrategist.com)

Packaged Facts, 11200 Rockville Pike, Suite 504, Rockville, MD 20852. (240) 747-3095. (www.packagedfacts.com)

Restaurant Marketing Group, 5421 South Helena Street, Centennial, CO 80015. (303) 521-1988. (www.rmktgroup.com)

Restaurant Research LLC, 1 Cricklewood Road, Redding, CT 06896. (203) 938-4703. (www.restaurantresearch.info)

Restaurant RX Consulting, 4767 New Broad Street, Orlando, FL 32814. (407) 517-2789. (www.restaurantrxconsulting.com)

Revenue Management Solutions, 777 South Harbour Island Boulevard, Suite 890, Tampa, FL 33602. (813) 277-0034. (www.revenuemanage.com)

Richard K. Miller & Associates, 4132 Atlanta Highway, Suite 110, Loganville, GA 30052. (888) 928-7562. (www.rkma.com)

Sandelman & Associates, 257 La Paloma, Suite 1, San Clemente, CA 92672. (949) 388-5600. (www.sandelman.com)

Scarborough Research, 770 Broadway, New York, NY 10003. (646) 654-8400. (www.scarborough.com)

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

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

The Beverage Information Group, 17 High Street, 2nd Floor, Norwalk, CT 06851. (203) 855-8499. (www.bevinfogroup.com)

The Gallup Organization, 901 F Street NW, Washington, DC 20004. (202) 715-3030. (www.gallup.com)

The Hartman Group, 3150 Richards Road, Suite 200, Bellevue, WA 98005. (425) 452-0818. (www.hartman-group.com)

The Kruse Company, 5636 River Oaks Place NW, Atlanta, GA 30327. (404) 256-0770. (no website)

The Media Audit, 10333 Richmond Avenue, Suite 200, Houston, TX 77042. (713) 626-0333. (www.themediaaudit.com)

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

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

Zagat Survey LLC, 76 9th Avenue, 4th Floor, New York, NY 10011. (212) 977-6000. (www.zagat.com)

APPENDIX C

ASSOCIATIONS

American Beverage Association, 1101 Sixteenth Street NW, Washington, DC 20036. (202) 463-6732. (www.ameribev.org)

Beer Institute, 122 C Street NW, Suite 350, Washington, DC 20001. (202) 737-2337. (www.beerinstitute.org)

Brewers Association, 736 Pearl Street, Boulder, CO 80302. (303) 447-0816. (www.brewersassociation.org)

Distilled Spirits Council of the United States, 1250 Eye Street NW, Suite 400, Washington, DC 20005. (202) 628-3544. (www.discus.org)

Food Marketing Institute, 2345 Crystal Drive, Suite 800, Arlington, VA 22202. (202) 452-8444. (www.fmi.org)

International Bottled Water Association, 1700 Diagonal Road, Suite 650, Alexandria, VA 22314. (703) 683-5213. (www.bottledwater.org)

International Dairy Foods Association, 1250 H Street NW, Suite 900, Washington, DC 20005. (202) 737-4332. (www.idfa.org)

National Association of Pizzeria Operators, 908 South 8th Street, Suite 200, Louisville, KY 40203. (502) 736-9530. (www.napo.com)

National Coffee Association, 45 Broadway, Suite 1140, New York, NY 10006. (212) 766-4007. (www.ncausa.org)

National Council of Chain Restaurants, division of the National Retail Federation, 325 7th Street NW, Suite 1100, Washington, DC 20004. (202) 783-7971. (www.nccr.net)

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

Organic Trade Association, 28 Vernon Street, Suite 413, Brattleboro, VT 05301. (802) 275-3800. (www.ota.com)

Research Chefs Association, 1100 Johnson Ferry Road, Suite 300, Atlanta, GA 30342. (404) 252-3663. (www.culinology.com)

Society of Foodservice Management, 455 South 4th, Suite 650, Louisville, KY 40202. (502) 574-9931. (www.sfm-online.org)

Specialty Coffee Association of America, 330 Golden Shore, Suite 50, Long Beach, CA 90802. (562) 624-4100. (www.scaa.org)

Tea Association of the USA, 362 5th Avenue, Suite 801, New York, NY 10001. (212) 986-9415. (www.teausa.org)

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

APPENDIX D

PERIODICALS

Beer Marketer's Insights, 49 East Maple Avenue, Suffern, NY 10901. (845) 507-0040. (www.beerinsights.com)

Beverage Digest, P.O. Box 621, Bedford Hills, NY 10507. (914) 244-0700. (www.beverage-digest.com)

Beverage Dynamics, 17 High Street, 2nd Floor, Norwalk, CT 06851. (203) 855-8499. (www.beveragenet.net)

Beverage World, 333 Seventh Avenue, 11th Floor, New York, NY 10001. (646) 708-7300. (www.beverageworld.com)

Cheers, 17 High Street, Norwalk, CT 06851. (203) 855-8499. (www.beveragenet.net)

Cornell Hospitality Quarterly, Cornell University, 185 Statler Hall, Ithaca, NY 14853. (607) 255-3025. (http://cqx.sagepub.com/)

Food Arts, M. Shanken Communications, 387 Park Avenue South, New York, NY 10016. (212) 684-4224. (www.mshanken.com/foodarts/)

FoodService Director, 90 Broad Street, Suite 402, New York, NY 10004. (630) 574-5075. (www.fsdmag.com)

FSR: Ideas and Insights for Full-Service Restaurants, 4905 Pine Cone Drive, Suite 2, Durham, NC 27727. (919) 945-0713. (www.fsrmagazine.com)

Market Watch, M. Shanken Communications, 387 Park Avenue South, New York, NY 10016. (212) 684-4224. (www.mshanken.com/marketwatch/)

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

Pizza Today, National Association of Pizza Operators, 908 South 8th Street, Suite 200, Louisville, KY 40203. (502) 736-9500. (www.pizzatoday.com)

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

Restaurant Business, 90 Broad Street, Suite 402, New York, NY 10004. (630) 574-5075. (www.monkeydish.com)

Restaurant Finance Monitor, 2808 Anthony Lane South, Minneapolis, MN 55418. (612) 767-3200. (www.restfinance.com)

APPENDIX E

STATE RESTAURANT ASSOCIATIONS

Alabama

- Alabama Restaurant Association, 61B Market Place, Montgomery, AL 36117. (334) 244-1320. (www.alabamarestaurants.com/index2.cfm)

Alaska

- Alaska Cabaret, Hotel, Restaurant & Retailers Association, 1503 W. 31st Avenue, Suite 202, Anchorage, AK 99503. (907) 274-8133. (www.alaskacharr.com)

Arizona

- Arizona Restaurant Association, 4250 N. Drinkwater Boulevard, Suite 350, Scottsdale, AZ 85251. (602) 307-9134. And 465 W. St. Mary's Road, Suite 300, Tucson, AZ 85701. (520) 791-9106. (www.azrestaurant.org)

Arkansas

- Arkansas Hospitality Association, 603 S. 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, 1451 South King Street, Suite 503, Honolulu, HI 96814. (808) 944-9105. (www.restauranthi.com)

Idaho

- Idaho Lodging & Restaurant Association, P.O. Box 1822, Boise, ID 83701. (208) 342-0010. (www.idahohospitality.net)

Illinois

- Illinois Restaurant Association, 33 W. Monroe Street, Suite 250, Chicago, IL 60603. (312) 787-4000. (www.illinoisrestaurants.org)

Indiana

- Indiana Restaurant Association, 200 S. Meridian Street, Suite 350, Indianapolis, IN 46225. (317) 673-4211. (www.indianarestaurants.org)

Iowa

- Iowa Restaurant Association, 8525 Douglas Avenue, Suite 47, Des Moines, IA 50322. (515) 276-1454. (www.restaurantiowa.com)

Kansas

- Kansas Restaurant & Hospitality Association, 3500 N. Rock Road, Building 1300, Wichita, KS 67226. (316) 267-8383. (www.krha.org)

Kentucky

- Kentucky Restaurant Association, 133 Evergreen Road, Suite 201, Louisville, KY 40243. (502) 896-0464. (www.kyra.org)

Louisiana

- Louisiana Restaurant Association, 2700 N. Arnoult Road, Metairie, LA 70002. (504) 454-2277. (www.lra.org)

Maine

- Maine Restaurant Association, 45 Melville Street, Suite 2, Augusta, ME 04330. (207) 623-2178. (www.mainerestaurant.com)

Maryland

- Restaurant Association of Maryland, 6301 Hillside Court, Columbia, MD 21046. (410) 290-6800. (www.marylandrestaurants.com)

Massachusetts

- Massachusetts Restaurant Association, 333 Turnpike Road, Suite 102, Southborough, MA 01772. (508) 303-9905. (www.massrestaurantassoc.org)

Michigan

- Michigan Restaurant Association, 225 W. Washtenaw Street, Lansing, MI 48933. (517) 482-5244. (www.michiganrestaurant.org)

Minnesota

- Minnesota Restaurant Association, 305 East Roselawn Avenue, Saint Paul, MN 55117. (651) 778-2400. (www.hospitalitymn.org)

Mississippi

- Mississippi Hospitality & Restaurant Association, 130 Riverview Drive, Suite C, Flowood, MS 39232. (601) 420-4210. (www.msra.org)

Missouri

- Missouri Restaurant Association, 1810 Craig Road, Suite 225, St. Louis, MO 63146. (314) 576-2777. (www.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 E. Tropicana Avenue, Suite 114-A, Las Vegas, NV 89119. (702) 878-2313. (www.nvrestaurants.com)

New Hampshire

- New Hampshire Lodging & Restaurant Association, 341 Loudon Road., Unit 3, P.O. Box 1175, Concord, NH 03302. (603) 228-9585. (www.nhlra.com)

New Jersey

- New Jersey Restaurant Association, 126 W. State Street, Trenton, NJ 08608. (609) 599-3316. (www.njra.org)

New Mexico

- New Mexico Restaurant Association, 9201 Montgomery Boulevard NE, Suite 602, Albuquerque, NM 87111. (505) 343-9848. (www.nmrestaurants.org)

New York

- New York State Restaurant Association, 409 New Karner Road, Suite 202, Albany, NY 12205. (518) 452-4222. (www.nysra.org)

North Carolina

- North Carolina Restaurant and Lodging Association, 6036 Six Forks Road, Raleigh, NC 27609. (919) 844-0098. (www.ncrla.biz)

North Dakota

- North Dakota Hospitality Association, P.O. Box 428, Bismarck, ND 58502. (701) 223-3313. (www.ndhospitality.com)

Ohio

- 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 and Lodging Association, 8565 SW Salish Lane, Suite 120, Wilsonville, OR 97070. (503) 682-4422. (www.oregonrla.org)

Pennsylvania

- Pennsylvania Restaurant Association, 100 State Street, Harrisburg, PA 17101. (717) 232-4433. (www.parestaurant.org)

Rhode Island

- Rhode Island Hospitality Association, 94 Sabra Street, Cranston, RI 02910. (401) 223-1120. (www.rihospitality.org)

South Carolina

- South Carolina Hospitality Association, P.O. Box 7577, Columbia, SC 29202. (803) 765-9000. (www.schospitality.org)

South Dakota

- South Dakota Retailers Association Restaurant Division, P.O. Box 638, 320 E. Capitol, Pierre, SD 57501. (605) 224-5050. (www.sdra.org)

Tennessee

- Tennessee Hospitality Association, 475 Craighead Street, Nashville, TN 37204. (615) 385-9970. (www.tnhospitality.net)

Texas

- Texas Restaurant Association, P.O. Box 1429, Austin, TX 78767. (512) 457-4100. (www.restaurantville.com)

Utah

- Utah Restaurant Association, 5645 Waterbury Way, Suite D203, Salt Lake City, UT 84121. (801) 274-7309. (www.utahdineout.com)

Vermont

- Vermont Chamber of Commerce, Hospitality Division, P.O. Box 37, Montpelier, VT 05601. (802) 223-3443. (www.vtchamber.com)

Virginia

- Virginia Hospitality & Travel Association, 2101 Libbie Avenue, Richmond, VA 23230. (804) 288-3065. (www.vhta.org)

Washington

- Washington Restaurant Association, 510 Plum Street SE, Suite 200, Olympia, WA 98501. (360) 956-7279. (www.wrahome.com)

West Virginia

- West Virginia Hospitality and 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 & Restaurant Association, P.O. Box 1003, Cheyenne, WY 82003. (307) 634-8816. (www.wlra.org)

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Frumkin, Paul, "Beverage-Snack Builds On Positive Growth Momentum," *Nation's Restaurant News*, July 23, 2012, pp 68-69.

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